

Narrative Report  
**“Everything You Wanted to Know about  
Human Resources and More”**

Lake Junaluska, NC

August 3-6, 2008

*Sunday, August 3, 2008-*

**Welcome**

Rexanne welcomed everyone to the conference and opened with prayer. She read scripture from Corinthians. She reminded us that everyone has a place in ministry with their own talents and gifts. We are all a part of the body of Christ. Being in contact with people daily and dealing with the subject of human resources we need to store these scriptures in our hearts.

We introduced ourselves by giving our name, church, and an exciting new event or program at our home church. She introduced Jimmy Carr, a Lake Junaluska representative, who talked about the Lake's features that are available for those staying on campus. Lake Junaluska had some renovations this past year which include two new paintings at the Terrace Inn. Rexanne took an opportunity to thank the Executive Board for their dedicated work in putting together this year's conference. She then went over the week's schedule. We were dismissed for the evening meal of BBQ, provided by Munsey UMC. The setting was outside on the porch of the Kern Center by the lake.

**Session One:**

This session opened with the Munsey United Methodist Church Praise Team leading us in praise and worship. Evelyn sent a greeting from her husband who has been out of the nursing home for one year.

She began by asking “Who are we?” She then answered with saying “we are human beings, the only ones on earth that need to make meaning out of life”. She told us a story of “Wad Leigh”, who was a duck but did not know who he was. His physical appearance and voice were different than all of the others at the farm where he lived. In the end, Wad Leigh realized he was God's creation and just as important as everyone else.

We are defined by our name with the same father who loves us very much. In Gen. 1:26-29 it tells us we were created by God, in His image, and with God's spirit as our resource. We are created with the ability to love and respond to love. This love is Agape Love, an unconditional love. This love works for the other persons good and asks for nothing in returned. The more we respond to love the more it develops in us. The greatest commandment that Jesus gave us was to love God and our neighbor as ourselves. This love is mental, spiritual, physical, and relational. Christianity is a relational faith. The more we respond to beauty the healthier we are. We are made to create beauty and respond to beauty. We are made to conceive justice and pursue it. Being righteous is being rightly related to God, self, and others. She went on to tell us about the orphanage in Romania. Finally we are made to communicate with God and know God. We are never alone. He is with us all the time, so we can talk with him anytime.

She summed up with telling us we are in ministry in mind, body, soul, and relationship. Our name ends in “Leigh” because we are sons and daughter of God.

Munsey UMC Praise team closed with some praise and worship.

After a prayer we gathered outside to have some dessert and coffee with a “getting to know you” activity. Rexanne gave everyone a cardboard tie and markers. We were to decorate our tie in a way that tells something about us. We then shared them with our tables.

*Monday, August 4, 2008*

### **Session Two**

Rexanne welcomed everyone and prayed to begin the morning. Linda led us with some gospel music. Rexanne welcomed Evelyn to our conference and thanked her for being with us and giving us some great insight this week.

Evelyn began this session going over the points she had made Sunday night. She wanted to present human resources from the spiritual aspect. Who we are and how we live begins with the Beatitudes in Matthew 5. As she was studying this scripture she found herself not liking the Beatitudes. So she went back to the Arabic translation of "Blessed" which means "O the sheer joy".

The spiritual nature of a human being is the Beatitudes. They are not an idea but a statement of what will happen when one is rightly related to God. She began with verse one: "Oh, the sheer joy who are poor in spirit, for theirs are the kingdom of Heaven." Poor in spirit means eager to grow in spirit. In Luke 18:9 the tax collector is poor in spirit. If you are full in spirit you are righteous. God has mercy. That is why we need ask God to enter into our bodies and give us what we need, not what we deserve. The reward for being "poor in spirit" is the Kingdom of Heaven. The kingdom of Heaven is in the present. It is our mind, soul, body, and relationship with God.

In verse two "Oh the sheer joy of those who mourn for they will be comforted." The more we love the more we mourn. The more we mourn the more we will be comforted. We need to enter into a mournful state to be comforted by God and those whom he puts around us. She closed us with a prayer.

### **Session Three and Four- Employment Regulations for Church**

Sandy Seay gave a short background of his experiences in the subject of Human Resources. He gave us a copy of the "Balancing Reality with Grace- Human Resources in the Church" handout that would cover the sessions he was leading. He will be covering State and Federal Government Regulation in sessions one through five. In sessions six through nine he will be covering Hiring, Motivating, and Maintaining Employees.

He began this session stating that churches are not exempt from employment regulations. The only exemption is for unionized organizations, which churches usually are not. The other exemption is if the job is directly related to the religious organization doctrine.

There are two main principles to know about human resources: Burden of proof is always on the employer and the burden of proof is met by documentation. You should have two employee files. One file needs to have the I-9, tax information and job applications, evaluation history, pay records, and appraisal information. The other should hold personal information, medical information, and other information you feel is important. All organization policies and procedures should have a clause which reserves the right to interpret all policies. He went through the 10 items on page three dealing with the burden of proof being met by thorough documentation. We, as church administrators, need to know the correct documentation for personnel files.

### **Break**

### **Session Four- Employment Regulations for Church- Part Two**

Sandy discussed the state and federal employment regulations on page two. The regulations he pointed out were numbers 2,4,15, and 50. Number two refers to equal employment opportunity. Make sure all employees have an I-9. This form verifies the alien status and the right to work in the United States legally. Number four covers worker's compensation in the event of an accident of an employee. All churches need to carry worker compensation for their employees. If you have more than 2 employees you need to know the negligent employment practices, and if you have 50 or more employees you need to know the family leave policies.

Sandy then addressed the Wage and Hour Requirement for exempt and non-exempt employee. All exempt employees are exempt from keeping timecards and overtime. These employees are paid a set

salary with the minimum being \$455 without deductions. The non-exempt employees are required to have timecards and track all overtime hours. These employees are paid by the hour.

To be an exempt employee you must be in a professional position such as clergy, directors, or executive employees who manage 2 or more employees. Most preschool or grade school teachers are in the exempt category because they are giving instruction. A secretarial position, bookkeeper, day care workers or any clerical position would fall under the non-exempt category. All non-exempt employees need to have a meal period of at least 30 minutes and be completely uninterrupted. If these periods are interrupted with a work related conversation or question then it is a paid break.

We as employers should provide an equal employment opportunity. You can deny employment for sexual harassment, hostile work environment, racial, religious, and ethnic harassment that can be showed through language, touch, and/or reaction. We need to have a harassment policy with all of these wrapped into one policy. Under the disability act we can not use a disability as a reason to not hire an individual. We as the employer need to make reasonable accommodations for the individual. Drug addiction and Alcoholism are regarded as a disability.

## **Break**

### **Session Five- How to Hire Church Employee**

There are three important measurements when hiring. There is character, working style, and performance and qualifications. When you are interviewing a potential employee they will be at their best during the interview. Their character is the most important part in the interview. You need to be able to identify the person's character; look for the inner essences. Working style varies from individual to individual. Some examples are detailed oriented, right to be right, submissive, as well as other. With performance and qualifications we need to find the right people for the right job. Sandy went through the quick points on pages seven through nine. When we set up to complete an interview we need to have the tools to be an effective interviewer, know the purpose of the interview, know what you want to learn from the interview, and be aware of the way to help an interview run smoothly, identify the red flags, and know how to end the interview. He finished with the check points on page nine "the interviewing, screening, and hiring process."

### **Business Session**

Rexanne called the meeting to order. She gave instructions for the lunchtime discussions. Terry Coon presented the Executive Board's proposal for the Zeb Barnhardt Scholarship Fund. He began with a quick introduction of who Zeb was to the organization. The funds will be used to help an individual attend NICFA Training. To qualify for the scholarship the applicant will need to be actively serving a United Methodist Church and a good standing member of the SEJUMBCA. The funds will be available for 2010. The opening officer positions were presented for nominations. Ken will provide directions to Lake Logan at our next meeting. A carpool list will be available if anyone would like to carpool. There will be dinner, music, and the installation service at Lake Logan. Prior to leaving Lake Junaluska we will all meet at the chapel for a group picture.

### **Dismissed for lunch at the Terrace Inn**

There were three discussion tables during lunch. They were Human Resources, Capital/Building Funding or Campaigns, and Electronic Giving methods.

### **Administration Forum**

We joined back together after lunch for the Administrative Forum. Questions were submitted earlier during the day to be asked to the whole group. Below are a few of the questions and answers.

- Do you allow paid organist or instrumentalist to give private lessons on the church property or equipment? If so, do they pay the church a usage fee?

Some said yes, because it is a way of building the worship arts community within the church for future musicians. The students are asked to play for worship services during the year. Some said no, because of the non-profit rules. They have created a “musical academy” to umbrella it under the church.

- Does anyone have any experience or history with 360 degree evaluations?  
Few had some experience with little success. With a larger organization it is a great tool. The ones who have completed the process had hired a service to come in to facilitate it. It did not play a part of the performance evaluation. It was only used as a learning tool. There is another tool that is better and easier called Prism with the NACBA.
- What is the relationship between a Business Administrator and SPR Committee?  
The BA needs to deal directly with SPR with budget figures and employee evaluations and performance levels. This relationship needs to be close. Some church's have the senior pastor that passes information to the chairman of the committee. Some have a sub-committee for non-exempt and exempt employees.
- Is it okay to hire a person at base pay X but pay Y to absorb the cost of the family health insurance cost?  
This is not a good policy. If you offer it to one person you will need to offer it to the others to make it fair across the board. Make the offer for employment at the X cost and give the benefits that are offered to all employees.
- Does anyone have a current Kitchen Manager who is full time? If so, what are their duties and salary?  
Some said they outsource the work, which is more predicable and cost efficient. Some suggested the NACBA Salary Survey for any church position. There is also an Admin Group through the internet to get job descriptions. Some said they use contract employees whom carry their own liability insurance.
- What % of the church budget is made of salaries and benefits?  
50-60%- depending on the life cycle of the church and stewardship level
- What are some financial training programs that have been successful for the congregation?  
Some suggested Financial Peace which has been highly successful. Good Sense is also a good program.

After all the questions were asked we were dismissed to enjoy an afternoon of free time in Waynesville.

*Tuesday, August 5, 2008*

### **Session Six- Evelyn Laycock**

Linda McClarnon opened the morning up with some traditional music.

Evelyn recapped the points she made on Monday morning. She reminded us that “poor in Spirit” means “eager to grow in the Word.” The average church is in stage two...look how far we need to grow spiritually.

She continued with Matthew 5: 5 “Oh, the sheer joy of those that are meek for they will inherit the earth.”

The American meaning of meek is timid, gentle, passive, and submissive, power under control.

The Arabic meaning is to take off your false face- peel off piece by piece until the real person comes out.

The 30 year old bracket wear the false faces because they are trying to prove themselves and try to impress others. When we pull off our false face we become more aware of whom we are. We are sons and daughters of God. We are created in His image. We need to be real with ourselves and others. The more confident that we are loved by God, the more we put down our false face, then the more we receive love and the more we love. We need to pray day by day to be real. When we are real we don't desire possessions. We don't have to own it to enjoy it.

We inherit the earth once we let our possessions go and enjoy what is around us. There will be a need to create beauty for someone else to enjoy. The more we are in “onement” with God the more we see

beauty. We began to see the world as He wants us to see it. Just for one day try to name 100 things of beauty and see how your vision changes.

Matthew 5:6 says “Oh, the sheer joy of those who hunger and thirst for righteousness for they will be filled.” This verse is hard for us to understand because we as a group have never really been physically hungry or thirsty. Righteousness means being rightly related with God, self, and others. As we are righteous we will be filled with God, Jesus, and the Holy Spirit. The Holy Spirit is the power necessary for the tasks ahead. God wraps people up in righteousness to do his will. Ask yourself, “Am I rightly related to God and all humanity I come in contact with everyday?” If not, what holds us back?

## **Break**

### **Session Seven- Sandy Seay- Background Check**

Sandy started off by recapping yesterday’s sessions about documentations. He wanted to touch on Background Checks. All church administrator's need to know the different types of background checks. There are criminal, previous employers, driving records, credit reports, and educational credential checks. Before you hire someone be sure to check with their last 3 previous employers. When you are questioned about past employees stick with the facts. Do not answer the “Would you rehire this individual?” question. Always do state, local, and federal criminal background check. You can not use an arrest record to not hire. A judgement withheld is usually not on a person’s record. We need to look at the time period of the incident and make a judgment call as an employer. There are driving records for those who might drive in their jobs. A credit check needs to be completed if the individual will be handling money. You can also use My Space, Face Book, and/or Google the name. These will help you capture the character of an individual. You also need to check Educational and Professional Credentials for validation especially for senior positions.

### **Counseling and Disciplining Employees**

Documentation pays off with counseling and disciplining employees. Make sure the employee file has all disciplinary and counseling information documented. Progressive discipline takes the form of 3 strikes and you’re out. The first is usually a verbal warning which is noted in the file. The second is a written reprimand signed by both employee and employer. The employee does not need to sign but note it on the document as “employee refused to sign.” Written reprimands are for correcting behaviors. You need to clearly tell the employee the correct behavior expected. Always give a copy of the written reprimands to the employee. The third is a separation notice. The following are reasons for discipline: absence, tardiness, performance, relationship issue, gossip, violation of policy, sexual or physical harassment, and/or confidentiality. You do not want a table of disciplinary actions and consequences in your employee handbook. You do want a list of rules and regulations. This is to protect the employer and employee. If an employee violates the policy or rules then the employee can be disciplined and/or dismissed. We need to treat all employees equally according to policy. Some violations such as stealing, violence, guns on church campus (except in GA and FL because it is a state law), and/or sexual harassment are causes for immediate dismissal. You need to make sure these are listed in your policy and how they are dealt with. Make sure when you discipline an employee document it in their file. Use great detail when documenting.

## **Break**

Sandy went over dismissal issues on page 12 in the handout. Don’t be afraid to dismiss someone. This process is sometimes necessary to correct their behavior. In most cases the behavior will get worse if not corrected. It is healthier for the church to dismiss a disruptive employee to allow the healing to start. Issues like these which are left alone tend to get worst.

### **Session Eight- Compensating Church Employees**

Compensation depends on the church budget, but we need to stay competitive and fair with the secular jobs. The unemployment rate is around 5% nationwide. During the Baby Boomer period a lot of people came into the labor market. In the current period, called Baby Bust, there are fewer people in which to choose from. It is hard to find good employees. One way to find good employees is through compensation. All church's need to have a comprehensive compensation program in place. This should include job descriptions, salary grades, and steps which have a minimum and maximum for each grade. Salary grades are based on the job description and salary steps are based on experience and performance levels. The ERI (Economic Research Institute) is a great resource for information in developing a compensation chart with minimums and maximums for each grade. The Cost of Living raise varies. The consumer's price index is 1.5-2%. This should be separated from all other raises. A true raise needs to be based on performance appraisal. The standard raise has been around 4%.

In the policy there needs to be regulations that address vacation, sick, or personal time off. An excellent plan is the "Paid Time Off Plan". PTO is covered on page 14 in the handout.

### **Session 9- Motivating Church Employees to Superior Performance**

The number one asked question is how to resolve conflict at the workplace. We have conflict because we are human beings and are made differently. The best way to promote understanding of "why we act the way we do" is to identify work styles and personality temperaments. There are many ways to measure this information. Once you understand the temperaments of those around you, the way you deal with them will be different. Sandy presented a design that has four styles of temperaments. Usually you will have a dominant and secondary one. The Choleric Hard Drive Type A is usually a take charge person who is motivated by achievement or accomplishment. The Sangrine usually leads with their heart. The Perfectionist is usually concerned with getting it right. The Phlegmatic and Dependable usually avoid conflict at all cost. About 40% of the populations are Choleric. Temperament measurement is a major tool used to resolve conflict in your staff.

Sandy offered his services through email for any questions that have not been covered in the prior sessions.

### **Business Meeting**

Rexanne call the meeting to order by thanking Sandy for being with us this week. The 2007 minutes were approved as written. The financial report will be updated after the conference when the bulk of expenses will be paid. The Zeb Barnhardt Scholarship fund will need additional money to grow. Anyone who would like to make a donation can do so by giving or sending a check to Bill Perham label Zeb Barnhardt. The Executive Board will make a final decision on the amount each year to be added to the scholarship fund based on the balance after all conference expenses have been paid. A motion was passed to give a \$500 gift to the UMCOR for the Spring Storms in the Mid-West. The new slate of officers for the new year was passed. Rexanne reminded everyone to submit their evaluation forms in the morning. After lunch there will be a panel discussion with Sandy. She asked to have your questions in before you leave for lunch. We will meet at the chapel at 5 p.m. and leave for Lake Logan at 5:15 p.m. Ken gave a set of driving instructions to everyone. He also gave a preview of next years conference by asking for some specific areas we would like to see covered. Dr. Mallet will be our spiritual leader.

**Lunch-** Table Discussion was the same as the day before.

### **Panel Discussion-**

How do you verify illegal immigration?

- Usually by green card, social security card. The employee needs to provide information required or not hire the individual

What is your history with 360 degree evaluations?

- Should not be used as an evaluation tool. Just some way to do something different

Can you ask any personal relationship questions during an interview?

- No, but ask this “Tell me about yourself.”

Can we not hire someone because of religious beliefs?

- Not unless it is job related such as clergy or ministry leader

Are we allowed to give out copies of the employee file?

- The Privacy Act applies only to Federal Employees. Always have the employee’s permission before you make copies of the file. Benefits should be kept in a separate file.

What is the best vacation policy?

- The PTO Plan is the best. Some churches have the policy of 1 year work earns 1 week, 2-5 years earns 2 weeks, more than 5 years earns 3 weeks.

*Tuesday, August 5, 2008-*

### **Group Picture and Lake Logan**

We all met to take a picture of the whole group at the chapel. Afterwards we left for Lake Logan for dinner, entertainment, and installation service. The Dawden Sisters provided some great entertainment after a delicious dinner of pork tenderloin. Rod McClarnon led us in the service of the installation of officers.

*Wednesday, August 6, 2008*

### **Session 10- Evelyn Laycock**

Linda opened us with some praise and worship music. Evelyn continued her segment on the Beatitudes. She said we need to study the scripture in a four dimensional view. We need to look at it mentally, physically, spiritually, and relationally. The Beatitudes are statements of what will happen when Jesus is our center of being a human.

She picked up with Matthew 5:7- “Oh, the sheer joy of those who are merciful for they will be shown mercy.” Mercy is entering someone else’s skin and giving them what they need; not what they deserve. She reminded us about the parable of the robbed and beaten man whom the priest, the Levite, and the Samaritan came upon. The priest and Levite by law cannot go near the man. The Samaritan knows the law but goes and helps the man anyway. He shows mercy. The priest and Levite have religion. Mercy will be in the soul, mind, and relational part of our body. We all have points of needs.

In verse 8- “Oh the sheer joy of those who have pure hearts for they will see God.” This means there is no other Gods. The heart is the seat of feeling. One that does not have any other Gods. We seek nothing but the will of God for the moment. God is the center of every moment. When we are pure of heart we see God. When we are pure in heart we don’t allow doom and gloom to rent space.

In verse 9- “Oh, the sheer joy of those who are peacemakers for they will be called sons of God.” A peacemaker deals with the root cause of the problem. They look at it through prayer and relationship. They correct it. A peacemaker is a child of God.

In verse 10- “Oh, the sheer joy of those who are persecuted.” This could be persecuted mentally, physically, or relationally for being rightly related to God in mind, body, soul, and relationship. Theirs is the kingdom of Heaven.

In verse 11-12- “We are to rejoice when people try to hurt us. Rejoice for your reward is great.” You will have problems and you need to handle them with prayer. Pray for yourself but also for those who hurt you. Pray that they will come to know the living Lord.

## **Break**

### **Business Session**

Ken called the meeting to order with thanks to the Executive Board for a wonderful conference. He gave a special thanks to Rexanne in her leadership this past year. He gave a brief highlight of next year's conference. The 14 core competencies or areas of responsibility for CBAs are identified through the FCBA Certification training classes. So we don't really have 14 technologies....but rather....14 primary areas of responsibility as a Church Business Administrator that we need a working knowledge of...and...although they list technology as one of the core competencies, it is involved in all of those other areas. As we serve to facilitate the Ministries of the Church, technology is involved directly and indirectly in every area. There is purchasing, financial, staff development, food services, human resources, record maintenance, grant writing, volunteer training, plant property, strategic planning, office management, marketing and communications, legal and taxes. The big question is "Are we an analog church living in a digital world?" The dates for the 2009 conference are August 2-5, 2009. Ken encourages everyone to use the word of mouth as a market tool for next year's conference. He gave a quick reminder to turn in the evaluations forms. The information received helps make the conference better for the attendees. Vicki closed us in prayer.