

*Roman Catholic Diocese of Boise*

**PARISH/SCHOOL  
HUMAN RESOURCES  
MANUAL**

*Managing the Church's Greatest Resource  
Revised September 2009*





# *Roman Catholic Diocese of Boise*

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# *Roman Catholic Diocese of Boise*

## **1. Introduction**

The mission of the Human Resources Department of the Diocese of Boise is to serve those in leadership positions, both at the diocesan and parish/school levels. This Manual is provided to support that philosophy of service, so that valuable and useful information concerning parish/school employment practices is readily available to those who need the information. This Manual, while not “official policy,” supplements the official personnel policies of the Diocese, by providing parish/school leaders with practical advice, information, forms, checklists and other resources to assist parish/school leaders in managing the church’s most important resource, its people.<sup>1</sup>

## **2. The Church as Employer**

Every parish/school should be familiar with the principles of Christian Human Resource Management. These principles should be the guiding force in making decisions about personnel issues at the parish/school level. Some of the more important principles which should guide employment-related decisions include:

***Basic Principles of Christian Human Resource Management:*** These principles can be gleaned from Catholic teachings on social justice, as those teachings apply to the workplace:

- **Dignity of the Human Person:** Is the workplace one that promotes basic human dignity? Does it promote mutual respect and trust?
- **The Significance of Work:** John Paul II’s encyclical “On Human Work” teaches that it is through work that humans achieve fulfillment. Thus, work related decisions must respect the feelings that workers have about the significance of work.
- **Collegiality:** All persons working within the church should cooperate in a spirit of trust and generosity, and decisions should be made with as much consultation and collaboration as possible.
- **Subsidiarity:** Individuals should participate in the decision-making process about their personal work situations, and decisions should be made at the lowest appropriate level.
- **Individual Responsibility (Autonomy) and Initiative:** Each person should be allowed to act without coercion or undue force, but with a corresponding obligation of responsibility and accountability.
- **Stewardship of Resources:** We demonstrate accountability for the resources given to the parish by the faithful.

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<sup>1</sup> Questions, comments and requests for additional information to be included in this manual can be directed to the Human Resources Department of the Diocese of Boise, 1501 Federal Way, Boise ID 83705; (208) 342-1311x 5155 or [bfontaine@rcdb.org](mailto:bfontaine@rcdb.org). More information on the philosophy, mission and services of the HR Department can also be found on the Diocesan website, <http://www.catholicidaho.org>

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***Economic Justice for All:*** The USCCB Pastoral Letter on “Economic Justice for All” also provides some guidance on workplace issues.

- **Wages and Salaries:** Church workers should receive a sufficient wage and social benefits similar to those received from responsible United States employers.
- **Rights of Employees:** Church workers have a right to organize in asserting their rights as workers. The church should adopt new models of collaboration with workers.

***NACPA: Just Treatment for Those Who Work for the Church:*** The National Association of Church Personnel Administrators (NACPA) has also developed guidelines for church employers to use in developing and encouraging practices that will assure just treatment for church workers. Some of the principles NACPA stresses include:

- As a prophetic voice, churches should **Model** just treatment for workers.
- As witnesses of the Gospel, **Personnel Policies** should be developed which are compatible with the mission and values of the church.
- Churches should develop participatory processes that foster **Consultation**.
- Decision making should be consistent with **Subsidiarity**, i.e., making decisions at the lowest possible level.
- Churches should practice **Just Stewardship** with their human resources.
- Care should be taken in the **Management of Assets** so that pensions, insurance, etc. are properly managed.
- Employment practices should reflect the **Multi-cultural** church.
- Respect for the fundamental dignity of all persons means that churches should develop policies which foster **Good Reputation and Privacy**.
- The Church should recognize the basic right of workers to **Form Associations**.

***Just Compensation: Guiding Principles:*** In 1990 NACPA published a document on just compensation providing guiding principles for just compensation for church workers. These guidelines provide that compensation should be:

- Based on the value of work to the organization, with both internal and external equity considered.
- Compensation should be based on the principle that workers are paid a Living Wage which provides for the basic human needs of workers.

***Basic Assumptions of a Just Compensation System:*** NACPA’s Guiding Principles also include some basic assumptions about compensation that should guide decisions on these issues:

- Compensation decisions should be based on the essential mission of the organization, and a determination of the relationship of positions to fulfilling that mission.

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- The church's teachings on social justice should be a guide for making compensation decisions.
- The philosophy of compensation should be clearly articulated.
- Decisions on compensation should promote dignity.
- Compensation systems should foster participation, communication and mutuality.
- Compensation should be based on a reasonable work week.
- There should be lay parity for deacons and religious who work for the church.
- The compensation program should be published, communicated, understandable, predictable and stable.
- There should be a standard performance appraisal process for all workers.

### **3. Diocesan Personnel Policies**

Bishop Michael P. Driscoll has promulgated personnel policies that apply to all parishes and schools in the Diocese of Boise. The latest version of these policies was promulgated effective January 1, 2004, Revised September 14, 2009. That policy contains guidance for parishes, as employers, on handling basic human resource issues. Whenever a human resource issue arises, the parish/school leader should first consult the Diocesan policy for guidance. In the event the question is not answered by the policy, the leader should consult the Diocesan Director of Human Resources for guidance in handling the issue.

A copy of the personnel policies should be provided to each person on the payroll of the parish/school. An acknowledgement form is provided, and each employee should be required to sign the acknowledgement form. A copy of the form should be placed in the employee's file at the parish/school. Parishes/schools should pay particular attention to the diocesan policies on recordkeeping and confidentiality of personnel information. Those policies are included in the diocesan personnel policies.

### **4. Recruiting New Employees**

This section contains general guidance on recruiting staff members for parishes.

- ✓ **How do you recruit for a new staff member?** Keep in mind: you need to *match the qualifications* of the person *to the job* you are recruiting for---thus you need a clear idea of what job you want the person to do, and you need to have a clear idea of how the person you want to hire fits the job. Thus, you should have:
  - A **job description** listing minimum qualifications and personal criteria for the ideal candidate. (See Appendix for instructions on completing job descriptions, and sample job descriptions provided with this Manual).
  - A **list of requirements** for the position, and a **list of questions** designed to test whether applicants possess the right attributes.
  - Proper **forms and questionnaires** that help applicants show you how they fit the job.

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- **Proper interview questions** (some questions are illegal - do you know what they are? See listing included later in this Manual).
  - Some **method of rating** candidates against the job requirements.
- ✓ **Who should be involved in the recruiting process?** The parish/school leadership should generally be involved in the decision making process for hiring a new staff member. Depending upon the parish or school and the circumstances of the hiring decision, this should include the pastor/parish life director or principal, and can also include members of parish leadership councils, members of the affected constituency, other interested parishioners, etc. The Diocesan Human Resources Department is available to assist any parish in developing an effective process, and appropriate forms for each search. A search committee should generally be formed that will perform the tasks required in developing an appropriate search for a qualified candidate. The search committee's function would be to provide a variety of views and experiences, so that the most qualified candidate can be discovered. The primary role of the committee is to screen applications, and conduct the interview process. Generally, a committee of at least three and no more than six or seven is a good size for the search committee. In some cases, particularly for clerical or maintenance positions, a committee may not be necessary. Ultimately, the final decision must be made by those who supervise the individual to be hired, i.e., the pastor/parish life director/principal. The search committee or parish leader conducting the recruiting should use the checklist included below to determine the appropriate steps in the recruiting process.

All of these things can be accomplished using the forms and helpful hints included within this section of the Manual.

### **A. Checklist: The Hiring Process**

The following checklist may be helpful in guiding the hiring process. Parishes and schools should consider each step in the process. Sample forms, checklists and other assistance are provided throughout this Manual for each of these steps.

- Job Description Reviewed/Revised.  
*Sample job descriptions are provided in this Manual in the Appendix.*
- Application Packet Prepared.  
*Sample Applications, Supplemental Applications, and Instructions are provided in this Manual.*
- Hiring timeline set.
- Advertisement prepared.  
*Sample advertisements are provided in this Manual.*
- Advertisement placed.  
*Information on available ad placement sites and cost is available from the Human Resources Department. Ads can often be placed for free on national websites such as the NCEA, catholicjobs.com, NCCL, NFYCM, etc. In addition, information on the opening can be placed for free on the diocesan*

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*website, and in local church bulletins. Ads are available for a minimal fee through Idaho Catholic Register and other regional diocesan newspapers.*

- Applications received.
- Applications reviewed and assessed by team.  
*Sample forms to use in assessing applicants are provided with this Manual.*
- Team meets to compare assessments and determine top applicants.
- Team determines interview questions and protocol.  
*Sample questions and instructions on what cannot be asked are included in this Manual.*
- Interview of top applicants set.  
*Interview ideas are provided in this Manual.*
- Interviews conducted.
- References checked.  
*Sample forms for checking references are included in this Manual*
- Hiring decision made/offer made.
- Confirming letter sent.  
*A sample offer letter is included in this Manual.*
- Criminal background check performed.  
*Background checks are performed by the Human Resources Department, and the forms are available at the parish in the Safe Environment Program Manual, or from Human Resources.*
- Work begins.

### **B. Advertising for an Open Position**

Parishes and schools should advertise for open positions, in the manner most suited to the position being filled. Advertising the position helps the parish or school to develop that largest pool of potential applicants, and thus helps to assure that the most qualified person will be selected.

Advertise in those places most likely to reach the type of recruit that you want. You can do a national search for some positions, or a local search for others. In some cases, a bulletin announcement will suffice.

The Human Resources Department has taken advantage of the following types of advertising: (1) advertising for education or ministry positions through the free postings on the National Catholic Education Association website; (2) advertising through free postings on catholicjobsonline.com; (3) advertising in the National Catholic Reporter; (4) Advertising in *Crux of the News*; (5) Advertising in regional diocesan newspapers; (6) advertising in the Idaho Catholic Register; (7) posting job openings on our diocesan website; (8) advertising in local secular newspapers; and (9) advertising in local church bulletins. The Human Resources Department can help draft position announcements and assist in placing ads in the appropriate places; Spanish speaking positions are advertised through Idaho Unido, located in Pocatello, Idaho. Their telephone number is: (208) 234-7383. In addition, there may be other media which also reach the Spanish speaking community.

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## **1. Sample advertisements**

Included below are several examples of the types of advertisements that can be used to attract qualified applicants to open positions. Advertisements should be descriptive enough so that applicants can exclude themselves if they are not qualified, and so that the position seems attractive to those who are qualified. The ad should include a brief description of the job duties, the qualifications, information about how to apply, and any other important information that must be communicated to all potential applicants. Keep in mind that ads should be very short for paid advertising. Avoid any language in the advertisements that could raise implications of discrimination (such as hiring for male, female, Mexican, younger, healthy, etc. See later section of this Manual for description of obligations of parishes/schools regarding discrimination.)

### **Pastoral Associate**

[Parish] seeks a highly motivated, energetic individual to serve as pastoral associate at [Parish—describe parish, # of families, etc., parish location]. The person who fills this position will [list important job duties]. The position will require [list personal qualities of pastoral associate from job description] and the ability to work with and collaborate with a wide variety of people with varying interests. The PA will report to the pastor. Interested individuals can secure a job description and application from Dr. Bob Fontaine, Director of Human Resources, Diocese of Boise, 1501 S. Federal Way, Ste. 400, Boise ID 83705, (208) 342-1311, x 5155, or e-mail [bfontaine@rcdb.org](mailto:bfontaine@rcdb.org) [or parish contact information]. *[Note: Shorter versions of this ad can be placed in paid media, with a reference to the diocesan website, and full information can be placed on the website, including position announcements, applications, job descriptions, etc. This will save in the cost of paid advertising.]* Applications, resumes and related information can be submitted online. The deadline for applications is [deadline date].

### **Principal, Bishop Kelly High School, Boise, Idaho**

Bishop Kelly High School (BKHS) is actively seeking a principal for the 2004-2005 school year. The candidate must have a master's degree, at least five years of school administration experience, and be eligible for certification in the State of Idaho, with a deep commitment to Catholic education. BKHS, Idaho's only Catholic High School, is located in beautiful Boise, Idaho, a capital city in a growing and vibrant economic area with picturesque scenery and an abundance of recreational opportunities. BKHS provides an environment which supports and strengthens the efforts of the student's primary family by offering a Catholic community based on Christian values and focused on high moral, social, academic and athletic standards. BKHS has a long and proud history, dating back to the graduating class of 1965. The non-profit Bishop Kelly Foundation was created to support the values and objectives of BKHS, and the principal must develop a strong working relationship with the Foundation and its Board. BKHS has a current enrollment of over 600 students, with over 70 staff members. More information is available on the BKHS website at [www.bk.org](http://www.bk.org)

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The selected candidate will be an active, practicing Catholic with an understanding of Catholic faith, history and tradition, a person of high moral standards with a reputation for integrity, vision and imagination. The selected candidate will become the instructional leader of BKHS, with responsibilities in the spiritual, instructional, strategic, and management leadership areas. The successful candidate will report to the President, and through the president to the Board of Governance. The successful candidate will have the ability to collaborate with parent and alumni groups, as well as with the leadership of the school, Diocesan leadership, and the greater Catholic community. The position requires excellent written and verbal communication skills. The position begins on July 1, 2004. Resumes will be accepted through March 1, 2004, or until the position is filled. Interested applicants should secure an application packet and instructions from the Diocesan Director of Human Resources, Dr. Bob Fontaine, 1501 S. Federal Way, Boise ID 83705, (208) 342-1311 x 5155, [bfontaine@rcdb.org](mailto:bfontaine@rcdb.org).

*Bishop Kelly High School's Mission as a Catholic, Christian educational community is to develop the whole person — physical, mental and spiritual — with special emphasis on developing the mind to know truth (human and divine), the heart to seek Christian values (temporal and eternal), and the body to express those values through action.*

### **Director of Youth Ministry**

(Name of Parish) Catholic Church seeks a highly motivated, energetic individual to create, direct and maintain regional outreach to Catholic youth in the parish, located in (City), Idaho. The person who fills this position will minister to Catholic youth in sixth through twelfth grades. The position will require a passion for working with teens and an understanding of the needs, hopes, and desires of this age group. Applicants must also have the ability to work and collaborate with volunteers, parish staff, and a diversity of cultures. The Director will report to the Pastor. Consistent with the call of Jesus Christ to evangelization and calling forth of all Catholic peoples, the Director is called to serve as the primary motivator for providing ministry to youth in the parish. The job description, application packet and other information can be obtained by contacting (Contact name and address of Parish); e-mail, telephone number and Fax number, and closing date.

### **Coordinator/Director of Religious Education**

(Name of Parish) of Boise seeks a Coordinator/Director of Religious Education, who is responsible for the training and supervision of catechists and the religious education of children and youth, pre-K through 12<sup>th</sup> grade. It is preferred that Applicants have experience as a Catechist and as a Coordinator/Director of Religious Education. A Master of Arts in Religious Education or related field is also preferred. The position would begin September 1, 2007 and would be approximately 30 hours a week. Applicants may obtain a job description and application packet which contains compensation and benefit information, from Name and address of , telephone number (208) 444-0000 or e-mail address: Deadline: December 11, 2007.

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## **C. Application Forms**

There are many types of application forms that can be used to gather information from an applicant prior to selecting applicants for an interview. An application should be designed to fulfill several different purposes:

- ✓ It should gather identifying and contact information from the applicant for later reference.
- ✓ It should gather information on the applicant's qualifications and educational background, including past employment opportunities, so that those can be compared to the job description.
- ✓ It should gather information necessary for checking references for the applicant.
- ✓ It should provide a method for applicants to describe their qualifications in a way that makes it apparent whether they are qualified for the position.

Applications should be kept for all applicants. Check the diocesan record retention policy, included in the Policies and Practices Manual, for the latest guidance on record retention.

### **1. Instructions for Completing Application-Forms**

It may be helpful to provide specific instructions to each applicant outlining what information the search committee requires for a complete application packet. Each applicant should be provided with a copy of the job description, so that they can determine whether they meet the qualifications. In addition, it is often helpful to provide specific written instructions for completing the application packet. Some examples are included below.

---

### **Instructions for Submitting Applications Pastoral Associate**

The following documents should be completed and returned to the address listed below by the application deadline of [Application Deadline]:

1. A cover letter explaining why you are interested in this position.
2. Diocese of Boise Application for Employment.
3. Supplemental application for Pastoral Associate.
4. Three written letters of reference.
5. [Optional] Resume.

In completing the required documents, refer to the job description for this position.

Completed application packets should be submitted to:

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## **Parish Contact**

**Address**

**Phone**

**E-mail**

*More information on the application process can be obtained by contacting the parish. Electronic copies of the documents can also be requested from the parish contact and can be submitted electronically.*

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## **Instructions for Submitting Applications Coordinator, Youth Ministry**

The following documents should be completed and returned to the address listed below by the application deadline of [Application Deadline]:

1. A cover letter explaining why you are interested in this position.
2. Application for Employment.
3. Supplemental application for Youth Ministry.
4. Three written letters of reference detailing experience in youth ministry, and explaining the writer's ability to observe work performance.
5. [Optional] Resume.

In completing the required documents, refer to the job description for this position. Completed application packets should be submitted to:

## **Parish Contact**

**Address**

**Phone**

**E-mail**

*More information on the application process can be obtained by contacting the parish. Electronic copies of the documents can also be requested from the parish contact and can be submitted electronically.*

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## **2. Application for Employment Form**

The application for employment form provided to applicants should, at a minimum, include basic application information. In addition, for selected positions, including ministerial positions, parishes can also develop specific questionnaires to be completed by each applicant. A sample form for the basic application is on the next page.

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An Equal Opportunity Employer

Date: \_\_\_\_\_

## The Roman Catholic Diocese of Boise

# Application for Employment

*The Diocese of Boise recruits, hires and promotes on the basis of merit, competence and qualifications, without being influenced by race, color, sex, age, marital status, national origin, disability or veteran status. The diocese reserves the right to be the sole judge of merit, competence and qualifications and may favor Catholic applicants and co-workers in all employment decisions.*

New Applicant

Rehire Within Diocese

Transfer Within Diocese

Last Name Middle	First	Social Security Number			
Street Address		Home Phone			
City, State, Zip		Business/Message Phone			
Have you ever been employed by the Diocese of Boise, or any Catholic Diocese? Yes _____ NO _____ If "Yes", please state when and where.					
If Hired, can you furnish proof that you are either a U.S. Citizen, or otherwise legally permitted to work in the United States? Yes _____ No _____					
Have you ever been convicted of a felony? Yes _____ No _____ If "Yes," Please explain on Page _____					

Name and Location of School	No. Years	Major	Degree/Date
High School			
College			
Graduate School			
Professional Trade or Other			
Skills Typing WPM _____ Computer Experience _____			
Other training or skills including Bilingual ability			



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May we contact your present employer?                      Yes [ ]                      No [ ]

List date available for work \_\_\_\_\_

State any additional information you feel may be helpful in considering your application

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Give the names of three persons you are not related to, whom you have known for at least one year.

Name	Address and Telephone Number	Business	Years Known
1.			
2.			
3.			

United States Military Service					
Dates From	To	Service Branch	Initial Rank	Final Rank	Type of Discharge

Do you have relatives or friends Employed by the Diocese of Boise? If "Yes", Give name(s) and location(s).

Yes \_\_\_\_\_ No \_\_\_\_\_

Present Salary:	Salary Expectations:
-----------------	----------------------

Comments, Special Skills, Interests, Qualifications or Accomplishments Not Previously Noted

**Please Read Carefully Before Signing**

I understand and agree that this application is not a contract and that acceptance of employment is not a contract of employment for a specified term unless it is in writing and signed by an authorized diocesan representative. I understand and agree that I may resign my employment with the Diocese of Boise at any time for any reason and that my employment may be terminated at the will of the Diocese of Boise at any time for any reason. I also understand that any handbooks, manuals, policies and procedures maintained by the Diocese of Boise are not contractual in nature and may be amended or abolished at the sole discretion of the Diocese of Boise. I further understand that the employment relationship between the Diocese of Boise and its employees may be governed by canon law as well as civil law.

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The diocese will not deny employment to any applicant solely because the person has been convicted of a crime. The diocese, however, may consider the nature, date and circumstances of the offense as well as whether the offense is relevant to the duties of the position applied for.

Pursuant to the Immigration Reform and Control Act, the Diocese of Boise will employ only those individuals who are eligible to work in the United States. Accordingly, all new employees will be required to demonstrate their eligibility to work in the United States. Failure to do so will result in termination or revocation of the offer of employment.

Information furnished in this application and any supporting documents is true and complete to the best of my knowledge and belief, and I understand that any misrepresentation or omission of material fact on this or any other record submitted pertinent to employment will constitute grounds for immediate dismissal.

Signature of Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Office of Human Resources  
Diocese of Boise  
1501 S. Federal Way, Ste 400  
Boise, ID 83705-5925  
Telephone: (208) 342-1311 x 5156  
Fax: (208) 489-7475

Use the space below to explain and account for periods of Unemployment or additional Comments on Employment History.


Do Not Write In This Section  
For Office Use Only

Interviewed by	Date
Hire Date	
Position	
Salary	
Start Date	Office
Human Resources Approval	

Revised February 26, 2009

## *Roman Catholic Diocese of Boise*

### **3. Checklist of things to watch for in applications**

- ✓ Did the individual fill out all required fields in the application form?
- ✓ Did the applicant complete the application by hand or on the computer? This may be important if the position for which you are hiring requires good computer skills.
- ✓ Is the application packet neat and orderly?
- ✓ Are there words misspelled? This may be important if written communication is required for this position.
- ✓ Is enough information provided about the person's educational qualifications to be able to determine whether the person actually received a degree, and if so, from what institution? Does the degree match the educational qualifications sought for the position? If you are not familiar with the type of degree listed, and the content knowledge included within it, do you need to consult with others who are more knowledgeable, or ask more questions of the applicant?
- ✓ Has the person moved frequently? If so, can you determine the reason for that?
- ✓ Does the person list complete contact information for past employers?
- ✓ Does the applicant provide complete information as to the reason for leaving prior positions, or are there questions raised about particular positions?
- ✓ Does the applicant list references that will be helpful to the screening process?

Answers to all of these questions may help you determine which applicants will be selected for an interview, and which applications are lacking in information and thus may require you to ask more detailed questions.

### **4. Supplemental Application Forms**

As mentioned above, it is sometimes helpful, particularly for ministerial positions, to ask all applicants to complete a more extensive application, focusing on the subject matter areas that are most important for that position. This is a way to screen out candidates based upon their philosophy, experience, and attitude towards the position. It is also a way to test their written presentation skills, philosophy, approach to problem solving, conflict resolution skills, and any other areas that are deemed important. Included here are some sample forms:

# *Roman Catholic Diocese of Boise*

## **Supplemental Application Form Pastoral Associate**

Please complete this supplemental application in addition to the application for this position. If you need more room for a particular answer, you may complete the application in electronic form, or staple extra pages to the application, clearly marking the question you are answering.

1. What is your vision of the role of the Pastoral Associate?

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2. Tell us about your faith journey, and how that faith journey would help you in your role as Pastoral Associate.

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3. Describe the experience you have had in parish-based ministry in Idaho. If you have not had any experience in Idaho, describe your experiences in parish-based ministry elsewhere, and describe your knowledge of Idaho and its Catholic population.

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4. Describe your formal education, indicating schools attended, programs completed and degrees received, and describe how that education will assist you in your ability to perform the duties of Pastoral Associate.

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5. Describe any leadership roles you have held in the past. What is your greatest challenge in a leadership role? What has been your greatest success in a leadership role?

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## *Roman Catholic Diocese of Boise*

6. What is your leadership style, and how would that style help you in this position?

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7. What ideas do you have for motivating others to assist in accomplishing ministry goals?

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8. Describe your experience in establishing, planning, and working within a budget.

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9. What is your view of collaborative leadership? What is your view of consultative leadership? How are the two concepts different? How would you use those concepts in developing this ministry?

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10. Describe any experience you have in long range planning, and indicate how that experience would assist you in this ministry.

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11. Indicate whether you are bilingual, what languages you speak, and how you acquired the ability to speak other languages.

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*Roman Catholic Diocese of Boise*

12. Describe your experience in organizing and planning social and service oriented activities.

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13. Describe your public speaking experiences. How would you rate your ability to communicate with a large group? What style of communication do you tend to use in such settings?

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14. Describe your background in Catholic theology, and explain how that background would assist you in this position.

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15. When and where were you:

Baptized: \_\_\_\_\_ Confirmed \_\_\_\_\_

16. If you are married, when and where were you married?

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17. How do you manage conflict?

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18. If confronted by a colleague who is critical of a decision that you have made, how do you react?

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***Roman Catholic Diocese of Boise***

19. What portions of your education were most interesting to you and why?

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20. Why do you want to apply for this position?

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Name: \_\_\_\_\_ Date: \_\_\_\_\_

# *Roman Catholic Diocese of Boise*

## **Supplemental Application Form DRE**

Please complete this supplemental application in addition to the application for this position. If you need more room for a particular answer, we prefer that you complete the application in electronic form, or clearly mark the question you are answering and staple extra pages to the application. This application form is available on line by e-mailing (parish e-mail address).

### **Leadership**

1. Based on a review of the job description, and your knowledge of catechesis and faith formation, what is your vision of the role of the Director of Religious Education?

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2. Describe the experience you have had in leading religious education programs, and indicate how that experience will assist you in guiding this parish's religious education or faith formation programs.

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3. What has been your greatest challenge in a leadership role? What has been your greatest success in a leadership role?

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4. What is your leadership style, and how would that style help you in this position?

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5. What is your view of collaborative leadership? Describe how you would interact with parish staff in coordinating faith formation programs.

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## *Roman Catholic Diocese of Boise*

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### **Spiritual**

6. Tell us about your faith journey, and how that faith journey would help you in your role as Director.

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7. Describe your background and studies in Catholic theology, and explain how that background and knowledge would assist you in this position.

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### **Financial**

8. Describe your experience in establishing and planning a budget.

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9. Describe any experience you have in long range planning, and indicate how that experience would assist your role as Director.

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### **Communication**

10. Indicate whether you are bilingual, what languages you speak, and how you acquired the ability to speak other languages.

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## *Roman Catholic Diocese of Boise*

11. Describe your public speaking experiences. How would you rate your ability to communicate with a large group? What style of communication do you tend to use in such settings?

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### **Conflict Management**

12. How do you manage conflict? Describe an example of how you have managed conflict in the past.

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13. If confronted by a colleague or parent who is critical of a decision that you have made, how do you react?

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### **General**

14. Why do you want to apply for this position?

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Name: \_\_\_\_\_ Date: \_\_\_\_\_

## *Roman Catholic Diocese of Boise*

### **D. Guidance on Letters of Reference**

While letters of reference can be helpful in identifying strengths and weaknesses of particular candidates, they should not be used as substitutes for actually checking references. Be cautious of letters of reference, because they tell the employer what the candidate wants the employer to hear, and do not necessarily tell you what you need to know about a candidate. In addition, a letter writer may pick words very carefully to avoid revealing information that may be damaging to a candidacy. By speaking with the individual in person, and, in person, hearing the tone of voice and words used extemporaneously, in response to specific questions, you can get a much better feel for the reference's openness, and thus you will be better able to determine whether this candidate will fit your needs.

### **Reference Checking**

Before hiring an individual, the parish/school should use their best efforts to check references of the individual being considered. In checking references, ask questions to gather information that will allow you to verify what the applicant has told you. Thus, in checking references, you are seeking information on the applicant's qualifications, and also on their behavior, attitude, personal characteristics, etc. You are also checking to make sure that they have accurately represented their experience, education and qualifications. A form that can be used for this purpose is on the next page.

#### **1. Legal Issues Relating to Reference Checking**

In recent years, some employers have been reluctant to provide more than limited information about a former employee, because of a fear that they could be sued if the applicant is not hired, because of a negative reference. Thus, many employers adopted a policy of providing only verification that the person was employed, dates of employment and the job position held. This information is not helpful in most circumstances. In Idaho, the fear of a lawsuit arising out of a reference has been lessened somewhat, because the Idaho legislature passed a law that provides immunity to employers providing references for former employees. If the employer provides truthful information in response to a request, and does not act maliciously to try to injure the former employee, then the employer cannot be sued for providing the information.

Because some employers still remain reluctant to provide relevant information, it may be necessary to obtain a release from the applicant, in written form, to provide to the former employer. This will provide the former employer with an assurance that there will be no repercussions based upon their reference. A form for this purpose is also included on the next page.

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**2. Reference Checking Form**

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Reference Checking Form**

**Candidate Name:** \_\_\_\_\_

**Position Applied for:** \_\_\_\_\_

**Reference Name/Number:** \_\_\_\_\_

**Dates of Employment/Relationship:** \_\_\_\_\_

**Position Held:** \_\_\_\_\_

**Candidate's Reason for Leaving:** \_\_\_\_\_

**Describe the position/job functions for which the candidate was responsible:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Describe the candidate's relationships with co-workers, subordinates, superiors, peers, etc.** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**What are the candidate's greatest strengths?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**What are the candidate's greatest weaknesses?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Roman Catholic Diocese of Boise*

**Would you rehire this person?**

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**Additional information obtained from this reference:** \_\_\_\_\_

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**Date reference was checked:** \_\_\_\_\_

**Person Checking Reference:** \_\_\_\_\_



## *Roman Catholic Diocese of Boise*

### **E. Interviewing Applicants**

The top applicants for each position should be personally interviewed. The hiring committee can choose to interview the top candidate, the top two, or any number of the top candidates. Those selected for interview can be selected before or after references are checked.

#### **1. What Questions Are Illegal?**

Because of federal discrimination laws, some questions simply cannot be asked of job applicants, because the questions themselves are illegal. Examples of illegal questions include:

- Do you have a disability?
- Do you have a medical condition that will keep you out of work?
- How many days were you sick last year?
- Do you need any physical accommodations to perform this job?
- Is there any medical reason why you cannot work?
- Are you currently taking any medications?
- How much alcohol do you drink?
- Are you an alcoholic?
- Have you ever filed a workers compensation claim?
- Have you ever been addicted to illegal drugs?
- Have you ever sought psychological treatment?
- Are you in good health?
- Have you had any major illnesses in the last year?
- Are you now or are you planning to get pregnant?
- What is your age (except to assure that a young person is at least old enough to perform the job, i.e., 16 or 18 or 21)?

Questions that may elicit information about a “disability” are especially troublesome, as it is not always clear what kinds of questions might be illegal. In addition, courts have imposed legal liability on organizations for asking illegal questions, even where the organization can prove that the reason the applicant was not hired was unrelated to disability! Here are some examples of ways that a question can be asked legally, and ways that seeking the same information could create legal liability:

## *Roman Catholic Diocese of Boise*

<b>WHAT YOU CAN ASK</b>	<b>WHAT YOU CANNOT ASK</b>
Can you perform all of the job functions, with or without accommodations?	<u>Will you require an accommodation to perform the job functions?</u>
Describe how you would perform the job (Must be asked of all applicants in the job category, unless applicant has a known disability)	Describe how you would perform the job (if <u>only asked of a particular applicant</u> )
We require attendance with no more than three absences a quarter, Can you meet those requirements?	Do you have a <u>medical condition</u> that would prevent you from meeting attendance requirements?
How many days were you absent from work last year?	How many days were you <u>sick</u> last year?
Do you have all the required certifications and licenses?	Is there a <u>medical reason</u> why you would not be able to secure applicable licenses?
Are you currently using illegal drugs?	Are you currently taking <u>prescription medications</u> ?
Do you use alcohol?	<u>How much</u> alcohol do you use?
Have you ever used illegal drugs?	Have you ever been <u>addicted</u> to illegal drugs?
Do you handle stress well?	Has stress ever caused you to be <u>ill</u> or seek <u>psychological treatment</u> ?
We have strict safety rules, can you follow them?	Have you ever filed a workers compensation claim?
Have you ever been disciplined for tardiness?	Have you ever suffered from one of the following <u>illnesses</u> ?
Do you get along well with co-workers? How do you work in a competitive environment?	Have you ever been <u>treated by a psychiatrist or a psychologist</u> ?
Explain any periods of unemployment.	Are you in good <u>health</u> ? Have you had any <u>major illnesses</u> in the past five years?

The underlined words in the second column are the words that make the question illegal. In most cases, it is better to avoid asking health related questions at all, rather than risk asking an illegal question inadvertently. When questions are asked, they should inquire about the abilities of the applicant, not the disabilities.

Other questions are not per se illegal, but could be troublesome if asked in the wrong way, or if the information gathered is used to screen out applicants in a way that is discriminatory. Some examples are:

- What is your marital status? How is your husband employed?
- What are your child care arrangements?
- How many children do you plan to have?
- What is your height or weight (where not related to job requirements)?

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- What year did you graduate from high school?
- Have you ever been arrested?
- Have you ever filed for bankruptcy?
- Do you speak fluent English (or Spanish) (when the position does not require it)?

If an applicant offers information on any of the above topics, without a question being asked, the interviewer should simply take down the information, but not inquire further. Document the fact that the information was freely provided by the applicant, without a question being asked.

### **2. Recordkeeping**

Good records should be kept of the information gathered and discussed during the recruiting process. This includes the interview with each applicant. A form for keeping notes is included below. It is important to keep good notes, not only to recall the information when the decision is being made, but also to keep a record of exactly what was said, in case any question arises about why the applicant was not hired.

#### **INTERVIEW NOTES**

Candidate: \_\_\_\_\_

Date: \_\_\_\_\_

Those present at the interview: \_\_\_\_\_

Notetaker: \_\_\_\_\_

Notes: \_\_\_\_\_

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You can also use a prepared set of questions, and take notes using the written questions, and each candidate's answers to those questions. Using a set of prepared questions allows you to compare answers of each candidate to the same question. A prepared set of questions also allows you to avoid the illegal questions noted above.

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### **3. Interview Do's and Don'ts**

Here are some tips on effective interviewing:

- ✓ Ask questions that are open ended and require the applicant or employee to compose an answer that is meaningful. Examples include: "Tell me about a time when you were successful in completing a project," instead of "Have you ever been successful in completing projects?" or "What was your attendance record at your last job," instead of "Did you have good attendance?"
- ✓ Ask who, what, when, why and how questions.
- ✓ Ask questions that relate to the specific job duties, such as "Tell me how you would address conflict among your catechists" or "What things have you done this year to increase the volunteers in your program?"

There are certain types of questions to avoid. These include:

- ✓ Questions that rarely produce a truthful answer, like: "How did you get along with co-workers?" The answer will almost always be "Great!"
- ✓ Leading questions that suggest the answer you want to hear, such as "You like to talk to people, don't you?"
- ✓ Illegal questions. Some are mentioned above.
- ✓ Obvious questions where the answer is already in the application information, or in the employee file information.
- ✓ Questions that are not job related, such as "Where does your family come from?"

These types of questions most often contain some element of discrimination, and the lack of job relatedness makes it hard to justify asking them.

### **4. Sample Interview Questions-Youth Minister**

While each circumstance is unique, and questions in an interview must be geared to the position you are seeking to fill, here are some ideas for the types of questions that might be asked in an interview for a coordinator of youth ministry:

- ✓ What motivated you to apply for this position?
- ✓ Why do you think you would be the right person for this position?
- ✓ What do you believe are the greatest needs of our youth today?
- ✓ What experience do you have in youth ministry?
- ✓ Describe what you envision you would be doing in your first three months on the job.
- ✓ Vision and forward planning is very important in youth ministry, where do you see this ministry going in one, three and five years?
- ✓ You cannot do this ministry alone, sometimes an army of volunteers is needed. How would you organize and recruit volunteers, and get them to buy into your vision of youth ministry?
- ✓ The hours worked by a youth minister are very different from a typical 9-5 job. How would you establish accountability with the parish when you work odd hours?

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- ✓ Our youth are a very diverse group of people. How do you effectively minister to such a diverse group?
- ✓ A good coordinator is a special person with many intangible qualities that cannot be determined from a written application. What intangible qualities do you possess that make you the right candidate for this position?
- ✓ Who are you spiritually, socially and emotionally?
- ✓ Do you have experience in working with computers and databases?
- ✓ Do you have any experience in dealing with confidential information, and how do you handle that?
- ✓ What is your experience in working with budgets?
- ✓ What would be the most difficult aspect of this job for you?
- ✓ What are your strongest youth ministry skills?
- ✓ Are there aspects of youth ministry where you feel you still need further training, experience or practice?
- ✓ Describe a “success” you have had in youth ministry.
- ✓ Describe a challenge you have had in youth ministry.
- ✓ How do you help teens grow in faith?
- ✓ How would you minister to parents and families of teens?
- ✓ How would you develop a system to assure that your core team of youth ministers has an adequate grasp on religious teaching of the Catholic Church?
- ✓ How would you develop the program of spirituality for the teens?
- ✓ Give some examples of projects where you were highly motivated, and explain how your motivation assisted you in completing that project?
- ✓ What would you do if: (1) a teen came to an activity drunk or high; (2) attendance at programs declined dramatically; (3) a core team member failed to carry through on a commitment; (4) a group of parents demanded the end of any sex education aspect of the program; (5) one of your adult volunteers was accused of abusing a teen; (6) a parish teen was killed in a car accident; (7) there was a conflict on your core team; (8) a teenager confided to you that she/he was thinking about suicide? (9) you are confronted by an angry parent over a program issue?
- ✓ How would you keep from burning out on youth ministry?
- ✓ Why are you leaving your current position?
- ✓ Have you been terminated from any previous positions, and if so, why?
- ✓ How do you stay current with the trends in youth ministry?
- ✓ What have you done in the last year to continue your learning or education?
- ✓ How would you describe your work style and work ethic?
- ✓ Is there anything else you would like the hiring committee to know?

### **5. Sample Interview Questions-Pastoral Associate**

While each circumstance is unique, and questions in an interview must be geared to the position you are seeking to fill, here are some ideas for the types of questions that might be asked in an interview for a pastoral associate:

- ✓ What motivated you to apply for this position?
- ✓ Why do you think you would be the right person for this position?

## *Roman Catholic Diocese of Boise*

- ✓ What do you believe are the greatest needs of our parishes today?
- ✓ What experience do you have in this type of ministry?
- ✓ Describe what you envision you would be doing in your first three months on the job.
- ✓ Vision and forward planning is very important in parish ministry, where do you see this ministry going in one, three and five years?
- ✓ The hours worked by a pastoral associate may be very different from a typical 9-5 job. How would you cope with the odd hours? How would you establish accountability with the parish leadership when you work odd hours?
- ✓ Parishioners are a very diverse group of people. How do you effectively minister to such a diverse group? How would you call forth the gift of parishioners very different from yourself?
- ✓ A good pastoral associate is a special person with many intangible qualities that cannot be determined from a written application. What intangible qualities do you possess that make you the right candidate for this position?
- ✓ Who are you spiritually, socially and emotionally?
- ✓ Do you have experience in working with computers and databases?
- ✓ Do you have any experience in dealing with confidential information, and how do you handle that?
- ✓ What would be the most difficult aspect of this job for you?
- ✓ What are your strongest ministry skills?
- ✓ Are there aspects of your ministry where you feel you still need further training, experience or practice?
- ✓ Describe a “success” you have had in ministry at a parish.
- ✓ Describe a challenge you have had in ministry at a parish.
- ✓ How do you help parishioners to grow in faith?
- ✓ How would you minister to parents and families?
- ✓ What would you do if: (1) [fill in blanks with possible scenarios that the pastoral associate might face]?
- ✓ How would you keep from burning out on ministry?
- ✓ Why are you leaving your current position?
- ✓ Have you been involuntarily terminated from any previous positions, and if so, why?
- ✓ How do you stay current with the trends in parish ministry?
- ✓ What have you done in the last year to continue your learning or education?
- ✓ How would you describe your work style and work ethic?
- ✓ Is there anything else you would like the hiring committee to know?

### **F. Evaluating Applicants**

When evaluating applicants, be aware of your own biases in assessing qualifications and “fit” for the position. Review some of the information included in this Manual in the section relating to Performance Evaluations and appraiser “bias” to determine if subconscious bias is affecting the decision-making process. In addition, be aware of the following issues:

- **Bilingual Applicants:** If you are seeking applicants that are bilingual English/Spanish, you may seek applicants with that preference, however, you cannot advertise in a way that restricts the applicant pool to those of a certain national origin,

## *Roman Catholic Diocese of Boise*

nor can you include such considerations in the interview sessions. Such an approach would be unlawful national origin discrimination. Thus, an appropriate ad could indicate: “Bilingual English/Spanish preferred (or required)” but should not say: “Seeking Hispanic for parish position.” The same is true for questions asked during the interview process.

- **Applicants with a Criminal Record:** Some parishes have been approached to hire individuals recently released from jail or prison, with the hope that an employment position would assist the individual with rehabilitation. Parishes are not prohibited from asking about the criminal record that resulted in imprisonment. Once the criminal record is disclosed, it should be used to exclude the individual from employment only if it is related to the position for which the individual will be hired. Thus, if you are hiring for a bookkeeper position, it is permissible to exclude someone who has been convicted of embezzling funds from a previous employer. Once the person is hired, the Diocese will perform a criminal background check, and if any convictions appear that compromise Safe Environment, the applicant will be excluded from employment. A copy of the protocol used by Human Resources to assess the applicant’s criminal record is included in the Appendix. That protocol indicates which charges on an applicant’s record will disqualify the applicant, or require further inquiry.
- **Pregnant Applicants:** Women cannot be excluded from positions because they are pregnant. If an applicant is qualified for the position, and would be hired if it were not for the pregnancy, it would be illegal discrimination to refuse to hire for that reason. In addition, questions about plans for pregnancy or child bearing should not be asked during the interview process.
- **Favoring based on gender:** Well meaning parishes may feel that a person of one gender or another should be hired for particular positions. For example, the parish may decide that since there are no men on staff, the next position should go to a man, or vice versa. Favoring applicants solely based on gender is also illegal. Thus, any decisions made on hiring should be directed to selecting the most qualified applicant regardless of gender.
- **Favoring because of youth:** Another area that should be avoided during the hiring process is the reliance on the age of the applicant. Parishes cannot favor an applicant who is younger, simply because of age. Thus, if a person applies for a position as coordinator of youth ministry, that person cannot be excluded from consideration because he or she is over 40 years of age. However, parishes can consider whether the individual is “qualified” for the position, which can include an ability to understand the needs of youth, and an ability to relate well to the concerns and energies of the youthful population. In considering those factors, parishes cannot rely simply on assumptions or biases, but instead must truly explore the qualifications of the individual in those areas before making any decisions on hiring.

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### **1. Applicant Evaluation Process**

During the interview process, the selection team must have a method by which it can analyze the characteristics of the various applicants. Thus, it is often helpful to have some kind of form, with the important hiring criteria identified, where members of the search committee can “rate” their view of the applicant’s qualifications against the necessary criteria. When reviewing applications, each member of the search committee can then independently rate the candidates, and then the committee as a whole can compare their scores, rank applicants, and then determine which candidates should be interviewed. Some examples of application evaluation forms are included on the next page.

# *Roman Catholic Diocese of Boise*

## Applicant Evaluation Form I

Name \_\_\_\_\_

Position \_\_\_\_\_

<b>CATEGORY</b>	<b>MEETS MINIMUM</b>	<b>ABOVE MINIMUM</b>	<b>EXCELLENT</b>
Active Catholic			
College Education			
Additional Training/Certificates/Theology			
Experience in [Adult, Youth, etc.] Ministry			
Experience in Other Types of Parish Ministry			
Program Development Experience			
Event Coordination experience			
Enthusiasm for Ministry			
Experience in Outreach ministry			
Personal characteristics such as motivation, energetic, organized, hard working			
Leadership skills			
Public presentation experience			
Communication skills			
Computer skills			
Interpersonal skills			
Emotional stability			
Bilingual/bicultural			
Commitment to formation			

Additional comments:

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***Roman Catholic Diocese of Boise***

**Applicant Evaluation Form II**

Candidate: \_\_\_\_\_

Minimum Qualifications:

Catholic: \_\_\_\_\_  
Minimum Education: \_\_\_\_\_  
Minimum Experience \_\_\_\_\_

Based on the paper application, rate the candidate in the following areas:

Educational Background	1	2	3	4	5	6	7	8	9	10
Experience	1	2	3	4	5	6	7	8	9	10
Spiritual Leadership	1	2	3	4	5	6	7	8	9	10
Commitment to Ministry	1	2	3	4	5	6	7	8	9	10
Understanding of Position	1	2	3	4	5	6	7	8	9	10
Leadership	1	2	3	4	5	6	7	8	9	10
Collaboration Skills	1	2	3	4	5	6	7	8	9	10
People and Interpersonal Skills	1	2	3	4	5	6	7	8	9	10
Communication Skills	1	2	3	4	5	6	7	8	9	10
Conflict Resolution Skills	1	2	3	4	5	6	7	8	9	10
Vision	1	2	3	4	5	6	7	8	9	10
Other qualities chosen by Search Team	1	2	3	4	5	6	7	8	9	10

Total: \_\_\_\_\_

Other comments: \_\_\_\_\_

Once the Search Committee has evaluated the applicants, and determined whether they meet the qualifications required, it is often helpful to rank the applicants to determine the top candidates. This can be done before an interview process, and again after the interview process is completed. A form for completing such a process is included below, along with an example of how the form can be completed by Search Committee members so that it provides useful information.

*Roman Catholic Diocese of Boise*

**Search Committee Applicant Ranking Form**

**Position:** \_\_\_\_\_ **Reviewer:** \_\_\_\_\_

<b>Ranking</b>	<b>Applicant</b>	<b>Reasons for Ranking</b>
1		
2		
3		
4		
5		
6		
7		
8		
9		
<b>10</b>		

## *Roman Catholic Diocese of Boise*

### **Search Committee Applicant Ranking Form (Sample for Coordinator of Youth Ministry Position)**

**Position:** \_\_\_\_\_ **Reviewer:** \_\_\_\_\_

Ranking	Applicant	Reasons for Ranking
1	Name	<b>Background in Youth Ministry; Experience with youth programs; Theology education; Degree in Psych, Masters in Special Ed.; Employed in Parish Ministry (YM, PA for FF); excellent skills</b>
2	Name	<b>Background in YM as volunteer; Bachelors in History; six years religious training; background in youth programs; excellent leadership and communication skills; all other criteria exists</b>
3	Name	<b>Formal theology training with religious order; worked in Campus ministry, worked in youth ministry</b>
4	Name	<b>Bachelors in Journalism; some theology courses in college; no formal theology training; volunteer experience in parish based programs (YM) and Catholic Charities; excellent skills</b>
5	Name	<b>Bachelors in sociology/criminal justice; some theology classes in college; Experience as youth volunteer; never employed in parish ministry; some good skills</b>
6	Name	<b>BS criminal justice/MBS HR; no theology training; volunteer experience in evangelization; good skills outside of ministry positions</b>
7	Name	<b>BFA; some volunteer experience in teaching confirmation, no theology or other training; poor application</b>
8	Name	<b>No degree; no theology training; experience as volunteer in child programs only</b>
9	Name	<b>Resume only-no application</b>
10	Name	<b>Resume only-no application</b>

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### **Applicants who were not chosen**

Applicants who were not chosen should be contacted as a courtesy, to inform them that the position has been filled. Below is a form letter that can be modified to meet the circumstances of each parish position. Do not make these contacts until after you are sure that the top candidate will accept the position.

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#### ***Applicant Letter-Applicant not Selected - No Interview***

[DATE]

[NAME AND ADDRESS]

Re: Application: [POSITION]

Dear [NAME]:

I wanted to take this opportunity to thank you for your interest in the above position and the effort you exhibited in applying. [PARISH] greatly appreciates receiving your application and having the opportunity to review your interest and qualifications. Regretfully, I am writing to inform you that your name was not forwarded to the hiring committee for interview for the position. Thanks again for your interest in the Diocese of Boise.

Very Truly Yours,

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## *Roman Catholic Diocese of Boise*

### **5. Hiring Practices**

The selection process for hiring new employees involves making an informed decision about which candidate meets the qualifications and has the highest possibility of success in the position. If making the correct decision requires extra time, then that extra effort should be taken, to avoid decisions that will create problems through hiring an employee who will not be successful in the position. In addition to taking care to make a good decision, there are also some general practices that should be avoided:

- Do not contact an applicant's present employer without permission. It would be unfair to interfere with the applicant's current employment without necessity. There is a question on the form application for permission to contact the current employer. Once a tentative decision has been made concerning your top applicant, permission can be sought at that time to contact the employer. Once the applicant knows that they have a good chance at being selected, they are generally less reluctant to allow their employer to be contacted. On the other hand, a final offer to the applicant should not be made without such permission, and an assurance that the reason the applicant is leaving their current position does not involve performance or behavior issues that might mean the applicant would not be successful in the parish position.
- When selecting applicants for the position, do not rely on criteria different than those advertised for the position, without giving applicants an opportunity to demonstrate how they meet the criteria.
- When conducting interviews, avoid discussing the quality of the candidates and preferences before interviewing the last candidate. Try to avoid drawing conclusions about who will be hired until the final interview is completed. This allows everyone a fair chance to compete for the position. However, this does not mean that a parish could not decide to conclude interviews without interviewing all of the candidates. If an interview is conducted with a candidate who is simply a stellar choice, and it is clear that this person will be the final choice, the committee can choose to conclude interviews at that point, but remaining candidates should not be required to complete the interview if they are not being given a chance to compete.

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### **A. Applicant Letter-Applicant Not Selected-Post Interview**

[DATE]

[Name and address]

Re: [position]

Dear [NAME]:

I wanted to take this opportunity to thank you for your interest in the above position and the effort you exhibited in applying. The Diocese of Boise [and/or parish/school] greatly appreciates receiving your application and having the opportunity to review your interest and qualifications. The search committee also enjoyed discussing with you your qualifications, your vision, and your interest in this position. The quality of applicants such as yourself made it very difficult to choose a candidate for this position. Regretfully, I am writing to inform you that another applicant has accepted the position. Thanks again for your interest in the Diocese of Boise [and/or parish or school].

Very Truly Yours,

[Department Director/Parish Leader]

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### **B. Making an Offer**

For the candidate who is selected, the hiring authority (pastor, parish life director or principal) should make the employment offer. This offer can be made orally, but should be followed up with a letter outlining the details of the offer of employment. No promises should be made to the candidate that is inconsistent with Diocesan policy.

### **C. Offer Letters**

An offer letter is a document which can be evidence of a contractual agreement between the parish/school and the employee. Thus, care should be taken to assure that nothing is said in the offer letter that is contrary to Diocesan policy, or that binds the parish/school to employment terms that were not intended. Thus, the offer letter should:

- (1) NOT promise a specific duration of employment.
- (2) Identify the position for which the individual is hired.
- (3) Incorporate the Diocesan personnel policies.
- (4) Indicate that the offer is contingent upon successful completion of the Diocesan criminal background check.

A sample letter is included below.

# *Roman Catholic Diocese of Boise*

## *Sample Offer Letter*

[Date]

[Name]

[Address]

Re: Offer of Employment as [position]

Dear [Applicant]

On behalf of the [parish/school] I am pleased to offer you the position of [title]. I am excited about the opportunities that exist for you in this new adventure, as well as the fruits your work will bear for our parish. I enclose the job description. In this capacity, your salary will be \$[???] per year. Direct supervision in this position will be provided by myself [or other].

This position requires that you successfully complete a criminal background check. I also enclose a copy of disclosure and release forms. This offer is contingent upon successful completion of this check. Return these forms to me as soon as possible. This position is also subject to all of the existing Diocesan policies, including the Diocesan Personnel Policies, and the Diocesan Sexual Misconduct policies.

A summary of the benefits available to you is enclosed with this letter, along with forms to complete and return to the Department of Finance, Diocese of Boise, 1501 S. Federal Way, Ste. 400, Boise, ID 83705. Those forms must be returned as soon as possible.

We look forward to your acceptance of this offer, as well as a rewarding experience through our collaboration.

[Signed by pastor/hiring authority]

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### **D. The Immigration Reform and Control Act**

A federal law, the Immigration Reform and Control Act, prohibits employers in the United States from hiring individuals who do not have the legal right to work in this country. However, the act also prohibits discrimination against those who are from other countries. Because of this law, it is unlawful for a parish/school to hire a person who is not able to prove that they are legally entitled to work in this country. To show compliance with this law, the federal government requires the employer to verify the individual's eligibility to work in this country. This must be done within three days of beginning work. A form (I-9) is provided by the government for keeping a record of this verification. Instructions are provided with the form. The form and the instructions are included in the Appendix. Additional copies are available from the Finance Office or the Human Resources Office.

### **6. Criminal Background Checks**

Those hired to work anywhere in the Diocese of Boise, including at parishes/schools, are required to submit to a criminal background check. For parish/school employees, this check is completed through the Diocesan Human Resources Department. Information provided on the forms is kept confidential by the Human Resources department, unless a criminal record is discovered, in which case the protocol outlined below will be followed. Forms for the criminal background check are included in the Diocesan Parish and School Safe Environment Manual. Additional forms can be requested electronically from Eleanor E. Smith, Administrative Assistant, [esmith@rcdb.org](mailto:esmith@rcdb.org). These forms must be completed by the employee and sent to the Human Resources office as soon after hire as possible.

If a criminal record is revealed, further steps will be taken according to the following protocol.

#### **Roman Catholic Diocese of Boise “Protocol for Criminal Background Checks”**

It is the intent of the Diocese that a background check is completed and approved prior to the hiring or utilization of any individual working in an environment engaging children or vulnerable adults. Confidentiality will be maintained throughout the process.

1. If the criminal records check reveals a criminal record, the Human Resources office will first review the information to assure that the identified defendant is the same person as the employee/volunteer. If there is no match, that conclusion will be documented.
2. If it appears that the criminal record belongs to the person who is serving as an employee/volunteer, the records will be reviewed to determine what type of offense is reflected, and whether there was a finding of guilt.
3. When the defendant has been charged with any of the following offenses or similar offenses, further inquiry will be necessary, as noted in section 4:

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- A. Aggravated assault of a minor
  - B. Aggravated battery of a minor
  - C. Injury or death of a minor
  - D. Abuse of a minor, including sexual or physical
  - E. Sexual exploitation of a minor
  - F. Possession of (child) pornography
  - G. Lewd conduct with a minor
  - H. Enticing of a minor
  - I. Sexual battery of a minor
  - J. Sale or barter of a minor
  - K. Murder of a minor
  - L. Kidnapping or abduction of a minor
  - M. Importation or exportation of a minor for immoral purposes
4. For the offenses listed in section 3, the employee/volunteer will be notified that a record has been discovered in their criminal background check. He/she will be given an opportunity to offer explanation, including information that would certify that he/she is not the defendant in the criminal action. If the information provided indicates that he/she is guilty of one of the offenses listed in section 3 then the employee/volunteer will not be allowed to work in diocesan, parish or school programs until the situation is reviewed by the Bishop or his designee, and a final decision is made about employment/volunteer status. If the Bishop determines that the candidate is eligible for an employment or volunteer position, the Bishop retains the right to notify any supervisor of the future employee/volunteer about background information.
5. When the defendant has been charged with any of the following offenses or similar offenses, further inquiry will be required as noted in section 6.
- a. Misdemeanor assault
  - b. Misdemeanor battery
  - c. Domestic assault or battery
  - d. Malicious harassment
  - e. Stalking
  - f. Driving under the influence
  - g. Violation of substance abuse laws
  - h. Selling or providing alcohol to a minor
  - i. Encouraging violations of the Juvenile Corrections laws
  - j. Reckless driving
  - k. Armed robbery
  - l. Trespassing
  - m. Driving without privileges
  - n. Other offenses that might interfere with employment obligations

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6. For the offenses listed in section 5, the employee/volunteer will be notified that a record has been discovered in their criminal background check. He/she will be given an opportunity to offer explanation, including information that would certify that he/she is not the defendant in the criminal action. If the information provided indicates that he/she is guilty of one of the offenses listed in section 5 and/or the offense, and circumstances surrounding the offense, indicates a potential danger in working with minors or vulnerable adults, then the employee/volunteer will not be allowed to work in diocesan, parish or school programs until the situation is reviewed by the Bishop or his designee, and a final decision is made about employment/volunteer status. If the Bishop determines that the candidate is eligible for an employment or volunteer position the Bishop retains the right to notify any supervisor of the future employee/volunteer about background information.
7. In all matters relating to this protocol, the Bishop may consult with the Diocesan Sexual Misconduct Review Board.
8. All records regarding criminal background checks conducted on employees and volunteers are securely kept in confidential files in the Diocesan Human Resources office. This includes forms filled out by employees and volunteers providing personal information. Accesses to such files is restricted to the Bishop/Vicar General, and select employees of the Human Resources department, unless prior permission for access, based on a need to know, is granted by the Bishop.

*Revised: December 7, 2007*

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## **7. Contracts with Employees**

Diocesan policy stipulates that only the Bishop has the authority to approve contracts with employees. Thus, for any employee that requires a written contract, that contract must be approved by the Chancery office. If a parish/school has a circumstance where they anticipate requiring a written contract, the parish/school should contact the Vicar General or the Diocesan Director of Human Resources, early in the process, to discuss the circumstances and determine whether a written contract would be appropriate. Then, once a contract is agreed upon, it must receive final approval and signature from the Superintendent of Schools as the Bishop's designee.

## **8. The Orientation Process**

A very important part of making a new employee feel welcome is orienting them to their new position, their new environment, and the work rules applicable to their new position. Thus, parishes/schools should use an orientation process to provide new employees with the information that they need to begin performing their position. A checklist of items to consider and review with new employees is provided below:

### **ORIENTATION CHECKLIST**

#### ***Prior to the employee's arrival:***

- Send a confirming letter regarding the terms of the offer of employment (i.e., salary, benefits, etc.)
- Prepare the employee's work area, assuring that adequate supplies are available.
- Compile a packet of information that will be provided to the employee for review (which may be included in the offer letter), including:
  - ✓ A copy of the Diocesan Personnel Policies, plus an acknowledgement form;
  - ✓ Background check forms and information;
  - ✓ Employee Emergency Form;
  - ✓ A copy of any insurance or benefit information applicable to the employee;
  - ✓ A copy of the I-9 immigration form;
  - ✓ The job description; and
  - ✓ Any training information.
- Prepare the rest of the staff for the arrival of the new employee, notifying them of the arrival date, information about the new employee, information about what duties the individual will be performing, where the person will be located, and expectations of the existing employees in terms of welcoming or orienting the new employee.
- Tell the employee when and where to report and who will be available to orient the employee to their position.

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### ***When the employee arrives:***

- Provide a tour of the facilities and introductions to the key personnel.
- Provide a key to the facilities where the individual will need access.
- Provide any information regarding access (alarms, security procedures).
- Orient the employee to their work area, office or other supplies, kitchen access, rest rooms, procedure for breaks, lunches, etc.
- Review important information from personnel policies, and obtain an acknowledgement form from the employee (if not done prior to hire).
- Confirm that the employee has attended a safe environment workshop or will attend a workshop within 30 days.
- Review information concerning salary, paycheck distribution process, benefits, overtime policy, leave policy, vacation policy, sick leave policy, etc.
- Assure that the criminal background check has been completed prior to date of hire.***
- Assure that the Finance Office documents are completed (including the W-4, I-9, benefit enrollment forms, payroll change notices, etc.)
- Introduce the employee to co-workers.
- Review the job description, initial expectations, and any necessary work rules.
- Explain basic parish procedures for requesting leave, hours of work, notification of illness, etc.
- Explain the operation of parish equipment, such as copy machines, scanners, fax machines, computers, network, e-mail, telephone, long distance procedures, voice mail, postage meters and mail procedures, printers, etc.
- Arrange for business cards if necessary.
- Discuss dress code expectations.
- Explain procedures and locations of conference rooms, meeting rooms, and reservation system.
- Provide a Diocesan Directory, and a parish organizational chart, and explain parish/Diocesan structure, along with most important contact information.
- Provide a copy of the parish mission/vision statement, and any parish goals established in short and long term planning processes.
- Review the parish performance evaluation process.
- Discuss 90 day introductory period.

### ***As soon as hired before working with children:***

- Schedule the employee to attend a Safe Environment workshop.

### ***Two weeks after hire:***

- Check in with the employee to assure that all questions about work and the position have been answered.

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## **9. Job Descriptions**

Job descriptions are essential to providing a structure within which an employee can perform, and are thus essential to a valid performance management system. A job description provides the essential agreement as to what functions and duties a person holding a particular position will perform. Thus, a job description should be developed ideally before the incumbent is hired for the position. If a job description is developed while the job is filled, care should be taken to write the description to reflect what the job should include, and not simply how the incumbent performs the job. Thus, the analysis of a specific job will often require analysis of related jobs and the distribution of tasks among jobs. This analysis should include a study of the most effective way to accomplish certain tasks, and assign the tasks to the job position where it is most logically placed.

Because the parish/school is a church employer, the job description should also recognize that there is not simply a “job” function to the particular position, but also a “mission” to the ministry performed, and this mission should be consistent with the vision of the ministry provided. Even clerical and administrative positions are a ministries contributing to the overall well-being of the parish’s/school’s overall mission. The descriptions should be written with this thought in mind, and, if possible, articulate the position’s relationship to the overall ministry of the parish.

Certain essential elements must be included in each job description, including:

- (1) Identification of the job, which includes a job title, exempt/nonexempt status, reporting relationships, etc.
- (2) General summary of vision for the ministerial position, the reason the job exists (its definition) and a general description of the duties performed.
- (3) Required education and experience.
- (4) Required knowledge, skills and abilities.
- (5) Required personal characteristics.
- (6) Essential duties and responsibilities.

A sample template for creating a job description is included in Appendix A – Job Descriptions, along with sample job descriptions for many parish/school positions. These sample job descriptions should be tailored to the specific parish circumstances. If there is an incumbent in the position at the time the job description is being written, it may also be helpful to have that person complete a written position analysis, describing their position and the major functions of the job. While this information should not be the sole basis for drafting a job description, since the supervisor’s input is also important, it can be very helpful in drafting an accurate description. A sample form for a position analysis is included in Appendix A – Job Descriptions.

In writing the section on knowledge, skills and abilities, care should be taken to assure that the knowledge, skills and abilities (KSAs) necessary for successful performance of the

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position are included, NOT simply the KSAs of the incumbent. If the position is a supervisory position, then essential skills and abilities should include managerial skills.

In writing the essential duties section, care should be taken to assure that ALL duties are included. In addition, the job description should list the duty to be performed, as well as how often it is performed. Care should be taken to assure that the job description also includes all responsibilities, whether the incumbent is the person actually completing the task or not. For example, a manager might have oversight responsibility for the administration of the religious education program, but another person is assigned to carry out the day to day functions of that program. This would be a distinction, for example, between the Director of Religious Education, and the Coordinator of Adult Education or Youth Ministry, for example. The language describing the duties should make these essential distinctions.

*Questions to ask when drafting a job description:*

- ✓ Does the job description reflect what the job is really all about? Are there activities being performed that are not in the job description? Are there activities in the job description that are not being performed by this person, and if so, is it because those duties have shifted to someone else, or that this person does not have time to perform them? If the latter, should those job duties be retained as part of the long term planning and goal setting for this position, or should they be eliminated as unreasonable expectations?
- ✓ What are the key responsibilities of this position?
- ✓ What are the goals/targets for this position? (See section on goal setting)
- ✓ Is the job realistic in terms of expectations?
- ✓ Does the job fit in the way it is structured? How does it relate, in the organizational chart, to other positions in the parish?
- ✓ If you were starting over, without an incumbent in the position, would you create the same position or would you change it?
- ✓ Make sure the description contains all of the suggested elements, as noted in the sample job descriptions included with this Manual.

A way to focus your discussion about the job description may be to ask the following questions:

- ✓ What are the top three priority goals for this position in the next year? The next three years? The next five years?
- ✓ What responsibility does this person have with respect to those goals? Sole responsibility? Responsibility for recruiting volunteers to accomplish the goals?
- ✓ Is the role of this person mainly: (1) administrative; (2) a resource person for others; (3) supervisory; (4) direct service (teacher, music minister, etc.)
- ✓ Is this position temporary or long term?
- ✓ What responsibility will this person have for financial issues, including budget formulation?

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- ✓ Will this person have assistance on administrative tasks, and what types of administrative tasks will be necessary to accomplish the goals? What individuals/resources/space will be required to accomplish this position?
- ✓ What type of collaboration with others on staff will be required?
- ✓ What kind of supervisory skills are necessary?
- ✓ What kind of reporting will be necessary, i.e., monthly reports to parish leader/principal, interaction with parish/school boards, etc.?
- ✓ Will this position be required to train volunteers?
- ✓ What types of criteria will be used to assess performance in this position? (Attendance at programs, financial support, feedback, enthusiasm, increased program involvement, community building, program development, etc.)
- ✓ What kinds of professional development will this position require?

### **10. Required Postings and Notices**

Certain information is required, by federal and state law, to be posted in the workplace. The following postings are required:

1. Equal Employment Opportunities (EEO) (federal discrimination)
2. Family Medical Leave Act (FMLA)
3. Minimum Wage (federal and state)
4. OSHA
5. Employee Polygraph Protection Act

Often, a parish will receive a mailing from a private company indicating that the parish should purchase the above posters for a fee. All of the posters required to be posted are available free of charge from the federal or state government. The Human Resources office is providing the following e-mail address' where you can copy these posters for free, <http://labor.idaho.gov/ftp/requiredposters.pdf> (for English posters) and <http://labor.idaho.gov/ftp/requiredpostersspan.pdf> (for Spanish posters only post if you have Spanish speaking employees.) Copies of most of the posters are also included in the Appendix, and can be copied. Most of the posters are also available in Spanish.

**Where should you post the notices?** Any place where your employees are likely to congregate is a good place---by the coffee machine, in a lunch room, etc.

### **11. Discrimination**

There is sometimes confusion on the part of religious employers about whether discrimination laws apply in the church employment setting. The basic rule is that when a state or federal law prohibits discrimination on the basis of a particular "protected class" those laws also apply to religious organizations unless they are exempted. There is no general exemption for religious organizations.

However, many people use the word "discrimination" to apply to circumstances that are not protected by federal law. The basic rule is that not all employees must be treated the

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same. A parish/school can determine that one employee will be paid more than another, or will have certain privileges, and others will not.

What the law says is that the decision to treat employees differently cannot be based on certain “illegal” reasons. The illegal reasons are:

- ✓ National origin
- ✓ Race/ethnicity/color
- ✓ Disability
- ✓ Age
- ✓ Gender

Most employers are also prohibited from discriminating on the basis of religious beliefs. However, religious employers CAN discriminate on the basis of religion, so long as they do it for the correct reasons. Generally, this means that parishes can restrict hiring to Catholic employees, if religious beliefs are important to the parish/school or the position. Parish leaders/principals should consider whether the particular position requires a Catholic. Ministerial positions clearly require that the applicant be Catholic, but maintenance positions may not. In addition, parishes/schools cannot discriminate based on one of the listed protected class by calling it “religious” discrimination.

What this means is that parishes must be careful to make all employment related decisions without illegal discrimination. Such discrimination can occur at any time during the employment relationship, including in hiring, performance evaluation, wages, discipline and termination. If an employee is in a protected class as noted above, and you are uncertain whether a particular decision you are about to make is lawful, contact the Director of Human Resources, Bob Fontaine at (208) 342-1311x 5155 or [bfontaine@rcdb.org](mailto:bfontaine@rcdb.org).

### **A. Race/color/ethnicity discrimination**

It is unlawful under federal and state law to discriminate on the basis of race. While the federal law identifies this type of discrimination as “race” discrimination, it is probably more correctly referred to as discrimination on the basis of “color” or “ethnicity.” Thus, it is unlawful to make employment decision based upon the fact that the individual is African American, Hispanic, Asian, etc. It is also unlawful discrimination to treat someone differently because they are Caucasian or Indian. Thus, the federal law protects all “races” regardless of which “race” is affected. This means that it is unlawful to refuse to hire an individual because they are Caucasian, just as it would be unlawful to refuse to hire someone because they are African American. Thus, employment decisions such as hiring, performance and termination should not be based on this criteria.

### **B. National origin discrimination**

It is unlawful under federal and state law to discriminate on the basis of national origin. Thus, it would be unlawful to refuse to hire someone because they are from Mexico, or Japan, or Iraq. It would also be unlawful to refuse to hire someone because they were NOT

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from Mexico or Japan. It would also be unlawful to treat someone differently because of their national origin. Thus, stereotypes about employees from a particular country are unlawful when they are used to make decisions in the employment setting.

### **C. Age Discrimination**

It is unlawful under federal and state law to discriminate against someone who is over 40 years of age. Thus, a parish/school cannot terminate an individual because they are “too old.” Nor can they decide to hire only a “young” person for a particular position.

### **D. Disability Discrimination-Americans with Disabilities Act**

One of the most difficult areas of discrimination law is the federal and state law governing disability discrimination. The employment discrimination provisions of the Americans with Disabilities Act (ADA) apply to parishes. What this means is that pastoral leaders must be familiar with the ADA, and its requirements, in order to ensure that parishes/schools are complying with the law.

The ADA prohibits employers from discriminating against those with disabilities, and also requires that the employer provide reasonable accommodations to those employees who need them to be able to adequately perform their assigned duties.

***What is a Disability?*** An individual has a disability under ADA when he/she has a physical or mental impairment that substantially limits a major life activity. A little known detail is that people who have physical conditions such as epilepsy, diabetes, HIV infection or severe forms of arthritis, hypertension, or carpal tunnel syndrome may be individuals with disabilities. People with mental impairments such as major depression, bipolar (manic-depressive) disorder, and mental retardation may also be covered. Thus, pastoral leaders must be sensitive to requests for modifications in workload or duties from employees who have any medical condition. If there are questions about whether a particular condition constitutes a disability, and thus requires an accommodation, consult the Diocesan Director of Human Resources.

***What kind of reasonable accommodations are required?*** One of the most difficult tasks an employer might face under the ADA is determining when an accommodation is legally required, and what must be done. A reasonable accommodation is a modification to a job which will allow an individual with a disability to perform the job's essential functions. Reasonable accommodations can include: (1) making facilities used by employees readily accessible and usable by persons with disabilities; (2) job restructuring; (3) modifying work schedules; (4) reassignment to a vacant position; (5) acquiring or modifying equipment or devices; (6) adjusting or modifying examinations, training materials or policies; or (7) providing leave to allow for a recovery from acute episodes; or (8) providing qualified sign language interpreters.

***Can I ask for medical documentation about the disability?*** A difficult thing about the ADA is that it prohibits employers from inquiring about medical conditions, except under

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specific circumstances. The questions that an employer can legally ask are tricky and often initiate illegal questions. However, *if an* accommodation is needed, the employer may ask for documentation from a health care provider describing the individual's disability and why the requested accommodation is needed.

What you may do when requesting medical information:

- ✓ Specify what types of information you are seeking about the disability and needed accommodation.
- ✓ Explain that you will need to know (e.g., the type of impairment the individual has) how the impairment limits a major life activity (like sitting, standing, performing manual tasks, or sleeping).
- ✓ Request information about how an accommodation would enable the employee to perform job-related tasks.
- ✓ Provide the employee's health care professional with a description of the job's essential functions to increase the likelihood that you will get accurate and complete information the first time you ask for it.

The safest way to ask for medical information about a disability is to use a form and attach a copy of the job description to this form, and ask that the medical provider fill it out and return it. This way you can be sure that you are asking only the allowed questions, and not including illegal questions. A copy of this form is included on the next page.

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**REQUEST FOR MEDICAL INFORMATION SUPPORTING  
WORKPLACE ACCOMMODATION**

Dear Medical Provider:

\_\_\_\_\_ has requested that this organization provide an  
Employee Name

accommodation to his/her job duties. *A copy of the employee's job description is attached.* The employee has requested that she/he be allowed to (describe request)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ because of (physical or mental condition)\_\_\_\_\_

To assist us in addressing this request, please provide the following information. The employee has signed a release noted below allowing the disclosure of this information.

(1) Description of medical condition which constitutes a substantial limitation on major life activities of the employee: \_\_\_\_\_

(2) Description of the types of physical and mental limitations created by this condition:

\_\_\_\_\_  
\_\_\_\_\_

(3) Would the accommodation noted above allow the employee to perform the essential functions of the job? Yes\_\_\_\_ No\_\_\_\_ Reason:\_\_\_\_\_

(4) What other types of accommodations could be provided to allow the employee to perform the essential functions of the job? \_\_\_\_\_

\_\_\_\_\_

**Release:** I, \_\_\_\_\_, hereby give my full consent and permission to my medical provider, and those working on behalf of my medical provider, to release all requested medical information to my employer, and I waive any privacy rights I may have under federal or state law, including specifically my rights under HIPAA. I agree to hold my medical provider and its agents, volunteers and employees, harmless from any liability with respect to the release of this information

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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***How do you make a decision on what type of reasonable accommodation is necessary?*** The law requires that the employer and employee engage in an “interactive” process to determine what type of accommodation is required in each circumstance. To do this, pastoral leaders/principals should:

- ✓ Keep lines of communication open.
- ✓ Explain your decision.

***What type of accommodations might be needed?*** Some types of accommodation that may be required include: (1) purchasing special equipment, (2) providing accessible materials, (3) making the work space accessible, (4) restructuring so that the employee can do the job (without changing the essential nature of the job), (5) modifying work schedules (as long as the employee can still perform the job, i.e. you are not required to create a part time position if the employee was full time), (6) providing leave to allow the employee to recover from a medical condition, (7) modifying policies or supervisory methods, or (8) reassignment to another position (but you are not required to displace an existing employee or create a new position). If you have specific questions about whether an accommodation that an employee has requested is appropriate, or required, call the Diocesan Director of Human Resources for assistance. An employer is not required to provide every accommodation that the employee requests. However, an employer is required to provide accommodations which will allow the employee to perform the essential functions of the job.

***Don't make decisions based on your own assumptions, generalizations or stereotypes.*** Pastoral leaders/principals must be careful not to exclude or discriminate against a qualified person with a disability based on myths, unsubstantiated fears, or stereotypes about that person's ability to safely perform the job. Any determinations made cannot be based on **generalizations** about the condition. The determination cannot be based on unfounded fears about the condition. Thus, a pastoral leader should not exclude an individual with a heart condition from a stressful position based on an assumption that the position will pose a health risk to the individual. A pastoral leader should not exclude an individual with a back condition from a job requiring lifting based on the assumption that there is a risk of injury. Instead, the determination must be based on the actual abilities of the individual, the medical information provided, and the nature of the position itself.

***Call for help when confronted with a reasonable accommodation issue.***

Application of ADA concepts is very complicated, and very dependent upon the circumstances of each individual case. Pastoral leaders would be wise to consult with the Human Resources Department before taking any action with respect to a person with a disability.

### **E. Gender Discrimination**

It is unlawful under federal and state law to make employment decisions based upon gender. Thus, parishes/schools would be violating the law if they decided to hire “a woman” for a particular position, and they would also violate the law if they decided that only a man

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would be hired for a particular position. Employment decisions should be made based upon the qualifications of the individual, and not based upon their gender.

### **F. Harassment on the Basis of a Protected Class**

One form of unlawful discrimination is “harassment” where the harassment occurs because of one of the categories noted above (race/color/ethnicity/national origin/ age/ disability/gender). Harassment of this type is also a violation of diocesan policy. The Diocesan policy prohibiting sexual harassment is included as an attachment to the Sexual Misconduct Policies. The Diocesan policy prohibiting harassment based on the other categories is included in the Diocesan Personnel Policies. Both are also included in the Appendix to this Manual.

## **12. Family Medical Leave Act**

When an employee takes a leave of absence for an illness, do you know whether there are any obligations under the Family Medical Leave Act with respect to that employee, and their leave rights? Diocesan Personnel Policies outline the legally required policies for FMLA leave, but here is a checklist for determining whether the FMLA applies, and what is required of the parish/school when leave is required.

### **A. Is the employee eligible for leave?**

In order for the employee to be eligible for FMLA, all of the following questions must be answered yes:

- (A) Does the employee work in a location within a 75 mile radius of at least 50 Diocesan employees (this includes all parish and school employees)?
- (B) Has the employee worked for the Diocese for at least one year (this includes part or full time work, any seasonal work, and several different employment periods can be added together to make up one year of service (i.e., it need not be consecutive)—in addition, service in a parish and in a school can be added together)?
- (C) Did the employee work at least 1250 hours in the previous year (measured back from the time that FMLA leave is requested)?

If you answered “yes” to each of the previous questions, then the employee is eligible for FMLA leave, if the leave is taken for a “qualifying” reason.

### **B. Does the leave qualify for FMLA?**

Only certain types of leaves “qualify” for FMLA. The advantage to the employee in obtaining a FMLA qualifying leave is that the employee’s job is protected, and the employee’s benefits are protected, for the length of the leave. If the employee “qualifies” for leave, the leave cannot be denied.

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A leave “qualifies” if it is taken for one of the following reasons:

- (A) A serious health condition of the employee which prevents them from working for three days or more, or which is a chronic condition that requires ongoing medical treatment.
- (B) A serious health condition of a spouse, parent or child of the employee, where the employee is needed to care for the ill person. Note that this does not include in-laws, grandchildren or grandparents.
- (C) Birth of a child (note that this leave is available to either parent of the child).
- (D) Placement of a child for adoption or foster care.

If there are any questions about whether the leave qualifies, consult the Personnel Policies or the Human Resources Department

### **C. If the employee is eligible, and the leave qualifies, what do we have to do?**

When the employee requests leave for a qualifying reason, the employer must send a written notice to the employee outlining the employee’s rights under the FMLA. Forms that can be used for this purpose are included in Appendix C- FMLA Forms Section and a Sample letter is included on page 58. In the notice, the employee has to be informed of their rights to the leave, the length of the leave, the right to reinstatement to their position, the right to continuation of benefits, etc. A copy of the completed form should be provided to the Human Resource Department and Payroll Department.

### **D. Frequently asked questions**

***What does the right of reinstatement mean?*** If an employee is on FMLA leave, they are entitled to return to their previous position, or an equivalent position with equivalent pay, benefits and seniority. This means that while the employee is out on leave, the parish/school must plan for accomplishing the work in a way that does not permanently fill the position, and thus leaves it open for the eventual return of the employee.

***How long does this leave last?*** Each employee’s FMLA leave entitlement is 12 weeks per year.

***Does the employee get paid while they are out on leave?*** The FMLA and diocesan policy allows the employee to substitute paid leave banks so that pay can be continued during the length of the leave. The parish/school is not required to pay the employee for leave that lasts beyond the length of available paid leave. Contact the Human Resource Department if you have specific questions about substituting paid leave.

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***What happens to the employee's benefits while the employee is on leave?*** All of the employee's benefits must be maintained at the same level while they are out on leave. If they pay part of the premiums, they must continue to do so, and if they are not being paid wages during that time, they must make arrangements for timely payment of their portion of the premium.

***What if the employee cannot come back to work at the end of the leave?*** If the employee is unable to come back to work, their right to reinstatement is lost, but you may continue their leave for good reason. Contact the Human Resource Department for specific questions in this area.

### **E. Leave Request Form**

If desired, the parish/school can request that employees who want FMLA leave indicate their desire to take leave in written form. This is not required by law. In addition, the employee need not even indicate that they desire FMLA leave. Their request for leave can come in the form of an indication that they or a family member has a serious health condition, and they need time off because of it. Once the parish/school receives that information, the obligations under the FMLA are triggered even if the employee never uses the term "FMLA."

### **F. Sample form letter for responding to FMLA leave request**

When an employee requests FMLA leave, it is legally required that the parish/school responds in writing to the request. A letter that could be used for this purpose is on the next page. (A copy of form WH-381 may also be used for the employer response, this form is found in Appendix C - FMLA Forms in the back of this manual.)

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### **Sample Letter Responding to FMLA Leave Request**

On [DATE], I learned that you would be taking time off for [FMLA QUALIFYING REASON] beginning on [DATE]. Please know that our thoughts and prayers will be with you as you seek attention for your [FMLA QUALIFYING] issues. Please do not hesitate to ask for help if there is anything that we can do to assist you during your leave.

You have indicated that your leave will begin on [DATE] and continue for approximately [LENGTH OF LEAVE EXPECTED] weeks. As a Diocese we are committed to complying with all applicable laws, including the federal Family and Medical Leave Act. Under that act, you are eligible for such leave, given your tenure with the Diocese and your [FMLA QUALIFYING REASON]. Under that act, your medical leave will continue for as long as medically necessary, to a maximum of twelve weeks from [DATE LEAVE BEGAN] as long as your condition prevents you from working.

Federal law also requires that we continue your health benefits for the leave period. Any health insurance premiums that you are responsible for will continue to be deducted from your pay. During this leave period, your position will remain unfilled, and you are guaranteed reinstatement to your current position at the end of the leave period. I would also like to request that, when you are able, you have your physician complete and return the enclosed medical certification form for our records. Once you determine that you are able to return to work, I may request that you have your physician complete another form certifying your ability to return.

Family Medical Leave is unpaid leave, but [EMPLOYING PARISH OR SCHOOL] allows you to continue to receive pay during your leave by the use of your accrued sick and vacation leave. Under these circumstances, we will continue your pay by use of your sick leave accruals. In the event that accrual is exhausted, we will then continue your pay by use of your accrued vacation. In the event that it appear that both your sick and vacation leave will be exhausted, we will consider continuation of your pay under some other acceptable arrangement, which will be discussed with you in the event that circumstance arises.

Please keep [YOUR SUPERVISOR] apprised of your status and eventual return to work. We wish you a speedy recovery! If you have any questions about the content of this letter, or any other questions about how we will handle your leave issues, please check with myself, [YOUR SUPERVISOR OR THE DIOCESAN HUMAN RESOURCES DEPARTMENT].

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In addition, the federal government has prepared a form that an employer can use to respond to requests for FMLA leave, and that form can be used if desired. The advantage of using the government form is that it simply requires the employer to check off certain information, and the parish/school can thus be assured that they have complied with the government regulations. A sample of the government-issued form is included in the Appendix.

### **G. Certification Form for Health Care Provider**

When the employee requests FMLA leave, the parish/school has the right to request medical information from the employee's health care provider. However, only certain types of information can be obtained, and questions that go beyond the scope of the allowed questions may be illegal. The federal government has prepared a form to be used for seeking such information from a medical provider, and the Diocese recommends that parishes use this prepared form to seek medical information from the employee's medical professional. Copies of the following forms are included in Appendix C – FMLA Forms in the back of this manual: WH-380-E Employee's Serious Health Condition, WH-380-F Family Member's Serious Health Condition and WH-381 Notice of Eligibility and Rights & Responsibilities.

## **13. Performance Management**

### **A. The Concept of Performance Management**

Performance management is a key component in assuring that the essential mission of the parish/school is accomplished, while at the same time contributing to the morale of individual employees. Thus, careful thought and planning should be invested in a performance management system. Performance management does not consist merely of a performance appraisal or evaluation once a year. Instead, performance management is a continual process which occurs throughout the year. It is also a way to assure that the essential mission of the parish/school is accomplished through human work. It begins with establishing job descriptions for each position within the parish/school. The job description provides the backbone, establishing the expectations for what that position will accomplish. The creation of job descriptions is discussed earlier in this Manual, and sample job descriptions are included in the Appendix.

A second step is the establishment of specific expectations for each employee. The establishment of expectations is essential, so that the performance can be measured against expectations. Methods for establishing goals and expectations for employees are discussed later in this section.

Finally, there must be some method of providing specific feedback to the employee, so that they can understand how their performance is perceived, and what they can do to further the mission of the parish/school. Generally, this process of feedback is formalized as a yearly performance appraisal, but should include a practice of regular feedback throughout the year.

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In establishing a system of performance management, consider the organizational objectives for such a system:

- **Provide feedback:** Performance management is a way of providing feedback to the employee about how their performance is perceived, but also a way of facilitating communication with the supervisor about the employee's perception of the organization.
- **Encourage performance improvement:** a good performance management system will encourage employees to improve their performance.
- **Motivate superior performance:** Providing feedback through performance management is a way to motivate superior performance from all employees.
- **Set and measure goals:** This system is a way to set goals for individuals and for the parish/school, and seek ways to accomplish those goals.
- **Counsel poor performers:** A good performance management system is also a way to help poor performers understand their behavior and what needs improvement.
- **Coach and mentor:** This system is a way to help employees improve by coaching and mentoring, to the long term benefit of the parish.
- **Determine development needs:** The performance management system is also a way to determine what additional formation or development the individual employees need to assist them in performing at their optimum level.
- **Improve organizational performance:** The performance management system has as its core purpose the improvement of overall organizational performance.

In developing a performance management system, it is helpful to understand a few things about human performance, and how employees are generally motivated to perform. The following facts were established during research studies of human performance.

- Criticism has a negative effect on achievement of goals. Thus, a performance management system should not rely exclusively on criticism as its foundation for feedback.
- General praise has little effect on employees one way or another. That is because praise not tied to specific accomplishments has no effect on performance.
- Performance improves most when specific goals are established.
- Coaching has more effect when it occurs day to day not yearly.
- Mutual goal setting, not criticism, improves performance.
- Participation by the employee in the process yields the best results.

Thus, parishes/schools should establish a performance management system that considers the above factors in motivating employees to better performance.

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### **B. Setting Goals and Expectations**

As noted above, an important part of the performance management system is the establishment of goals and expectations for each employee. In developing guidelines for performance goals and expectations for a particular position, the following organizational purposes should be kept in mind.

- (1) The performance appraisal process is designed to provide feedback to employees about their performance, thus the clearer the goals and expectations are, the more valid the feedback will be.
- (2) The performance appraisal process could be used to make decisions on the incumbent's future, such as promotions, etc., and thus the fairness and realistic nature of the goals and expectations should be considered in helping to promote a fair performance appraisal.
- (3) The performance appraisal process can be used to encourage better employee performance. Thus, goals and expectations should be reasonable in scope and attainable, so that they do not discourage employees.
- (4) The performance goals and expectations should relate to the overall goals of the organization, and should further the parish's plans for accomplishing specific objectives.
- (5) Performance goals and expectations can also consider specific elements of additional training and formation needed by the individual minister.
- (6) Performance goals should be based primarily on the duties and responsibilities of the individual employee.

In writing performance goals, use the following steps:

- (1) Start with an action verb.
- (2) Identify key results for each objective.
- (3) State the verifiable criteria that will demonstrate the goal has been achieved.
- (4) Ensure that the goal is controllable by the employee.
- (5) Determine the goal priorities.
- (6) Determine how progress will be measured and how feedback will be provided.

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Use the following “SMART goal” keys to developing goals. Make the goals:

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**esult-focused
- **T**ime-oriented

After writing each goal statement, test it against the SMART goal criteria to assure that it meets the tests. Examples of goals for a pastoral associate in charge of administration might be:

- (1) Review and revise job descriptions for each staff member within the next six months, using a collaborative process with each staff member.
- (2) Review and revise the parish/school personnel handbook within the next six months, considering Diocesan personnel policies, researching appropriate additional policies, and gathering input from each staff member on ideas and suggestions.

Examples of goals for a pastoral associate for finance might be:

- (1) Within the next six months, research and propose changes in financial accounting system that will improve efficiency and accuracy.
- (2) Within the next six months, reduce the processing time for invoice payments from three days to one day.
- (3) Develop a process for better communication with members of the Parish/School Finance Council by the end of the year.

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**C. Sample Worksheet for Creating Goals and Expectations**

**GOALS AND EXPECTATIONS**

**Position:** \_\_\_\_\_

<b>GOAL</b>	<b>TIME FOR COMPLETION</b>	<b>RESULT/CRITERIA</b>	<b>COST</b>

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### **D. Appraisal of Performance**

Performance evaluation or appraisal is a key component of assuring that the essential mission of the parish or school is accomplished, while at the same time contributing to the morale of individual employees. Thus, careful thought and planning should be invested in a performance evaluation system.

The essential elements to consider are:

- (1) A performance evaluation should be based on the list of responsibilities and the performance expectations set out in both the job description and the performance goals documents noted above.
- (2) The performance evaluation process should include both the employee and the supervisor(s) in assessing performance.
- (3) The performance evaluation process is a way of allowing the parish/school to amend goals and objectives to assure consistency with the position's essential purpose.
- (4) The performance evaluation process should identify not only strengths and excellent performance, but should also identify weaknesses in performance and give suggestions for improvement. The performance evaluation process is also a time to assess further formation that might be necessary. It is also a time when any misconceptions about expectations can be cleared up.

### *Pitfalls to avoid when conducting an annual performance appraisal*

- Don't focus on one specific incident - review the entire year.
- Don't go solely by memory - base the review on accurate and factual data (thus you should have kept notes during the year to refer to when completing the review).
- Avoid the rating errors noted below.
- Length of service does not necessarily mean better performance.
- Avoid using bias based on your personal feelings.
- Don't base current performance on a prior years' performance.
- Don't overrate a poor performer to try to motivate them.
- Not all individuals are the same. Analyze each employee individually and carefully.
- Record accurate information.
- Don't be afraid to provide truthful information, even if it is critical.

**Rating Errors:** There are a number of “errors” that managers commit in rating employees that should be avoided. These include:

- **Attractiveness Effect:** Rating an employee based upon their appearance.
- **Attribution Bias:** Rating an employee based upon factors outside their control.

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- **Central Tendency:** Tending to rate everyone the same towards the middle of the curve.
- **First Impression Error:** Rating someone based on your first impression, without considering subsequent events.
- **Halo Effect:** Rating someone's overall performance based solely on one aspect of their job which they perform very well.
- **Horns Effect:** Rating someone's overall performance based solely on one aspect of their job which they do not perform well.
- **High Potential Error:** Rating someone based upon their potential rather than upon their actual performance.
- **Negative and Positive Skew:** Rating everyone negatively or positively.
- **Past Performance Error:** Rating someone based on past and not current performance.
- **Recency Effect:** Rating someone based only on the most recent performance.
- **Similar to Me Effect:** Rating someone highly because they have the same qualities as the rater.
- **Stereotyping:** Rating someone based upon assumptions or biases that are based on stereotypes.

There are many different types of appraisals and forms that could be used. Some of the different types are:

- Supervisor Appraisal (the supervisor appraises the subordinate)
- Employee Self Appraisal ( the employee rates themselves, this could be used in conjunction with other types of appraisals)
- Customer Satisfaction Survey (those who use the services of the employee are asked about their assessment of performance)
- Upward Appraisal (subordinates rate the performance of their supervisors)
- 360 Degree Appraisal (everyone rates everyone else)

Some sample forms are included in the Appendix.

Once the form is chosen, and completed, the supervisor must then meet with the employee to discuss the performance appraisal. Here are some tips for preparing for that meeting:

### ***Before the Meeting:***

- (1) Provide copy of appraisal in advance
- (2) Ask employee to do a self assessment
- (3) Be prepared -- know the objectives and goals of the meeting;
- (4) Choose an appropriate time and place, a quiet, private spot with no interruptions;

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### ***During the Meeting:***

In conducting the meeting:

- Welcome the employee
- Begin with a prayer
- Create a positive environment and help the employee feel at ease
- Describe the meeting's importance
- Provide the time frame and flow
- Tell the employee where you will start
- Describe the goals
- Give an overall view of performance
- Talk about specifics
- Give balance feedback, both positive and negative, but start with the positive
- Discuss strengths first
- Use honesty, openness and trust
- Listen, do not dominate the discussion
- Keep the discussion job related
- Emphasize ways to improve
- Provide specific examples for ratings
- Reinforce desired behaviors
- Focus on future performance
- Remain professional at all times
- Focus on the job, not the person
- Ask questions and allow the employee to provide feedback
- When discussing expected improvement, discuss how the employee can improve
- Provide specific steps for improvement
- Summarize and review the important points of the discussion
- Restate the action to be taken and provide a time frame for completion
- Have employee sign the form to acknowledge that he or she has read it (make it clear this signature does not signify agreement with the content)

### ***Closing the Discussion:***

- Briefly summarize the discussion
- Discuss two or three areas of strength to be emphasized
- Discuss areas for improvement
- Discuss developmental needs
- Schedule additional planning meetings
- Offer statements of hope, vision and gratitude

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### *Follow-up on the review in a few weeks:*

- Follow-up with the employee to assess progress within the given time frames
- Offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles

Avoid some common mistakes in assessing performance. These include:

- Confusing activity with achievement
- Rating personality, not performance

Often, in motivating employees, especially given the human performance research noted above, it is better to use the Sandwich approach, which is to talk about strengths, then weaknesses, then compliments, and thus “sandwiching” the weaknesses which might be interpreted as criticism in between positive and encouraging comments.

Two other thoughts might help in focusing on what should be communicated in the conversation with the employee:

- (1) What is the single most important message I want to communicate to this employee during this process?
- (2) How is this message related to our core mission?

Following is a checklist of the most important things to remember about conducting performance appraisals:

- ✓ Create a positive environment and make employee feel at ease-welcoming, inviting.
- ✓ Prayer
- ✓ Begin by giving roadmap of how you will conduct the meeting
- ✓ Provide an overall view of the year’s performance, citing strengths of the employee
- ✓ Allow employee to comment on your views of strengths
- ✓ Discuss areas of improvement, and cite methods for improving
- ✓ Relate improvements needed to overall mission/vision
- ✓ Discuss specific ratings and provide examples to illustrate
- ✓ Discuss employee’s goals for coming year
- ✓ Discuss how employee’s goals relate to mission/vision for organization and workgroup
- ✓ Discuss any needed changes in job description
- ✓ Discuss any development opportunities or needs
- ✓ Discuss any action steps agreed upon
- ✓ Summarize the discussion at the end
- ✓ Have employee sign the rating form, and provide written comments if appropriate
- ✓ Close the discussion on a positive note
- ✓ Set a time to meet within a few weeks to have a follow up discussion regarding goals and objectives for coming year

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### **E. Addressing performance problems**

On occasion, an employee's performance may be impacted by attitude, absenteeism, a single incident of inappropriate behavior, poor interpersonal relationships on the job, or similar issues. Corrective actions may range from simply counseling the employee to a formal disciplinary process.

In addressing the issues, consider the following questions:

- What are the facts surrounding the episode?
- How serious is the infraction?
- Was the employee informed of the work rules in advance?
- Has there been adequate warning about the inappropriate behavior?
- Have there been similar discipline problems in the past with this employee?
- Has the employee been made aware of the consequences of this behavior?
- Does the employee's behavior hamper the day-to-day operation of the parish/school?
- What has the history of the employee been with the parish/school?
- Have you allowed the employee to tell his or her account of the problem?
- Have you thoroughly investigated the problem?
- Have you obtained enough facts to show that the employee displayed inappropriate behavior or violated policies or rules?
- Has the investigation been fair and objective?
- Have you enforced rules and standards consistently?
- Have you remained uninvolved emotionally during this process?
- Does the discipline under consideration fit the infraction?

Document all of the information gathered in the course of responding to the above questions.

### **F. Counseling the Employee - Do's and Don'ts**

- Do not reprimand employees in the presence of others or in a public place.
- Determine the appropriate time and place for a meeting to discuss the behavior or performance issue.
- Investigate an incident or infraction thoroughly regardless of how the situation appears at first glance.
- Allow the employee a chance to respond and explain the incident or behavior.
- Such meetings should always be documented in detail. The documentation should include: (1) who, what, when, where, and how; (2) the effect of the conduct on performance or morale; (3) what action will be taken because of the incident; (4) what action will be taken in the future if another incident occurs.
- Evaluate the objectiveness of the action you are taking.
- Present the problem to the employee in a slow, calm manner. Describe precisely what your concerns are, and what changes in behavior you expect to see from the employee.
- Listen critically and take notes.

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- Conclude the discussion and determine what will happen from that point. Explain clearly your expectations for improvement, including precisely what changes you will be looking for in behavior or performance.
- Monitor the employee's performance and progress after the meeting.

Document the discussion that you have with employees about performance problems. Include:

- Date
- Names of those present
- Specific issues discussed
- Identify any agreements about future performance that arose
- Identify any agreements about actions that will be taken (additional training, etc.)

Place these documents in a file assigned to the employee, for future reference in case problems arise in the future, and for assistance in conducting a yearly performance appraisal.

### **14. Compensation Issues**

There are several issues to considering when addressing compensation. First, parishes/schools must consider whether their compensation is fair and just under all of the circumstances. Second, parishes/schools must follow federal and state law with respect to their compensation practices.

#### **A. Just Compensation**

As noted in the introductory material, principles of Christian Human Resource Management mandate that parish compensation be fair and just under the circumstances. One of the principles which specifically governs wages is that church workers should receive a sufficient wage and social benefits similar to those received from responsible United States employers. To employees, compensation often represents both their position's relative value to the organization, as well as their ability to meet financial obligations. Taking great care to assure fairness and consistency will send a message to employees (if communicated correctly) that the organization values their contribution in a tangible way. While a recent job satisfaction survey of employees did not rate compensation as the highest factor for employees in assuring job satisfaction, it was rated in the top five, and over half of the employees surveyed rated it as most important. *SHRM/CNNfn Job Compensation/Pay Survey Report, January, 2004*. Thus, it is important for an organization's overall employee morale to have a fairly well-defined and fair compensation system. If the system leaves room for employees to perceive that pay decisions are arbitrary, or that there are inequities built into the system, then morale may suffer, retention of valuable employees may be more difficult, and the Church's overall mission will suffer.

Another social justice position supported by the Diocese of Boise is a mandated "living wage" for all workers. Thus, church workers should also be paid a "living wage" in accordance with these social justice teachings. A living wage can be defined as compensation

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(pay and benefits) which provides for the basic human needs of workers. The lowest paid person in the church organization should be receiving a living wage.

There are other social justice factors to consider in developing a parish compensation structure. National Association of Church Personnel Administrators (NACPA) urges parishes/schools to use the following factors as a guideline:

1. Each parish should have developed an operative plan, including a mission statement, so that its compensation and organizational structure matches the specific need fulfilled by individual positions within the institution.
2. The church's teaching on justice should be reflected in the institution's personnel philosophy, compensation program, policies and procedures.
3. The institution's philosophy of compensation should be clearly articulated.
4. The compensation package as a whole (i.e., the blend of salary and benefits) should be sufficient to support employees and their dependents at a moderate standard of living level.
5. The compensation program should promote dignity by providing choices for in-kind benefits and discretionary income.
6. The compensation program should be based on a model that fosters participation, communication and mutuality.
7. Compensation should be based on a reasonable work week.
8. Permanent deacons, when they function as full-time paid church workers, should be compensated as lay persons. Lay parity should be considered for vowed religious as well.
9. The compensation program should be published, communicated, understandable, predictable and stable.
10. A performance appraisal process for all church workers should be part of the compensation system.
11. All of the above assumptions should apply in some way to each category of church worker, respecting the appropriate distinctions.

NACPA also encourages a philosophy regarding the ability to pay which should be considered in making appropriate salary structure decisions.

It is necessary to balance compensation costs with the ability of the church institution to generate revenue. Given financial limitations, a decision needs to be made about what the

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local church institution can afford to pay for the position. This decision should be based on *the most the institution can afford* rather than on *the least the institution can provide*. Whatever the choices, the wage structure should be sufficient to attract, motivate and retain competent workers.

This NACPA philosophy is best stated as: The approach should not be “what can parishes get away with doing for the least cost” but rather “what are the benefits that will allow parishes to attract and retain excellent employees?”

Another issue that must be considered is the salary level for individual positions. Determining the appropriate salary for particular positions will depend upon the job duties assigned and the parish/school location. Generally, it is better to determine salaries based upon a number of different factors. Upon request, the Human Resources Department can conduct an analysis of the particular parish positions at issue, and provide some general guidance on appropriate salary levels.

### **B. Overtime Compensation: The Exempt/Nonexempt Dilemma**

Federal law requires employers to pay overtime compensation at time and one half for every hour an employee works over 40 hours in one week. However, if an employee is *exempt*, then no overtime is due, regardless of the number of hours worked. Here are some important points to keep in mind in determining whether your employees are exempt:

- **In order to be exempt an employee must be paid on a salary, not on an hourly basis.** Thus, if your employees are paid by the hour, it does not matter what type of work they do, they cannot be considered exempt from the overtime laws. Thus, if they work over 40 hours in a week, they must be paid time and one half in overtime compensation.
- **An employee who is paid a salary is not necessarily exempt!** Another mistake is to assume that if you pay an employee a monthly salary, they are exempt regardless of their job duties, and no overtime is due. Payment of a salary alone is not sufficient to make an employee exempt. They must also be performing *duties* that are exempt. Thus, if your clerical employee is paid a monthly salary, but works over 40 hours in a week, they must be paid time and one half for every hour worked over 40.
- **An employee is exempt only if they fall into one of these categories of work:** (1) executive; (2) administrative; (3) professional; (4) computer professional; (5) outside sales. In parishes/schools, an employee would qualify as an “executive” only in very large parishes, because one of the requirements is that the person be a direct supervisor for at least two other full-time employees (or their equivalent, such as one full-time employee and two half-time employees). Parish/school workers would also rarely meet the requirements of a “professional” exemption, because the workers who fall in that category are professionals like doctors, lawyers, teachers, etc., whose positions generally require post-secondary learning of a specific profession. Since exemptions (4) and (5) also rarely apply in a parish setting, most parish/school workers who are “exempt” will be considered exempt as administrative workers.

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- **How do our employees qualify for the administrative exemption?** To qualify for this exemption, an employee would be required to have responsibility for a specific portion of the parish work, and exercise independent discretion and judgment over that operation. (This is a vastly simplified version of the test, if you are unsure of how the exemption applies to any of your employees, you should check with the Director of Human Resources.) Thus, most full time pastoral associates, religious education directors, and youth ministers would qualify for this exemption.
- **What if our employees do not qualify for the exemption?** If your employees are not exempt, then you must either: (1) make sure they do not work over 40 hours in a week; OR (2) pay them overtime at time and one half for every hour worked over 40.
- **How do we determine how much overtime compensation must be paid to our employees?** There are specific rules under federal law for what constitutes “hours worked” and thus what “counts” toward the 40 hour threshold.
- **What if our employees work over 40 hours in one week on an event or project, can we simply give them time off in the following week?** Under the federal wage and hour laws, each work week stands alone, and thus it is illegal to use this method. You can, however, give time off *in the same week* to compensate for long hours in a day, so that the employee does not exceed the 40 hours maximum.
- **My employee works only four hours a day, and says that if she stays for an extra hour or two, she is entitled to overtime pay. Is this true?** The federal law only requires overtime pay for time worked over 40 hours in a week. Thus, for a part time employee, the 40 hour threshold would not be reached, and no overtime pay would be due. You would have to pay, however, for the extra hours at the regular rate.
- **My employee works through her lunch break most days. Do I have to count that towards the 40 hour maximum?** Federal law does not require employers to provide break time, but if you do, then you can exclude periods of longer than thirty minutes in calculating hours worked. However, if you provide a lunch break, but the employee works through the break, then the hours must be counted towards the 40 hours per week.
- ✓ **There are additional rules as well, if you have other specific questions about how to count hours for purposes of overtime pay, call the Director of Human Resources.**
- ✓ **The pastor/parish life director has the ability to control overtime liability by requiring that nonexempt employees not work beyond 40 hours in a week.**

### **1. Minimum salary levels for exemption**

New regulations under the Fair Labor Standards Act effective August 23, 2004, have a particular impact on ministerial positions that might normally be considered exempt. The new regulations indicate that, in order for an employee to be considered exempt, they **MUST** be paid a minimum of \$455 per week, or \$23,660 per year. If they are not paid that minimum salary, then they will automatically be considered non-exempt. What this means is that if you have a DRE, a CRE, a Youth Minister, or other ministerial employees, and they work over 40 hours in one week (such as for a particular event) they **MUST** be paid time and one half in overtime for every hour worked over 40. What this means is that parish leaders must more

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closely monitor the time their part time and lower paid ministerial employees spend in ministry in order to assure compliance with the law. If you have a part time youth minister, for example, who is scheduled to work on 30 hours a week, and is paid a salary, but that minister spends 44 hours working in a particular week, you may have to pay them for the extra time, plus overtime.

### **2. Checklists for exemptions**

Section 13(a)(1) of the FLSA exempts executive, administrative, professional, and outside sales employees from the minimum wage and overtime requirements of the FLSA, provided they meet certain tests regarding job duties and responsibilities and are compensated "on a salary basis" at not less than stated amounts. Subject to certain exceptions set forth in the regulations, in order to be considered "salaried", employees must receive their full salary for any workweek in which they perform any work without regard to the number of days or hours worked. This rule applies to each exemption that has a salary requirement (outside sales employees, and certain licensed or certified doctors, lawyers and teachers have no salary requirement. For certain computer-related occupations under the professional exemption, they need not be paid a salary if they are paid on an hourly basis at a rate not less than \$27.63 per hour). The special requirements which apply to each category of employees are summarized below. If you have questions about a particular employee and whether they meet the exemption, call the Director of Human Resources.

#### **A. Executive exemption**

This exemption is applicable to employees who:

- ✓ have management as their primary duty;
- ✓ direct the work of two or more full-time employees;
- ✓ have the authority to hire and fire or make recommendations regarding decisions affecting the employment status of others;
- ✓ regularly exercise a high degree of independent judgment in their work;
- ✓ receive a salary which meets the requirements of the exemption; and
- ✓ do not devote more than 20% of their time to non-management functions.

#### **B. Administrative exemption**

This exemption is applicable to employees who

- ✓ perform office or non-manual work which is directly related to the management policies or general business operations of their employer or their employer's customers, or
- ✓ perform such functions in the administration of an educational establishment;
- ✓ regularly exercise discretion and judgment in their work;
- ✓ either assist a proprietor or executive, perform specialized or technical work, or execute special assignments;
- ✓ receive a salary which meets the requirements of the exemption; and

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- ✓ do not devote more than 20% of their time to work other than that described above.

### **C. Professional exemption**

The is exemption is applicable to employees who

- ✓ perform work requiring advanced knowledge and education,
- ✓ work in an artistic field which is original and creative, or
- ✓ work as a teacher, or
- ✓ work as a computer system analyst, programmer, software engineer, or similarly skilled worker in the computer software field; and
- ✓ regularly exercise discretion and judgment;
- ✓ perform work which is intellectual and varied in character, the accomplishment of which cannot be standardized as to time;
- ✓ receive a salary which meets the requirements of the exemption (except doctors, lawyers, teachers and certain computer occupations); and
- ✓ do not devote more than 20% of their time to work other than that described above.

### **3. Payment of Overtime Compensation**

Overtime must be paid for every hour worked over 40 in a workweek. The FLSA applies on a workweek basis, which means that if an employee works 44 hours one week, and 36 hours the next, the two weeks cannot be averaged together, but instead the employee must be paid for 4 overtime hours at time and one half. An employee's workweek is a fixed seven consecutive 24-hour periods. It need not coincide with the calendar week, but may begin on any day and at any hour of the day. Different workweeks may be established for different employees or groups of employees. Normally, the workweek begins at midnight on Saturday and runs to midnight the following Saturday.

The overtime requirement may not be waived by agreement between the employer and employees. Employees cannot agree that they will not be compensated for certain hours.

Parishes can control overtime by applying a policy that no overtime work will be permitted unless authorized in advance, but if the employee does work overtime in violation of the policy, they must still be paid. (But the parish/school could impose discipline for violation of the policy).

The law does not require lunch or coffee breaks. However, when employers do allow short breaks (usually lasting about 5 to 20 minutes), federal law considers the breaks work-time that must be paid and thus that time must be counted towards the 40 hours. Meal periods (lasting at least 30 minutes), are not work time and need not be counted, unless the employee actually works through the meal break.

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Parishes may sometimes seek to avoid overtime by having an employee “donate” some time as volunteer time. However, the federal law requires that an employee be paid for every hour that the employer permits the employee to work. An employee may volunteer time working on projects outside the scope of their position, but may not volunteer hours to do their own job. In other words, a parish secretary could volunteer to teach a religious education class on the weekend, but could not volunteer to come in and catch up on office work within his or her job description.

When employees attend lectures, meetings, training programs and similar activities they need not be compensated, if these four criteria exist: (1) it is outside normal hours, (2) it is voluntary, (3) it is not job related, and (4) no other work is concurrently performed. Thus, if the training is job related, or the employee is required to attend, then the hours must be counted.

Travel time to conferences or meetings may also be counted, depending upon the circumstances. (1) Where an employee who regularly works in location is given a special one day assignment in another city and returns home the same day, the time spent in traveling to and returning from the other city is work time, except that the employer may deduct/not count that time the employee would normally spend commuting. (2) Time spent by an employee in travel as part of his/her principal activity, such as travel from job site to job site during the workday, is work time and must be counted as hours worked. (3) Travel that keeps an employee away from home overnight is clearly work time when it cuts across the employee's workday. The time is not only hours worked on regular working days during normal working hours but also during corresponding hours on nonworking days (i.e., Saturday and Sunday, count the hours from 8-5 if that is the employee's regular working hours) Time spent in travel away from home outside of regular working hours as a passenger on an airplane, train, boat, bus, or automobile is not counted, because the employee is free to use the time for their own purposes.

### **15. Independent Contractors**

Not everyone who performs work for a parish/school is an employee. Parishes/Schools can hire independent contractors, but the persons hired as independent contractors must meet certain criteria. If the parish/school hires an individual, and pays them a stipend, the parish/school is responsible for payroll taxes and withholdings unless the individual truly meets the definition of independent contractor. To determine whether the individual truly is an independent contractor, the Internal Revenue Service has set forth a detailed test for determining whether an individual is an independent contractor for purposes of paying employment tax and withholding. These factors and their application are as follows:

- an individual who is *required to follow instructions* is more likely to be considered an employee;
- the greater the *amount of training* needed for the individual to complete an assigned task, the greater the likelihood that the individual will be considered an employee;

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- where an individual is *integrated into the employer's business* to a great extent, the individual is more likely to be considered an employee;
- the fact that an individual *personally renders services* will weigh in favor of employee status;
- the fact that the *individual hires, fires and pays assistants*, and the employer has no right to do so, indicates independent contractor status;
- the existence of a *continuing relationship* is indicative of employee status;
- the establishment of a *set amount of work hours* suggests employee status;
- an individual whose time is substantially devoted to the job is more likely to be considered an employee;
- the fact that an individual *works on the employer's premises* suggests employee status;
- an individual who works according to a *sequence set by the employer* will more likely be deemed an employee;
- the fact that an individual *submits regular or written reports* to the employer will weigh in favor of employee status;
- an individual who is paid by the project, rather than by the hour, or other period of time, will more likely be considered an independent contractor;
- an individual who is *reimbursed for expenses* is more likely an employee;
- an individual who *furnishes the necessary tools and materials* for the job is more likely an independent contractor;
- that an individual *makes an investment in the facilities* in which he or she works weighs in favor of independent contractor status;
- the fact that an individual's work results in *the possible realization of a profit or the risk of a loss* suggests independent contractor status;
- an individual who *works for more than one organization* at a time is more likely to be an independent contractor;
- an individual who *makes his or her services available to the general public* is more likely to be considered an independent contractor;

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- the fact that the employer has the *right to discharge* the individual suggests an employment relationship (independent contractor relationships are more likely to be contractual); and
- the fact that the *individual has the right to terminate the relationship* also suggests an employment relationship because independent contractors are usually bound by a contract.

This test is applied by the Internal Revenue Service and by some state tax agencies to determine liability for contributions for social security and Medicare benefits, unemployment taxes, penalties, and interest. Courts have also used this to determine employee status under the National Labor Relations Act ("NLRA"), the Employee Retirement Income Security Act ("ERISA"), and the Americans with Disabilities Act ("ADA").

Parishes/schools should carefully review any relationships with those providing services to the parish/school, to assure that the legal status of the relationship is correctly identified.

### **A. Sample contract**

Keeping in mind that diocesan policy requires approval of contracts, a potential contract that could be used to formalize the relationship between a parish/school and an independent contractor is included on the next page.

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## **INDEPENDENT CONTRACTOR AGREEMENT**

This Agreement is entered into between \_\_\_\_\_ (parish or school) and \_\_\_\_\_ (independent contractor) on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

This Agreement governs the relationship between that parties with respect to work performed on behalf of the parish/school.

1. The parties agree that this relationship is an independent contractor relationship, and is not an employer-employee relationship.
2. The parties agree that the independent contractor has the right to control the time, place and manner in which the work will be performed. The parties also agree that the independent contractor will set his or her own hours, determine the order in which tasks will be performed, and determine the methods used to accomplish the tasks.
3. The parties agree that the independent contractor will be paid for the time necessary to complete each project, based on an hourly rate of \$\_\_\_\_ per hour. The independent contractor will submit a monthly invoice documenting the amount of time spent, and payment will be made on a monthly basis based on the invoice amount.
4. The parties agree that the independent contractor will be responsible for payment of any income tax liabilities arising from the income received from this contract. Because this is not an employment relationship, no withholding will be made, and the parish/school will not be responsible for payment of any employer portion of income tax liability.
5. As a condition of performing services for the parish/school, the independent contractor agrees to abide by all Diocesan standards of behavior while on church grounds, including but not limited to the Diocesan Sexual Misconduct policies. In addition, the independent contractor will, when requested, provide proof of the successful completion of a criminal background check if required as a condition of employment.
6. The independent contractor agrees that because this is not an employment relationship, the independent contractor has no right to receive any employment benefits from the Diocese of Boise.
7. The basic duties of the independent contractor are described on the attached Exhibit A attached hereto (if appropriate).

\_\_\_\_\_  
Independent Contractor

\_\_\_\_\_  
Parish/School Representative

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## **16. Employee Conflict Resolution**

One of the most difficult things that a parish leader or school principal may face is dealing appropriately with conflict that arises in the workplace. Following are some tips for handling issues relating to conflict with employees.

### **A. Preventing Employee Conflicts**

One of the most important points for a parish leader to remember is that it is not always possible to avoid conflicts with employees, or among employees. Indeed, some have said that conflict is a human condition, and must be viewed as a necessary part of the growth of ministry, and the maturation of a work group. Just as a diamond is formed by heat and pressure, conflict, and how it is handled, forms and shapes a work group. The important thing for parish leaders to remember is how to deal appropriately with conflict when it arises.

Nevertheless, there are some things that parish leaders can do in dealing with employees that will help avoid common conflicts that are unnecessary. Most of these steps involve communication with employees, and respectful treatment. Some suggestions include:

- ✓ Involve employees in decisions about their job duties
- ✓ Discuss with employees issues relating to their performance
- ✓ Seek input from employees regarding work rules or changes that will affect them
- ✓ Work on skills involving collaboration and leadership
- ✓ Work on communication skills
- ✓ Work on building a cohesive and mature work team
- ✓ Treat all employees with respect and dignity

Many of the suggestions in this Manual provide ways to accomplish the above suggestions.

### **B. Using a Conflict Resolution Process**

When conflict does develop (which is inevitable) there are appropriate ways to handle the conflict. First, avoiding the conflict is never the appropriate answer, because that simply allows the conflict to continue to develop, until it affects everyone in the workplace. Avoiding the conflict sends a message to employees that the leader does not care, and does not want to get involved. It leads to greater frustration and hostility.

Another style of dealing with conflict is accommodation. In using this style, the leader simply concedes whatever the individual involved in the conflict requests. An accommodating style seeks to preserve the relationship, but often has an opposite effect, by telling the work group that individual goals can be achieved by being demanding. The leader is thus seen as weak and ineffective, and more conflict may be created by using this style.

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Many people use a style of compromising to deal with conflict. Many times, however, this style creates “winners” and “losers” and may not be the best way to achieve the goals of the team or the organization.

A more effective style of dealing with conflict is a collaborative style, where relationships are valued, but communication is used as a way to seek solutions consistent with the overall goals of the team. This method of resolving conflict builds trust and increases the ability to the team to work together to reach goals.

The diocesan personnel policies contain a description of methods that should be used to resolve conflicts with employees. In addition, the Diocese has in the past created a mechanism to deal with conflicts among employees or between pastoral leaders and employees. This mechanism, referred to as a Conciliation Board, is being reviewed and information will be provided to pastoral leaders should it become a part of the conflict resolution process. Check with the Department of Human Resources for more information. The process of conciliation allows a party outside of the conflict to assist the team in creating workable solutions for resolving the issues.

### **17. Termination**

One of the hardest things a supervisor may ever have to do is to terminate an employee involuntarily. However, sometimes, such an action is necessary for the good of the organization. Care should be taken when addressing an issue of involuntary termination so, that respect for the human dignity of the person, as well as the legal implications of involuntary termination are always considered.

#### **A. Legal Issues Arising from Termination of Employment**

Avoiding potential legal liability is a necessity of good stewardship, so that the assets of the church are not unnecessarily placed in jeopardy because of the legal ramifications of a termination decision. In seeking to avoid legal liability for an involuntary termination, while treating the employee with fairness and dignity, below is a checklist that can be used to examine the decision being made:

- ✓ Has the employee been given notice of the reasons necessitating termination? Legally, notice is not required, but fairness may dictate that notice be given. If the reason for termination is specific misconduct, then advance notice may not be necessary, but if the reason for termination is because of a lack of performance, it is more fair and just to notify the employee of the deficiencies in performance and provide an opportunity to improve.
- ✓ Has the Director of Human Resources been notified that you are considering termination? The Diocese carries Employment Practices Liability Insurance, but one of the requirements of retaining coverage under that policy is a practice which allows for a review of employment terminations by a human resource professional or an attorney.

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***Keep in mind that the Diocese of Boise’s Personnel Policies for Parishes and Schools also require that pastors, parish life directors or principals discuss with the Director of Human Resources any disciplinary action that may result in probation, suspension or termination.***

- ✓ Is there any reason to be concerned about potential “wrongful discharge” issues?  
There would be reason to be concerned about discharging an employee who had:
- Filed a workers compensation claim
  - Was close qualifying for a pension under vesting rules
  - Recently complained about overtime or minimum wage issues
  - Recently complained about safety in the workplace
  - Recently complained about discrimination
  - Recently served on jury duty
  - Recently filed for bankruptcy
  - Recently had their wages garnished.

While the existence of any of these issues might not prevent the parish from terminating the employee, these facts are cause to stop and assure that the reasons for the termination are unrelated to these illegal reasons. Parish leaders who proceed with termination in the face of some of these circumstances must be able to clearly demonstrate that the reasons for the termination are unrelated to the protected activity referred to in the checkmarks above.

### **18. Exit Interviews**

When an employee leaves employment, it may be for a number of reasons. In addition, the employee may have reasons for leaving employment that are not disclosed at the time of the resignation or termination. An exit interview process allows the employer to:

- (1) Answer any employee questions regarding the consequences of leaving, such as benefits, etc.
- (2) Learn the true reasons for leaving;
- (3) Understand the employee’s motivations and feelings about their work experience;
- (4) Understand whether there are any potential legal ramifications from the employee’s departure;
- (5) Provides the employer with an opportunity to correct any hard feelings or misperceptions that may have led to the departure;
- (6) Allows the employer to determine if there is any inappropriate behavior occurring among the remaining staff;
- (7) Allows the employer an opportunity to assess need for improvement in supervision skills, work processes, etc.

The exit interview can be conducted by anyone connected with the parish/school. A sample form that can be used is included below.



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## **19. Personnel Recordkeeping and Documentation**

Appropriate supervision of employees requires that the supervisor create and maintain appropriate documentation governing the employment relationship. Sometimes, not enough documentation is created. Sometimes, documentation is not kept when it should be. Following are some general guidelines on appropriate documentation.

### ***What documents should you create?***

**Hiring:** When hiring an employee, even if it is an informal hiring for a parish position, each person considered for the position should fill out an employment application, which gathers basic information about the applicant. In addition, documents that should be created regarding the hiring process include information on references that are checked, interview questions that are asked, etc. Applicants who are not hired should be sent a confirming letter. Sample application and hiring forms are available in this Manual.

**Job Descriptions:** Create a job description for every position, and when an employee fills a position, review the job description to make sure it accurately describes what you would like that person to do. Sample job descriptions and forms are included in this Manual.

**Performance:** When you have discussions with employees about their performance, document the discussion. Employees should be provided a formal review of their performance at least yearly, and those discussions should be documented. This Manual includes sample forms which should assist parishes with the performance planning process.

**Discipline:** When you take steps to discipline an employee, document the events that lead to the discipline, and the steps you took. Include information on the dates that events occurred, who were present, any information you gathered in assessing what to do, and any formal discussion you had with the employee. If you provide the employee with a memo detailing that discussion, have the employee sign that they received it, and place the signed copy in the file.

**Termination:** If you terminate an employee, create a document describing all of the circumstances surrounding your decision to terminate. Remember, all terminations should be reviewed with the Human Resources Director prior to informing the employee of the decision.

### ***What documents should you keep?***

Create a personnel file for each employee at the parish/school level. Records contained in this file should be kept in a confidential, locked place, where only the supervisor has access. If the parish/school leader grants permission to anyone to access such files to assist in their maintenance, the person with access should be instructed about confidentiality and privacy of the information.

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**Medical records:** If you obtain any medical information on an employee, that information should be kept in a file separate from the personnel file, in a confidential place, and only the parish/school leader/principal should have access to the file.

### **Documents contained in parish/school personnel files:**

- Applications/resumes/hiring information
- Job description
- Time cards or payroll records
- Employee information such as full name, address, emergency contact
- Information on the employees rate of pay
- Attendance records
- Performance evaluations
- Disciplinary notes
- Garnishments
- Benefit information
- Acknowledgement of receipt of personnel policies (Form F)
- Any commendations or records regarding employee achievements
- FMLA Records
- Individual Contracts
- Copy of Background Check Authorization

### **Documents contained in the Finance Office at the Diocese of Boise**

- Employee Data Form
- I-9 Employment Eligibility Verification Form
- I-9 documentation of work authorization (Lists of documents that establish employment eligibility found on page 3 of I-9 form.)
- W-4 and M-4 Withholding certificates
- Direct deposit w/voided check (optional)
- Cigna Enrollment Form
- Pension/Beneficiary designation
- Life/LTD Enrollment Form
- Flex Account Form (optional)
- 403(B) 7 Form (optional)
- Signed Benefit and Compensation Reduction Agreement
- Payroll records relating to pay, earnings and deductions
- Signed time records by staff and supervisor
- Employee Driver Form
- Copy of Personal Auto Insurance Policy
- Acknowledgement of Travel Policy

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### *How long should you keep documents?*

Federal law requires that employers keep certain records for a specific period of time. Some examples are: Applications/resumes (one year); Job advertisements (one year); overtime records (three years); FMLA records (three years) Consult the policies and practices manual for the diocesan records retention policy.

***Because of the complexity of these laws, and their varying requirements, we recommend that you retain all documents pertaining to a particular employee for AT LEAST THREE YEARS AFTER THE DATE OF TERMINATION.***

### **20. Conclusion**

Human resources are the most valuable resources of a parish/school. Good stewardship of those resources mandates that parishes/schools apply Christian human resource principles. This Manual is intended to provide guidance to parish/school leaders in the process of managing parish/school employees. Any questions not answered in this Manual can be directed to the Human Resources Director.

# ***APPENDICES***

***APPENDIX A***

***JOB DESCRIPTIONS***

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# Sample Job Descriptions

### **TEMPLATE FOR THE CREATION OF JOB DESCRIPTIONS**

*Use this template as a guide for creating job descriptions for all parish positions, whether employee or volunteer*

#### **Diocese of Boise Job Description**

**POSITION:** (This is the title chosen for this position. Make sure that it is consistent with the job duties and that it accurately describes the role. Recommended titles are: “Pastoral Associate/Administration” “Pastoral Associate/Religious Education” or some consistent title, but other titles may also be used at the parish or school level such as “Office Secretary” “Receptionist” “Office Manager”, etc.)

**APPOINTED BY:** (This is the person who is the appointing authority, in a parish setting this would normally be the pastor, in the school it would be the principal)

**RESPONSIBLE TO:** (This is the person that the incumbent in this job will report to on a daily basis.)

**COLLABORATES WITH:** (In many positions in church work, the incumbent will report to a particular person, but is required to collaborate with many others. This might be the case where several parishes share a youth minister, or where one parish has many different roles such as youth ministry, religious education, adult formation, etc. Care should be taken to assure that the reporting and collaboration structure is well planned, because this affects the performance planning and evaluation process, and poor supervisory structure leads to inconsistent direction and performance issues.)

**STATUS:** (This is the exempt/non-exempt status of the position for purposes of the FLSA. Consult with the Diocesan Director of Human Resources if there are questions about the status of a particular position. If this position is a volunteer position, this line should read “Volunteer”)

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**Vision:** (In this section, the essential vision and mission of the ministerial position should be described. All positions in the church have root in our essential ministry, and thinking about and establishing the vision for each ministry helps to focus the necessary job duties and responsibilities so that they further the mission and ministry of the parish or school. )

**Definition:** (This section helps to define the essential purpose or the position, and why it exists.)

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**Primary function:** (This section gives a broad general explanation of the primary day to day functions of the position.)

**Required Education and Experience:** (This section should list the education and experience necessary to perform this position well. DO NOT list only the education and experience of the person currently holding the position, but instead focus on what education and experience should be required for the position. You can make a distinction between what is required and essential, and what is recommended. These criteria will then be used in recruiting and hiring for this position in the future.)

**Required Knowledge, Skills and Abilities:** (This section should list all of the knowledge, skills and abilities (KSAs) required to adequately perform this position. Remember, this should not be the KSAs of the incumbent, but instead should focus on the job itself and the KSAs required to perform the job well. Focus on the knowledge that is required (knowledge of computer systems, bookkeeping methods, parish practices, etc.) the skills necessary (budgeting skills, telephone skills, people skills, etc.) and abilities (ability to organize material, ability to keep track of detail, etc.).

**Personal Characteristics:** (In this section the job description should list the personal characteristics of the person who should fill this position. You can list things related to the handling stress, positive attitude, faith requirements, cooperation, compassion, etc.)

**Essential Duties and Responsibilities:** (This is the section where you include detailed lists of the types of duties and responsibilities that this person will handle. Great care should be taken to assure that all the job duties are listed, without bogging down in too much detail about HOW the duties are to be performed. Thus, it is enough to list that the person is responsible for reconciling the checkbook on a monthly basis, without detailing the physical process for doing the reconciliation. It is sometimes helpful to divide the essential duties and responsibilities into areas, such as responsibilities for administration, bookkeeping, liturgy, maintenance, recordkeeping, etc. If you have difficulty with this section, try having the incumbent keep a log for a few days of all the things performed within this job.)

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### **POSITION ANALYSIS INFORMATION FORM**

Your Position Title: \_\_\_\_\_

Date: \_\_\_\_\_

Your Name: \_\_\_\_\_

Supervisor's Title: \_\_\_\_\_

Supervisor's Name: \_\_\_\_\_

Average Hours Worked Per Week: \_\_\_\_\_

1. What is the general purpose of your position?
2. What was your last position? If it was in another organization, please name it. What duties did you perform in that position?
3. From your current position, to what position would you normally be promoted?
4. If you regularly supervise others, list them by name and position title.
5. If you supervise others, please check those activities that are part of your supervisory responsibilities:
  - Hiring (you make the decisions as to who will be hired or you have significant input into the decision making process)
  - Promoting (you make the decisions as to promotions, or you have significant input and your recommendations are generally followed)
  - Compensating (you decide how much individuals on staff will be paid)
  - Training (you are the primary person responsible for training others on how to perform their position)
  - Budgeting (you are the primary person who recommends what the budget for your work should be)
  - Disciplining (you are the primary person who decides on discipline for employees under your supervision)
  - Scheduling (you decide what schedules your subordinates will work)
  - Directing (you direct the work assignments of your subordinates)
  - Terminating (you are the primary decision maker on termination decisions, or your recommendations are generally followed)
  - Developing (you are primarily responsible for the ongoing formation and skill building for your subordinates)

## ***Roman Catholic Diocese of Boise***

- Measuring Performance (you are the primary person responsible for assessing the performance of your subordinates)
- Other

6. *Job Responsibilities*: Please describe what you do. Indicate those responsibilities you consider to be most important and/or most difficult. Attach a job description if you have one, and note any places where duties have been added or deleted.

a. Daily responsibilities:

b. Periodic responsibilities (Please indicate whether weekly, monthly, quarterly, etc.):

c. How long have you been performing these responsibilities?

d. Are you now performing unnecessary responsibilities? If yes, please describe.

e. Should you be performing duties that are not currently included in your responsibilities? If yes, please describe.

7. *EDUCATION*: Please check the educational requirements for your position, **not your own educational background**.

- High school diploma or equivalent
- Associate's degree
- Bachelor's degree
- Master's degree
- Professional license/specialized training

List advanced degrees, special training, or specific professional license required for your position (not necessarily the education you have).

Please indicate the education you had when you started this position.

8. *EXPERIENCE*: Please specify the amount needed to perform your responsibilities.

- No experience
- One to three years
- Three to five years
- Five to ten years

## *Roman Catholic Diocese of Boise*

Please indicate the experience you had when you started this position.

What type of experience would be required for your position?

9. *SKILL*: Please list any specific skills required in the performance of your position. (For example, amount of accuracy required, alertness, precision in working with described tools, methods, systems, computer expertise, telephone skills, communication skills, etc.)

10. *EQUIPMENT*: If your position requires you to use any equipment and/or computer programs, please list the equipment and check how often you use it. Please use a separate sheet if necessary.

<u>Equipment/Programs</u>	<u>Rarely</u>	<u>Occasionally</u>	<u>Frequently</u>
---------------------------	---------------	---------------------	-------------------

a.

b.

c.

11. *Supervision Required*. In performing your job duties, how often do you consult with your supervisor to determine the method of completing your job tasks?

Do your assignments come directly from your supervisor, or do you have some control in determining your own assignments?

How much of your position requires planning future projects?

Who finally determines the objectives, goals, and mission for your position?

Do you perform tasks for which you do not seek any direction from a supervisor? If so, please describe:

In performing those tasks which do not require supervision, do you consult written guidelines or procedures for determining the best course of action?

Do you participate in formulating written guidelines or procedures, and in what way?

In performing tasks, how much discretion do you have in completing the task in a method you desire?

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12. What percentage of your time is spent on the following tasks (you may want to measure your time on a typical day to determine accurate percentages):

Telephone communications:

Responding to questions from constituents:

Providing information to others in the department:

Providing information to others outside the department (describe)

Providing information to others outside the DPC (describe)

Computer work (list the percentages attributable to working in each different computer program):

Research:

Department or building meetings:

Drafting documents:

Copying and printing:

Preparing correspondence:

Filing:

Other activities not noted above:

## *Roman Catholic Diocese of Boise*

# Sample

## **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	Pastor
<b>APPOINTED BY:</b>	Diocesan Bishop
<b>RESPONSIBLE TO:</b>	Diocesan Bishop
<b>COLLABORATES WITH:</b>	Parochial Vicars; Deacons; Lay Employees; Deanery Clergy and Pastoral Leadership
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, pastors are called to serve and be faithful to the local and universal Church. The pastor serves as the Bishop's representative to the people of God in Idaho. He promotes Gospel values and growth in holiness, values collaboration and partnership in mission and ministry, and recognizes the necessity for professional preparation and ongoing formation.

**Definition:** A pastor is a minister who is entrusted by the Bishop with the exercise of the pastoral care of a parish. The pastor is appointed by the Bishop and is responsible to the Bishop. In collaboration with the parish staff and assigned deacons, the pastor has the responsibility of overseeing the pastoral care and organizational leadership for a parish community. The pastor is responsible for facilitating the growth of a parish that is ministerially complete and fiscally sound. The pastor coordinates the ministries of the parish, is sensitive to the various needs of the community, and is to be a unifying presence within the faith community. The pastor enables and empowers the community to be a sign of the Kingdom of God. (Cf. cc. 519, 521, 528, 529, 530)

**Primary function:** The pastor is the spiritual and administrative leader of a parish, and provides day to day direction for the general operation of the parish, and directs ministries of worship, education, human concerns and administration. The pastor serves as the visible leader of the parish community. The pastor strives to develop and accomplish the parish's mission within the diocese. The pastor works in cooperation with other parish leadership to motivate, enable and affirm the parish community in its efforts.

## ***Roman Catholic Diocese of Boise***

### **Required Education and Experience:**

- A pastor must be a priest with a Masters degree in Divinity, Theology, or Pastoral Ministry.
- To become a pastor, a priest must normally have a minimum of four years of experience in parish based ministry. Experience in areas such as sacramental rites, liturgy of the word and communion services, prayer, public speaking, canon law, tribunal processes, team ministry, maintaining confidentiality, budgeting and finance preferred.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of an organization or program.
- Demonstrated communication skills, including public speaking and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish community and programs.
- Demonstrated skill in promoting the role of the laity in parish leadership.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to delegate tasks where appropriate.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.

## ***Roman Catholic Diocese of Boise***

- Must be able to respond to and challenge the existing structure/systems, be an agent for change.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The pastor has duties and responsibilities in four main areas of parish life: ministry of worship, ministry of education, human concerns, and administration.

### **Ministry of Worship**

- Leads the parish community's sacramental life, including responsibility for arranging for, himself or through designees, sacraments through RCIA, Baptism, Confirmation, Eucharist, Reconciliation, and Marriage. Responsible for assuring that anointing of the sick and funeral services are available. Presides at ceremonies and liturgical celebrations.
- Administers or coordinates administration of sacramentals and blessings where appropriate.
- Preaches at Sunday and weekday liturgies.
- Schedules the regular celebration of the Eucharist through Mass and Communion services.
- Oversees the recruitment, scheduling and coordination of services of liturgical ministers, music ministers, lectors, cantors, servers, acolytes, Extra Ordinary Eucharist Ministers, and ministers of environment or hospitality.
- Communicates with and collaborates with other priests in their liturgical duties.
- Serves as an ordinary minister of Eucharist and viaticum.
- Coordinates the planning of liturgical celebrations.
- Supports programs of evangelization and ecumenism.

# *Roman Catholic Diocese of Boise*

## **Ministry of Education**

- Preaches at liturgies.
- Oversees the education and spiritual development of the parish community by providing programs for the faith development of children, youth, young adults, adults, aging and multicultural populations.
- Provides for and directs the preparation of persons to receive the sacraments of Baptism, Marriage, Confirmation, Eucharist and Reconciliation, and Anointing of the Sick.
- Supervises the recruitment and work of teachers, catechists, pastoral ministers and other lay leaders involved in education and faith formation ministry, and provides for continuing formation.
- Works with parish school boards and personnel to assist in the delivery of appropriate Catholic school education.
- Provides formation and direction for parishioners participating in various programs.
- Where appropriate, serves as teacher for faith formation, RCIA, sacramental preparation and other educational programs of the parish.
- Is concerned for a continual renewal of his own education and learning, such as by attending workshops, retreats and study days, including mandatory attendance at regularly scheduled diocesan priest retreats, study days and Convocations.

## **Human Concerns**

- Participates in active ministry for human concerns.
- To assure pastoral care/pastoral counseling is available to those in need.
- Assesses needs of the parish population for pastoral care and concern, particularly the needs of youth, the aging population, the disadvantaged and special populations, the sick and dying, and establishes and directs appropriate programs addressing those needs.
- Creates a community atmosphere within the parish where all have a sense of belonging.
- Supports coordination of services and advocacy to individual and groups needing food, shelter, and medical assistance.

## ***Roman Catholic Diocese of Boise***

- Supports outreach to the community at large in addressing basic human needs and social justice concerns.
- Exercise appropriate self-care, by involvement in priest support groups and adequate time off from ministry.

### **Administration**

- Encourages parish communities to formulate and articulate their mission/vision and helps en flesh that vision.
- Oversees material assets of the parish, including finances, buildings, stewardship, resource development and budget in accordance with canonical and diocesan norms as well as federal, state and local laws.
- Directs appropriate financial accounting practices.
- Works with parish, pastoral and finance councils, School Boards, and Diocesan officials to establish sound budgeting practices.
- Maintains sacramental and civil records as mandated by church and civil regulations.
- Serves as human resource coordinator for the parish, consulting with the Diocesan Director of Human Resources as appropriate.
- Provides appropriate formation, education, training and evaluation of parish staff. Enables, encourages and develops lay leadership on all levels.
- Supervises all parish staff, making all hiring, supervision, performance assessment, discipline and termination decisions; abiding by all diocesan policies and guidelines, especially in regards to personnel issues.
- Establishes, supports and consults with parish pastoral and finance councils and various committees who can provide consultation and advice in the administration of the parish.
- Oversees parish repairs and construction.
- Participates in effective fundraising campaigns where necessary and appropriate.
- Establishes, in collaboration with other parish leadership, appropriate parish mission and vision statements, goals, objectives and long range planning.

## ***Roman Catholic Diocese of Boise***

- Oversees effective interaction with the Diocese by:
  - ✓ Familiarity with all diocesan policies, handbooks, and procedures;
  - ✓ Promoting the implementation of the Diocesan pastoral plan;
  - ✓ Abiding by all Diocesan guidelines and policies and directions;
  - ✓ Providing for communication links between parish and diocese;
  - ✓ Promoting effective implementation of Deanery Pastoral Councils;
  - ✓ Active participation in Deanery meetings;
  - ✓ Submission of all necessary information concerning parish operation to Diocesan offices upon request;
  - ✓ Utilization of Diocesan resources where appropriate.
  - ✓ Representing the parish at deanery or diocesan events.
  
- Provides support and direction to school principals and staff (when school is present) on an “as needed” basis.
  
- Supervises school principal, and works collaboratively with school board (where school is present).
  
- Participates in continuing education and retreats to continue his own formation in ministry.

## *Roman Catholic Diocese of Boise*

# Sample

### **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Parochial Vicar</b>
<b>APPOINTED BY:</b>	Diocesan Bishop
<b>RESPONSIBLE TO:</b>	Diocesan Bishop; Pastor
<b>COLLABORATES WITH:</b>	Pastor; Deacons; Lay Employees; Deanery Clergy and Pastoral Leadership
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, parochial vicars are called to serve and be faithful to the local and universal Church, through their service in partnership with a pastor of a particular parish.

**Definition:** The Parochial Vicar is a partner of and collaborator of the Pastor in all areas of parish ministry. The position exercises a level of responsibility as designated by the Pastor for the spiritual, liturgical, social, formative, educational and administrative aspects of parish life. In the absence of the pastor, may be called upon to make short-term decisions that affect the life and welfare of the parish. The parochial vicar assists the pastor in enabling and empowering the community to be a sign of the Kingdom of God. (Cf. cc. 533, §3, 541, 548, 549).

**Primary function:** The parochial vicar, working at the direction of the pastor, assists in the day to day direction of the general operation of the parish, and assists as needed with ministries of worship, education, human concerns and administration. On a day-to-day basis the Associate Pastor takes care of administrative duties as delegated by the Pastor. In the Pastor's absence he is responsible for short-term decisions about the welfare of the parish: check signing, emergency repairs, etc.

#### **Required Education and Experience:**

- A parochial vicar must be a priest with a Masters degree in Divinity, Theology, or Pastoral Ministry.
- A working knowledge of all major areas of theology, especially liturgy, homiletics, canon law, scripture, sacramental, dogmatic and moral theology.

## *Roman Catholic Diocese of Boise*

### **Required Knowledge, Skills and Abilities:**

- Demonstrated communication skills, including public speaking and written communication.
- Demonstrated skill in promoting the role of the laity in parish leadership.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to delegate tasks where appropriate.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The parochial vicar has duties and responsibilities in four main areas of parish life: ministry of worship, ministry of education, human concerns, and administration.

#### **Ministry of Worship**

- Presides and preaches at the Sunday liturgy as well as weekday liturgies, funerals, marriages, other celebrations of the Sacraments, and scheduled liturgies at nursing home facilities, as agreed upon with the pastor.

## ***Roman Catholic Diocese of Boise***

- Collaborates with pastor and professional staff persons to promote well prepared and well-executed liturgical celebrations. (This may include, musicians, members of the parish Worship Commission, RCIA Leadership, those who help with the art and environment needs in the church and the bereavement group.)
- In collaboration with the pastor, works to assure that anointing of the sick and funeral services are available
- Assists in the recruitment, scheduling, training and coordination of services of liturgical ministers, music ministers, lectors, cantors, servers, acolytes, Extra Ordinary Eucharist Ministers and ministers of environment or hospitality.
- Communicates with and collaborates with other priests in their liturgical duties.
- Serves as an ordinary minister of Eucharist and viaticum.
- Assists in the planning of liturgical celebrations.
- Supports programs of evangelization and ecumenism.

### **Ministry of Education**

- Assists in the education and spiritual development of the parish community by participating, in collaboration with the pastor, in programs for the faith development of children, youth, young adults, adults, aging and multicultural populations.
- Assists in the preparation of persons to receive the sacraments of Baptism, Marriage, Confirmation, Eucharist and Reconciliation, and Anointing of the Sick.
- Assists in the recruitment and work of teachers, catechists, pastoral ministers and other lay leaders involved in education and faith formation ministry, and participates in their continuing formation as requested by the pastor.
- Where assigned to a parish with a school, assists the pastor in providing spiritual support for the school personnel and students.
- Assists in providing formation and direction for parishioners participating in various programs.
- Where appropriate and as requested by the pastor, serves as teacher for faith formation, RCIA, sacramental preparation and other educational programs of the parish.

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## **Human Concerns**

- Participates in active ministry for human concerns.
- Collaborates with the pastor in providing for the needs of the parish population for pastoral care and concern, particularly the needs of youth, the aging population, the disadvantaged and special populations, and assists with programs addressing those needs.
- Helps to create a community atmosphere within the parish where all have a sense of belonging.
- Supports coordination of services and advocacy to individual and groups needing food, shelter, and medical assistance.
- Supports outreach to the community at large in addressing basic human needs and social justice concerns.
- Is available for private spiritual direction to members of the parish.
- Where approved by the pastor, serves as Procurator/Advocate for those petitioning for an annulment.

## **Administration**

- Collaborates with the pastor in his role as overseer of the material assets of the parish, including finances, buildings, stewardship, resource development and budget.
- Assists the pastor in providing appropriate formation, education, training and evaluation of parish staff.
- Assists in supervising parish staff.
- Attends parish pastoral and finance council and various committee meetings.
- Assists pastor in fundraising campaigns where necessary and appropriate.
- Effectively participates in interaction among clergy in the Diocese by:
  - ✓ Familiarity with all diocesan policies, handbooks and procedures;
  - ✓ Promoting the implementation of the Diocesan pastoral plan;
  - ✓ Abiding by all Diocesan guidelines and policies;
  - ✓ Providing for communication links between parish and diocese;
  - ✓ Active participation in Deanery meetings;

## ***Roman Catholic Diocese of Boise***

- ✓ Submission of all necessary information concerning parish operation to Diocesan offices upon request;
  - ✓ Utilization of Diocesan resources where appropriate.
  - ✓ Representing the parish at deanery or diocesan events.
- 
- Participates in continuing education and retreats to continue his own formation in ministry, including required attendance at diocesan priest study days, retreats and Convocations.

*Roman Catholic Diocese of Boise*

*Sample*

**DIOCESE OF BOISE  
JOB DESCRIPTION**

<b>POSITION:</b>	<b>Parish Life Director</b>
<b>APPOINTED BY:</b>	Diocesan Bishop
<b>RESPONSIBLE TO:</b>	Priest Moderator
<b>COLLABORATES WITH:</b>	Priest Moderator and Sacramental Minister
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, these ministers are called to serve and be faithful to the local and universal Church. He or she promotes Gospel values and growth in holiness, values collaboration and partnership in mission and ministry, and recognizes the necessity for professional preparation and ongoing formation.

**Definition:** A Parish Life Director is a professional minister who is entrusted by the Bishop with “a participation in the exercise of the pastoral care of the parish.” (c. 517.2) The Parish Life Director is appointed by the Bishop and is responsible to the Priest Moderator. In collaboration with a Priest Moderator and a Sacramental Minister, the Parish Life Director has the responsibility of overseeing the pastoral care and organizational leadership for a parish community without a pastor. The Parish Life Director coordinates the ministries of the parish, is sensitive to the various needs of the community, and is to be a unifying presence within the faith community. The Parish Life Director enables and empowers the community to be a sign of the Kingdom of God. (As promulgated by the Bishop of Boise, September 23, 2002)

**Primary function:** The Parish Life Director provides day to day direction for the general operation of the parish, and directs ministries of worship, education, human concerns and administration. The Parish Life Director serves as the visible leader of the parish community. The Parish Life Director strives to develop and accomplish the parish’s mission within the diocese. The Parish Life Director works in cooperation with other parish leadership to motivate, enable and affirm the parish community in its efforts.

## ***Roman Catholic Diocese of Boise***

### **Required Education and Experience:**

- Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX.
- Normally, a minimum of four years of experience in parish based ministry. Experience in Idaho preferred. Experience must include leadership roles. Experience in areas such as sacramental rites, liturgy of the word and communion services, prayer, public speaking, canon law, tribunal processes, team ministry, maintaining confidentiality, budgeting and finance preferred.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of an organization or program.
- Demonstrated communication skills, including public speaking and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish community and programs.
- Demonstrated skill in promoting the role of the laity in parish leadership.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to delegate tasks where appropriate.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.

## ***Roman Catholic Diocese of Boise***

- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The Parish Life Director has duties and responsibilities in four main areas of parish life: ministry of worship, ministry of education, human concerns, and administration.

### **Ministry of Worship**

- Has a leadership role in the parish community's sacramental life, including responsibility for arranging for RCIA, Baptism, Confirmation, Eucharist, Reconciliation, Marriage, Anointing and funeral services. Presides at ceremonies and liturgical celebrations as appropriate.
- Administers or coordinates administration of sacramentals and blessings where appropriate.
- Preaches when pastorally and canonically appropriate.
- Schedules and/or arranges for the regular celebration of the Eucharist through Mass and Communion services, subject to the provisions of the code of canon law and Diocesan norms.
- Oversees the recruitment, scheduling and coordination of services of liturgical ministers, music ministers, lectors, cantors, servers, acolytes, Extra Ordinary Eucharist Ministers and ministers of environment or hospitality.
- Communicates with and collaborates with the priest moderator, sacramental minister and other priests in their liturgical duties as specified by canon law.
- Serves as an extraordinary minister of Eucharist and viaticum.
- Coordinates the planning of liturgical celebrations.

## ***Roman Catholic Diocese of Boise***

- Supports programs of evangelization and ecumenism.

### **Ministry of Education**

- Preaches when pastorally and canonically appropriate.
- Oversees the education and spiritual development of the parish community by providing programs for the faith development of children, youth, young adults, adults, aging and multicultural populations.
- Provides for and directs the preparation of persons to receive the sacraments of Baptism, Marriage, Confirmation, Eucharist and Reconciliation, and Anointing of the Sick.
- Supervises the recruitment and work of teachers, catechists, pastoral ministers and other lay leaders involved in education and faith formation ministry, and provides for continuing formation.
- Works with parish school boards and personnel to assist in the delivery of appropriate Catholic school education.
- Provides formation and direction for parishioners participating in various programs.
- Where appropriate, serves as teacher for faith formation, RCIA, sacramental preparation and other educational programs of the parish.

### **Human Concerns**

- Participates in active ministry for human concerns.
- Assesses needs of the parish population for pastoral care and concern, particularly the needs of youth, the aging population, the disadvantaged and special populations, and establishes and directs appropriate programs addressing those needs.
- Creates a community atmosphere within the parish where all have a sense of belonging.
- Supports coordination of services and advocacy to individual and groups needing food, shelter, and medical assistance.
- Supports outreach to the community at large in addressing basic human needs and social justice concerns.

# *Roman Catholic Diocese of Boise*

## **Administration**

- Oversees material assets of the parish, including finances, buildings, stewardship, resource development and budget in accordance with canonical and diocesan norms as well as federal, state and local laws.
- Directs appropriate financial accounting practices.
- Works with parish pastoral and finance councils, School Boards, and Diocesan officials to establish sound budgeting practices.
- Maintains sacramental and civil records as mandated by church and civil regulations.
- Serves as human resource coordinator for the parish.
- Provides appropriate formation, education, training and evaluation of parish staff.
- Supervises all parish staff, making all hiring, supervision, discipline and termination decisions; abiding by all policies, guidelines, etc. especially in regards to personnel issues.
- Establishes, supports and consults with parish pastoral and finance councils and various committees who can provide assistance in the administration of the parish.
- Oversee parish repairs and construction.
- Participates in effective fundraising campaigns where necessary and appropriate.
- Establishes, in collaboration with other parish leadership, appropriate parish mission and vision statements, goals, objectives and long range planning.
- Oversees effective interaction with the Diocese by:
  - ✓ Familiarity with all diocesan policies, handbooks, and procedures;
  - ✓ Promoting the implementation of the Diocesan pastoral plan;
  - ✓ Abiding by all Diocesan guidelines and policies;
  - ✓ Providing for communication links between parish and diocese;
  - ✓ Promoting effective implementation of Deanery Pastoral Councils;
  - ✓ Active participation in Deanery meetings;
  - ✓ Submission of all necessary information concerning parish operation to Diocesan offices upon request;
  - ✓ Utilization of Diocesan resources where appropriate.
  - ✓ Representing the parish at deanery or diocesan events.

## ***Roman Catholic Diocese of Boise***

- Provides support and direction to school principals and staff (when school is present) on an “as needed” basis.
- Supervises school principal, and works collaboratively with school board (where school is present).
- Meets regularly with the Priest Moderator and Sacramental Minister.

## *Roman Catholic Diocese of Boise*

# *Sample*

## **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Pastoral Associate<sup>2</sup></b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Pastor and Parish Staff
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, this minister is called to serve and be faithful to the local and universal Church, through service in collaboration with a pastor<sup>3</sup> of a particular parish. This minister also provides for continuing formation in the Catholic faith by coordinating faith formation and religious education programs at the parish level.

**Definition:** The Pastoral Associate is a professional minister who is entrusted by the pastor with the day to day administration of the parish. In collaboration with the pastor, the Pastoral Associate has the responsibility of overseeing the office staff and the work of the parish in the manner consistent with the mission and vision of the parish and the views of the pastor. In collaboration with the pastor, the Pastoral Associate also has the responsibility of overseeing the faith formation and education of the children, youth and adults of the parish.

### **Primary function:**

The Pastoral Associate, in collaboration with the pastor, administers the parish in accordance with sound financial and administrative practices. The position exercises a level of responsibility as designated by the pastor for the spiritual, liturgical, social, formative, educational and administrative aspects of parish life. In the absence of the pastor, the Pastoral Associate may be called upon to make short-term decisions that affect the life and welfare of

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<sup>2</sup> Pastoral Associate is a generic term used to describe this parish leadership position. Each parish has the ability to shape the duties of the pastoral associate to meet their specific needs, goals and objectives. The duties of the pastoral associate can be selected from the ideas suggested in this document, or the parish can broaden the duties to include additional tasks in a small parish, or the tasks described in this document can be divided among more than one person. Additional job descriptions that follow can be used when a pastoral associate has more limited responsibilities, such as for only one aspect of faith formation.

<sup>3</sup> For purposes of this document, the term “pastor” is used to refer to the assigned parish leader, whether a pastor, administrator, or parish life director.

## ***Roman Catholic Diocese of Boise***

the parish. This includes responsibility for the development and supervision of faith formation and religious education for children, young people, and adults, including youth ministry programs, from pre-school through high school. Responsibilities of this position include elements of catechesis, evangelization, spirituality, liturgy and guidance for child, youth and adult learners. The Pastoral Associate also assesses needs of parish adults in the areas of spiritual, intellectual, emotional and religious growth, assists parish adults and volunteers in the development, implementation and maintenance of programs to meet the ascertained needs, and supervises volunteers and other personnel, conducts or coordinates RCIA and Adult Sacramental Preparation programs as well as adult formation, counseling and spiritual direction.

### **Required Education and Experience:**

- Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX. Bachelor's degree in business, finance or related discipline.
- Normally, a minimum of four years of experience in parish based ministry is required. Experience must include leadership roles. Experience in administrative and supervisory roles preferred.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of parish programs.
- Demonstrated communication skills, including public speaking, teaching, and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish educational programs.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Familiarity with the psychology of child and youth learners and effective teaching methods for various age groups.
- Ability to delegate tasks where appropriate.
- Bilingual skills as needed to minister effectively in parish.

## *Roman Catholic Diocese of Boise*

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The Pastoral Associate has the following duties and responsibilities:

#### **Administration**

- Collaborates with the pastor in his role as overseer of the material assets of the parish, including finances, buildings, stewardship, resource development and budget.
- Coordinates and conducts the affairs of the parish in an organized and efficient manner.
- Implements policies developed by the pastor or leadership councils.
- Maintains personnel and other records for the parish.
- Assists the pastor in providing appropriate formation, education, training and evaluation of parish staff.
- Assists in supervising parish staff.
- Attends parish pastoral and finance council and various committee meetings where requested to do so by the pastor.

## ***Roman Catholic Diocese of Boise***

- Assists pastor in fundraising campaigns where necessary and appropriate.
- Effectively administers the parish by maintaining:
  - Familiarity with all diocesan policies, handbooks, and procedures;
  - Promoting the implementation of the Diocesan pastoral plan;
  - Abiding by all Diocesan guidelines and policies;
  - Providing for communication links between parish and diocese;
  - Submission of all necessary information concerning parish operation to Diocesan offices upon request;
  - Utilization of Diocesan resources where appropriate.
  - Representing the parish at deanery or diocesan events where requested to do so by the pastor.
- Participates in continuing education and retreats to continue his/her own formation in ministry.
- Oversees the education and spiritual development of the parish community through supervision of other staff members.
- Attends outside retreats, workshops and diocesan programs to obtain information and resources to further the goals of the parish.
- Works on personal formation, including any necessary certifications and continuing education.
- Perform additional duties as assigned by pastor/parish life director.

### **Education**

- Oversees the education and spiritual development of the parish community by providing programs for the faith development of children, youth and adult populations.
- Develops new educational programs where appropriate.
- Recruits participants for religious education and faith formation programs where appropriate.
- Supervises the recruitment and work of volunteer teachers, catechists, pastoral ministers and other lay leaders involved in education ministry, and provides for continuing formation for such ministers.
- Evaluates and provides guidance to catechists and teachers in faith formation and religious education programs.

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- Develops effective methods of encouraging enthusiasm, interest, participation, and learning suitable to the particular age of the learners involved.
- Is responsible for the recruitment of volunteer teachers, catechists, youth ministers and team members for both Youth Ministry and Hispanic Youth ministry programs.
- Provides for continuing formation of youth ministers.
- Develops resources and is familiar with tools useful in education ministry including audio visual and computer based resources.
- Develops and evaluates curriculum content including tests, supplemental materials, resources and available materials to meet the needs of the religious education program, consistent with the direction of the parish religious education board, and Diocesan guidelines.
- Works with parish schools and personnel to assist in the delivery of Catholic school religious education, where needed.
- Serves as teacher for sacramental preparation and other youth educational programs of the parish, including preparation for First Communion, First Reconciliation and Confirmation, as well as coordinate parent meetings and educational opportunities for such sacramental preparation.
- Coordinate and direct retreats, social activities, outreach programs, liturgies and community service opportunities for those involved in education programs.
- Develops communication programs and methods for informing parents and parishioners about faith formation and religious education programs.
- Maintains student registrations, permanent records and teacher records for religious education programs.
- Maintains the resources library.
- Works with other parish ministers to prepare liturgies for religious education or faith formation programs.
- Works with the religious education program board to develop policy and plan programs, including keeping the board informed about religious education programs, and serving as an ex officio member of the board.
- Assures that the budget for education ministry is prepared and submitted to the pastor in a timely fashion.

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- Attends outside retreats, workshops and diocesan programs to obtain information and resources to further the goals of the religious education and faith formation programs.
- Works on personal formation, including any necessary certifications and continuing education in the areas of religious education.
- Perform additional religious education duties as assigned by pastor/parish life director.
- RCIA Responsibilities
  - Candidate Recruitment and Communication
    - Invites new candidates throughout the year and maintains communications.
    - Interviews candidates and arranges interview with other RICA team members.
  - Program Administration
    - Orders books, Bibles and resources
    - Keeps attendance
    - Provides registration process
    - Collects fees, etc.
    - Provides publicity (e.g., bulletin)
  - Program Design and Implementation
    - Coordinates RCIA Team
    - Periodically evaluates program and total process
    - Teaches in program as necessary
    - Liturgy Coordination - RCIA Rites
    - Arranges for dismissal rite during winter term
    - Works with liturgist and presiders on enrollment, election, Vigil, etc.
  - Godparents/Sponsors and Parish Involvement
    - Invites and assists godparents/sponsors
  - Coordinates godparents/sponsor program
  - Develops other ways to strengthen parish involvement in RCIA through education, supports families, dismissal, and hospitality.
- Adult Faith Formation
  - Directs and facilitates adult formation programs, e.g., RENEW, Scripture Study Groups, etc.
  - Coordinates and supervises volunteers/teams for these programs

## ***Roman Catholic Diocese of Boise***

- Works with Social Concerns Committee for outreach, bereavement, visitation of sick, etc.
- Prepares budget for adult faith development programs
- Provides direction and training to coordinators of programs

## *Roman Catholic Diocese of Boise*

# Sample

### **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Pastoral Associate for Administration</b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Pastor and Parish Staff
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, this minister provides are called to serve and be faithful to the local and universal Church, through their service in collaboration with a pastor of a particular parish.

**Definition:** The Pastoral Associate for Administration is a professional minister who is entrusted by the pastor or parish life director with the day to day administration of the parish. In collaboration with the pastor, the Pastoral Associate for Administration has the responsibility of overseeing the office staff and the work of the parish in the manner consistent with the mission and vision of the parish and the views of the pastor.

**Primary function:** The Pastoral Associate for Administration, in collaboration with the pastor, parish life director or administrator, administers the parish in accordance with sound financial and administrative practices. The position exercises a level of responsibility as designated by the Pastor for the spiritual, liturgical, social, formative, educational and administrative aspects of parish life. In the absence of the pastor, may be called upon to make short-term decisions that affect the life and welfare of the parish.

#### **Required Education and Experience:**

- Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX. Bachelor's degree in business, finance or related discipline.
- Normally, a minimum of four years of experience in parish based ministry is required. Experience must include leadership roles. Experience in administrative and supervisory roles preferred.

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### **Required Knowledge, Skills and Abilities:**

- Possesses an understanding of pastoral work and ministry.
- Demonstrated skill in administration of parish programs.
- Demonstrated communication skills, including public speaking, teaching, and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish educational programs.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to delegate tasks where appropriate.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

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### **Essential Duties and Responsibilities:**

The Pastoral Associate for Administration has the following duties and responsibilities:

- Collaborates with the pastor in his role as overseer of the material assets of the parish, including finances, buildings, stewardship, resource development and budget.
- Coordinates and conducts the affairs of the parish in an organized and efficient manner.
- Implements policies developed by the pastor or leadership councils.
- Maintains personnel and other records for the parish.
- Assists the pastor in providing appropriate communication, formation, education, training and evaluation of parish staff.
- Assists in supervising parish staff.
- Attends parish pastoral and finance council and various committee meetings where requested to do so by the pastor.
- Assists pastor in fundraising campaigns where necessary and appropriate.
- Effectively administers the parish by maintaining:
  - Familiarity with all diocesan policies, handbooks, and procedures;
  - Promoting the implementation of the Diocesan pastoral plan;
  - Abiding by all Diocesan guidelines and policies;
  - Providing for communication links between parish and diocese;
  - Submission of all necessary information concerning parish operation to Diocesan offices upon request;
  - Utilization of Diocesan resources where appropriate.
  - Representing the parish at deanery or diocesan events where requested to do so by the pastor.
- Participates in continuing education and retreats to continue his/her own formation in ministry.
- Oversees the education and spiritual development of the parish community through supervision of other staff members.

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- Attends outside retreats, workshops and diocesan programs to obtain information and resources to further the goals of the parish.
- Works on personal formation, including any necessary certifications and continuing education.
- Perform additional duties as assigned by pastor/parish life director.

## *Roman Catholic Diocese of Boise*

# Sample

## **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Pastoral Associate for Religious Education</b> (or Director of Religious Education or Faith Formation—this job description includes aspects of all elements of faith formation)
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Pastor and Parish Staff
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, this minister provides for continuing formation in the Catholic faith by coordinating formation and religious education programs at the parish level.

**Definition:** The Pastoral Associate for Religious Education (or DRE) is a professional minister who is entrusted by the pastor or parish life director with the education of the faithful of the parish. In collaboration with the pastor, the Pastoral Associate for Religious Education has the responsibility of overseeing the formation and education of the children and youth of the parish.

**Primary function:** The Pastoral Associate for Religious Education provides day to day direction for the childhood education functions of the parish. This includes responsibility for the development and supervision of religious education of children and young people, and youth ministry programs, from pre-school through high school. Responsibilities of this position includes: Elements of catechesis, evangelization, spirituality, liturgy and guidance for child and youth learners.

### **Required Education and Experience:**

- Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX.

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- Normally, a minimum of four years of experience in parish based ministry is required. Experience must include leadership roles. Experience in formation and religious education programs at all levels preferred.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of parish programs.
- Demonstrated communication skills, including public speaking, teaching, and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish educational programs.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort with all staff.
- Ability to delegate tasks where appropriate.
- Familiarity with the psychology of child, youth and adult learners and effective teaching methods for various age groups.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.

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- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The Pastoral Associate for Religious Education has the following duties and responsibilities:

- Oversees the education and spiritual development of the parish community by providing programs for the faith development of children and youth populations.
- Develops new educational programs where appropriate.
- Recruits participants for religious education programs where appropriate.
- Supervises the recruitment and work of volunteer teachers, catechists, pastoral ministers and other lay leaders involved in education ministry, and provides for continuing formation for such ministers.
- Evaluates and provides guidance to catechists and teachers in religious education programs.
- Develops effective methods of encouraging enthusiasm, interest, participation, and learning suitable to the particular age of the students involved.
- Is responsible for the recruitment of catechists and other volunteer help for both Youth Ministry and Hispanic Youth ministry programs.
- Provides for continuing formation of youth ministers.
- Develops resources and is familiar with tools useful in education ministry including audio visual and computer based resources.
- Develops and evaluates curriculum content including tests, supplemental materials, resources and available materials to meet the needs of the religious education program, consistent with the direction of the parish religious education board, and Diocesan guidelines.
- Works with parish schools and personnel to assist in the delivery of Catholic school religious education, where needed.

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- Coordinates for sacramental preparation and other youth educational programs of the parish, including preparation for First Communion, First Reconciliation and Confirmation, as well as coordinate parent meetings and educational opportunities for such sacramental preparation.
- Coordinate and direct retreats, social activities, outreach programs, liturgies and community service opportunities for those involved in education programs.
- Attends parish council meetings as an ex officio member where appropriate.
- Develops communication programs and methods for informing parents about religious education programs.
- Maintains student registrations, permanent records and teacher records for religious education programs.
- Maintains the resources library.
- Works with other parish ministers to prepare liturgies for religious education programs.
- Works with the religious education program board to develop policy and plan programs, including keeping the board informed about religious education programs, and serving as an ex officio member of the board.
- Assures that the budget for education ministry is prepared and submitted to the pastor/parish life director in a timely fashion.
- Attends outside retreats, workshops and diocesan programs to obtain information and resources to further the goals of the religious education programs.
- Works on personal formation, including any necessary certifications and continuing education in the areas of religious education.
- Perform additional religious education duties as assigned by pastor/parish life director.

## *Roman Catholic Diocese of Boise*

# Sample

## **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Pastoral Associate for Religious Education</b> (or Director of Religious Education, or Coordinator of Elementary Religious Education or Faith Formation—this description is limited to elementary faith formation duties.)
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Pastor and Parish Staff
<b>STATUS:</b>	Full time, Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, this minister provides for continuing formation in the Catholic faith by coordinating formation and religious education programs at the parish level.

**Definition:** The Pastoral Associate for Religious Education is a professional minister who is entrusted by the pastor or parish life director with the education of the faithful of the parish. In collaboration with the pastor, the Pastoral Associate for Religious Education has the responsibility of overseeing the formation and education of the children of the parish.

**Primary function:** The Pastoral Associate for Religious Education provides day to day direction for the childhood education functions of the parish. This includes responsibility for the development and supervision of religious education of children, from pre-school through junior high. Responsibilities of this position include elements of catechesis, evangelization, spirituality, liturgy and guidance for child learners.

### **Required Education and Experience:**

- Bachelor's Degree in Pastoral/Youth Ministry, Education, Theology, Psychology, Religious Education, Social Work or the equivalent. Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX.
- Training in current Catholic Theology, Christology and Ecclesiology.

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- Normally, a minimum of four years of experience in parish based ministry is required. Experience must include leadership roles. Experience in formation and religious education programs at all levels preferred.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of parish programs.
- Demonstrated communication skills, including public speaking, teaching, and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish educational programs.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Must have volunteer management skills: recruiting, training and supporting.
- Ability to delegate tasks where appropriate.
- Familiarity with the psychology of child learners and effective teaching methods for various age groups.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.

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- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The Pastoral Associate for Religious Education has the following duties and responsibilities:

- Oversees the education and spiritual development of the parish community by providing programs for the faith development of child population.
- Develops new educational programs where appropriate.
- Recruits participants for religious education (or faith formation) programs where appropriate.
- Supervises the recruitment and work of volunteer teachers, catechists, pastoral ministers and other lay leaders involved in education ministry, and provides for continuing formation for such ministers.
- Evaluates and provides guidance to catechists and teachers in religious education programs.
- Develops effective methods of encouraging enthusiasm, interest, participation, and learning suitable to the particular age of the students involved.
- Develops resources and is familiar with tools useful in education ministry including audio visual and computer based resources.
- Develops and evaluates curriculum content including tests, supplemental materials, resources and available materials to meet the needs of the religious education (or faith formation) program, consistent with the direction of the parish religious education board, and Diocesan guidelines.
- Works with parish schools and personnel to assist in the delivery of Catholic school religious education, where needed.
- Serves as teacher for sacramental preparation and other educational programs of the parish, including preparation for First Communion and First Reconciliation, and

## ***Roman Catholic Diocese of Boise***

coordinates parent meetings and educational opportunities for such sacramental preparation.

- Coordinates and directs retreats, social activities, outreach programs, liturgies and community service opportunities for those involved in education programs.
- Attends parish council meetings as an ex officio member where appropriate and as directed by pastor/parish life director.
- Develops communication programs and methods for informing parents about religious education programs.
- Maintains student registrations, permanent records and teacher records for religious education (or faith formation) programs.
- Keeps the parish faith community informed of the religious education or faith formation ministry.(i.e. programs, activities, goals and experiences)
- Maintains the resources library.
- Works with other parish ministers to prepare liturgies for religious education (or faith formation) programs.
- Works with the religious education program board (where applicable) to develop policy and plan programs, including keeping the board informed about religious education programs, and serving as an ex officio member of the board.
- Assures that the budget for education ministry is prepared and submitted to the pastor/parish life director in a timely fashion.
- Attends outside retreats, workshops and diocesan programs to obtain information and resources to further the goals of the religious education (or faith formation) programs.
- Works on personal formation, including any necessary certifications and continuing education in the areas of religious education.
- Perform additional religious education (or faith formation) duties as assigned by pastor/parish life director.

## *Roman Catholic Diocese of Boise*

# Sample

### **DIOCESE OF BOISE JOB DESCRIPTION**

<b>POSITION:</b>	<b>Parish Coordinator of Youth Ministry</b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Pastor; Parish Staff; Existing Youth Ministry Commission
<b>STATUS:</b>	Full time, <sup>4</sup> Exempt

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**Vision:** Rooted in the life of Jesus Christ and his call to discipleship, the coordinator of youth ministry provides vision and coordination for the parish's efforts in ministry to young people. The CYM implements and promotes the philosophy, goals, principles, and components of "Renewing the Vision: A Framework for Catholic Youth Ministry" at the parish level.

**Definition:** The Coordinator Youth Ministry is a professional lay ecclesial minister who is entrusted by the pastor or parish life director with the responsibility for developing a pastoral ministry with youth. In collaboration with the pastor, the Coordinator for Youth Ministry has the responsibility of overseeing ministries that address the total social, personal and spiritual formation of the parish's youth. The Coordinator identifies the call to formal and public ministry as a vocation rooted in baptism.

**Primary function:** The Coordinator of Youth Ministry provides day to day direction for the youth ministry functions of the parish. This includes responsibility for the development and supervision of faith formation of youth from junior high through high school. Responsibilities of this position include the eight elements of catechesis, evangelization, spirituality, liturgy and pastoral care for youth in the parish. The Coordinator is responsible for empowering a team of youth and adults to carry out this ministry for teens.

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<sup>4</sup> When parishes seek to hire a Coordinator on a less than full time basis, the job duties must be adjusted to fit the part time schedule. Parishes should consult with the Diocesan Office of Parish Life and Faith Formation (on all related job descriptions) to assure that core competencies are not eliminated in this process.

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### **Required Education and Experience:**

- Bachelor's Degree in Theology, Religious Education, or related field. Masters degree in Divinity, Theology, Pastoral Ministry or its equivalent preferred. Demonstrated compliance with national core competencies of National Association of Youth Ministry preferred. Other degrees and certificate programs or pastoral experience seriously considered, e.g., LIMEX.
- Training in current Catholic Theology, Christology and Ecclesiology.
- Training in the principles, practices and theory of total youth ministry with specialization in areas of sexuality, values clarification and decision making.
- Experience in youth ministry and faith formation is required. Normally, a minimum of four years of experience in parish based ministry is required. Experience must include leadership roles.

### **Required Knowledge, Skills and Abilities:**

- Demonstrated skill in administration of parish ministries.
- Demonstrated communication skills, including public speaking, teaching, and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of parish youth ministries.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to delegate tasks where appropriate.
- Familiarity with the psychology of teen learners and effective developmentally appropriate faith formation methods for various age groups.
- Must have management skills: recruiting, training and supporting volunteers
- Must have ability to relate with empathy, and build trust with teenagers in a group and on a one-to-one basis.

## ***Roman Catholic Diocese of Boise***

- Must have appropriate self-knowledge and ability to share the Catholic faith with young people.
- Bilingual skills as needed to minister effectively in parish.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church. Must continuously discern and respond to the call of the Holy Spirit to live as a disciple of Jesus Christ.
- Ability to identify personal gifts and challenges through self-reflection and spiritual companionship.
- Reflect a commitment to the Gospel through regular prayer, theological reflection, action on behalf of justice, and fulfillment of ministerial responsibilities.
- Discern and address the current realities in the church, and the world, in light of the Gospel.
- Give witness to an integrated spirituality formed by Scripture, theological reflection, prayer, and communal worship.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.
- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment. Relate respectfully with a diversity of persons, age groups, and cultures.
- Demonstrated commitment to personal life-long faith formation, continuing education, personal and professional growth.
- Personal commitment to ethical code of conduct such as that included in the National Certification Standards for Lay Ecclesial Ministers.

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### **Essential Duties and Responsibilities:**

The Coordinator of Youth Ministry has the following duties and responsibilities:

### **Professional Identity**

- The Coordinator promotes lay ecclesial ministry identity by developing ministerial goals that are integrated with Gospel values, maintaining a support system, setting responsible boundaries, accepting the ministry as a call from God, modeling the example of Jesus, and identifying with the universal church. See National Certification Standards for Lay Ecclesial Ministers.

### **Leadership in Faith Formation**

- Integrate knowledge of the Catholic faith into the youth ministry program, in accordance with the National Certification Standards for Lay Ecclesial Ministers.

### **Program Development**

- Demonstrate an understanding of and compliance with pastoral praxis standards outlined in the National Certification Standards for Lay Ecclesial Ministers.
- Oversees the faith formation of the parish community by providing ministries for the faith development of teen populations, utilizing appropriate methods of adolescent faith formation, as described in the US Bishops document, "Renewing the Vision."
- Facilitates the development of community among youth, families, church and society.
- Develops new educational ministries where appropriate. Develops resources and is familiar with tools useful in education ministry including audio visual and computer based resources.
- Develops and evaluates curriculum content including materials, resources and available materials to meet the needs of the program Diocesan guidelines.
- Works with parish schools and personnel to assist in the formation of teens attending Catholic school, where needed.
- Coordinates sacramental preparation and other faith formation ministries of this age group, including preparation for Confirmation, as well as coordinate parent meetings and educational opportunities for such sacramental preparation.
- Coordinates and directs retreats, social activities, outreach ministries, liturgies and community service opportunities for those involved in youth ministries.

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- Maintains student registrations, permanent records and youth minister records for youth ministries.
- Initiates procedures for evaluating all aspects of the parish's ministry to youth.

### **Program Leadership**

- Facilitate the Youth Leadership Team, which is responsible for planning, implementing, and evaluating a comprehensive youth ministry program.
- Supervises the work of team members, pastoral ministers and other lay leaders involved in the ministry, and provides continuing formation for such ministers.
- Evaluates and provides guidance to youth ministry leaders: publicity, liturgy, justice and service,
- Develops effective methods of encouraging enthusiasm, interest, participation, and learning suitable to the particular developmental age of the students involved.
- Works with team to develop goals and programmatic ideas for meeting the needs of the youth.
- Submits periodic reports to the pastor and/or staff reviewing youth ministry.
- Attend parish council meetings as an ex officio member where appropriate and as directed by pastor/parish life director.
- Develops communication plans and methods for informing parents about youth ministries.
- Keeps the parish faith community informed of the youth ministries.(i.e. events, activities, goals and experiences)
- Maintains a resources library.
- Prepares for special youth liturgies as needed.
- Works with the religious education board (where applicable) to develop policy and plan ministries, including keeping the board informed about youth ministries, and serving as an ex officio member of the board.
- Assures that the budget for youth ministry is prepared and submitted to the pastor/parish life director in a timely fashion.

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- Attends outside retreats, workshops and diocesan events to obtain information and resources to further the goals of the youth ministries.
- Works on personal formation, including any necessary certifications and continuing education in the areas of youth ministry. Keeps informed through attendance at diocesan, regional, and national conferences, regular reading, and membership in professional associations.
- Sets annual goals for youth ministry.
- Is aware of community agencies and resources that serve the youth.
- Perform youth ministry duties as assigned by pastor/parish life director.

## *Roman Catholic Diocese of Boise*

# Sample

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### **Job Description**

<b>POSITION:</b>	<b>Director of Music</b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Other Parish and Diocesan Ministers
<b>STATUS:</b>	Exempt, Part Time

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**Vision:** This ministry provides life and fullness to liturgical celebrations in the parish by providing spiritual inspiration through music.

**Primary function:** The Music Director works closely with the pastor/parish life director and the liturgy committee of the parish to plan and organize appropriate music for all parish events and celebrations.

### **Required Education and Experience:**

- Bachelor's degree in Music. Masters degree preferred.
- Experience in music ministry in the parish setting preferred.

### **Required Knowledge, Skills and Abilities:**

- Excellent knowledge of music theory and practice.
- High degree of proficiency in use of the organ, piano, and a working knowledge of other instruments used in parish music ministry.
- Knowledge and appreciation of liturgical arts and practices.
- Ability to direct choirs and congregational signing.

### **Personal Characteristics:**

- Enthusiasm for music as a part of liturgy.
- Willingness to improve knowledge and skills through course work and professional associations.

## *Roman Catholic Diocese of Boise*

### **Essential Duties and Responsibilities:**

- With the guidance of the liturgy committee (where applicable), participate in the planning and preparation of liturgical celebrations, (Sunday Eucharist, funerals, weddings, etc.)
- Select music for all liturgies and prepare the musical accompaniment and visual aids.
- Schedule musical groups and cantors for community liturgies.
- Obtain, prepare and maintain music for liturgies.
- Accompany funeral liturgies, or schedule musicians for such liturgies.
- Organize parish music groups and musicians and schedule rehearsals in order to provide direction and training.
- Hold regular rehearsals for and direct the music groups of the particular parish including (where applicable) Contemporary Choirs; Sanctuary Choirs and Youth Choirs.
- Select and train all choir members and cantors.
- Work with liturgists on wedding liturgy issues.
- Maintain professional competence through regular music practice.
- Establish and maintain contact with resources both within as well as outside the parish musical and liturgical community to facilitate the growth of new ideas.
- Attend staff and liturgy committee meetings (where applicable).
- Prepare annual budget for area of responsibility and administers the expenditures of approved items.
- Perform other duties and assumes other responsibilities as mutually agreed upon with pastor/parish life director.

## *Roman Catholic Diocese of Boise*

# *Sample*

## **Diocese of Boise Job Description**

<b>POSITION:</b>	<b>Parish Bookkeeper</b>
<b>APPOINTED BY:</b>	Pastor, Administrator or Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor, Administrator or Parish Life Director
<b>COLLABORATES WITH:</b>	Other parish staff and Diocesan staff as necessary
<b>STATUS:</b>	Nonexempt

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**Vision:** The Parish Bookkeeper provides key bookkeeping and recordkeeping support for the financial aspects of the parish, and thus assists in furthering the ministry of the Church in Idaho in the parish setting.

**Definition:** This position provides key financial recordkeeping support to the pastor, administrator or parish life director (hereafter referred to as “pastor”).

**Primary function:** The primary function of this position is to serve as a skilled resource and aide to the parish office by providing necessary financial recordkeeping and management services to the pastor and to those who seek assistance from the office.

### **Required Education and Experience:**

- High school diploma
- Additional education including post-secondary education in using personal computers to track financial information desirable
- Three to five years successful experience in bookkeeping positions, in a bilingual environment if appropriate to the particular parish.
- Familiarity with parish life or pastoral issues preferred.

### **Required Knowledge, Skills and Abilities:**

- Knowledge of bookkeeping practices.
- Knowledge of PowerChurch accounting program desirable
- Demonstrated skill in communicating
- Demonstrated skill in using computers to track financial information
- Demonstrated organizational skill
- Ability to meet deadlines

## ***Roman Catholic Diocese of Boise***

- Ability to maintain confidentiality of financial information
- Ability to collaborate with multiple people within and outside the parish office

### **Personal Characteristics:**

- Good interpersonal skills.
- Understanding of the Catholic Church and its teachings.
- Awareness and understanding of pastoral work.

### **Essential Duties and Responsibilities:**

- Provide bookkeeping and payroll recordkeeping services to the parish.
- Prepare payroll and associated taxes reports.
- Provide computer input/output services for accounting and census information.
- Prepare bank deposits and record receipts.
- Prepare vouchers.
- Coordinate payment of outstanding invoices.
- Coordinate envelope and parish donation system.
- Reconcile parish books and accounts.
- Prepare financial statements and information as requested.
- Assist in other clerical functions as needed.
- Assist in any way directed by the pastor/parish life director in furthering the goals and mission of the parish.

## *Roman Catholic Diocese of Boise*

# *Sample*

## **Diocese of Boise Job Description**

<b>POSITION:</b>	<b>Parish Secretary/Administrative Assistant</b>
<b>APPOINTED BY:</b>	Pastor, Administrator or Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor, Administrator or Parish Life Director
<b>COLLABORATES WITH:</b>	Other parish staff and Diocesan staff as necessary
<b>STATUS:</b>	Nonexempt

---

**Vision:** The Parish Secretary/Administrative Assistant provides key clerical support in furthering the ministry of the Church in Idaho in the parish setting.

**Definition:** This position provides key clerical support to the pastor, administrator or parish life director (hereafter referred to as “pastor”).

**Primary Function:** The primary function of this position is to serve as a skilled resource and aide to the parish office by providing necessary services to the pastor and to those who seek assistance from the office.

### **Required Education and Experience:**

- High school diploma
- Additional education including post-secondary education in Secretarial Science, Computer Applications, or Business Technology desirable
- At least five years successful experience in secretarial or clerical positions, possibly in a bilingual environment if appropriate to the particular parish.
- Familiarity with parish life or pastoral issues.

### **Required Knowledge, Skills and Abilities:**

- Knowledge of business correspondence procedures
- Knowledge of appropriate clerical functions and procedures
- Knowledge of filing systems and methods.
- Demonstrated skill in communicating
- Demonstrated skill in typing and word processing
- Demonstrated organizational skill
- Excellent telephone communication skills

## ***Roman Catholic Diocese of Boise***

- Skill in operating various computer programs such as Microsoft Word, Outlook Express, Microsoft Excel, Access, PowerPoint desirable
- Ability to work with computerized database systems.
- Ability to accurately and quickly type various documents including correspondence, minutes, agendas, mailing labels, and related documents.
- Ability to establish and rearrange priorities for timely completion of assignments within the broader goals of the parish office.
- Ability to work well with co-workers, supervisors, and the general public.
- Ability to collaborate with multiple people within and outside the parish office
- If necessary, bilingual ability, and/or sensitive to a multicultural environment

### **Personal Characteristics:**

- Good interpersonal skills.
- Understanding of the Catholic Church and its teachings.
- Awareness and understanding of pastoral work.

### **Essential Duties and Responsibilities:**

- Open and organize the parish mail, routing to appropriate personnel.
- Properly mail outgoing mail.
- Regularly check for e-mail on the computer (if applicable), and notify appropriate parties.
- Prepare material for inclusion in the weekly bulletin.
- Accept and screen all calls for the pastor/parish life director, and other designated staff where appropriate.
- Place and return calls, as well as set up conference calls when necessary.
- Prepare correspondence for pastor/parish life director. Coordinate correspondence function of the office. Type letters and memos and distribute accordingly. Initiate letters/cards for the pastor/parish life director and/or parish council, i.e.: get well, sympathy, congratulatory, thank you, feast and/or jubilee cards. File and record all correspondence.
- Assist with congregational mailings and other communication materials initiated by the pastor.
- Monitor the appointment schedule of the pastor. Greet guests who arrive in the office area. Circulate copies of the appointment and scheduling calendar as directed.

## ***Roman Catholic Diocese of Boise***

- Transcribe dictation tapes as directed.
- Transcribe and type minutes and agendas for meetings. Provide secretarial assistance during meetings. Record and distribute minutes. Make appropriate contacts to notify members of meetings
- Maintain conference rooms and meeting areas with necessary supplies.
- Type other general documents as requested.
- Perform filing function for staff.
- Organize filing systems for office. Update files, records and directories for the parish.
- Assist with mailings for workshops, projects and events.
- Assist in compiling materials and information for office projects and meetings.
- Provide support for all other office programs as needed
- Make travel arrangements where necessary
- Assist in other clerical functions as needed.
- Assist in any way directed by the pastor/parish life director in furthering the goals and mission of the parish.

## *Roman Catholic Diocese of Boise*

# Sample

### **Diocese of Boise Job Description**

<b>POSITION:</b>	<b>Principal, Catholic Elementary and Middle School</b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director; School Board; Superintendent of Schools
<b>COLLABORATES WITH:</b>	Diocesan Personnel; Other School Principals; Parish Leadership
<b>STATUS:</b>	Full Time; Exempt

---

**Vision:** The Catholic School Principal serves to promote the operation of a Catholic school system which reflects the highest ideals of Catholic education.

**Definition:** The Principal provides spiritual leadership of the school community, preserving and promoting the school's mission as a Catholic school. The Principal also provides visionary and strategic leadership and personally promotes the success of all students and staff by participating in the development, articulation, and stewardship of a vision of learning that is shared and supported by the staff, students, parents, and parish as a whole. The Principal is also the instructional leader, promoting the academic success of all students, and the professional growth of all staff, by ensuring a unified vision and integration of the total school program. The Principal is the primary provider of management and organizational leadership, in collaboration with the pastor and the School Board, and the Principal acts to promote a safe, efficient, and effective learning environment, and manages the organization, operations, and resources for the success of all students and staff.

**Primary function:** The Principal is primarily responsible for the complete day to day operation of the Catholic school, including all approved functions and services.

#### **Required Education and Experience:**

- Masters Degree and in keeping with the certification standards of the Idaho Department of Education, possess, or be capable of obtaining, within the period of certificate reciprocity, an Administrator Certificate with a principal endorsement, issued by the Idaho Department of Education.

## ***Roman Catholic Diocese of Boise***

- Demonstrate successful experiences as a classroom teacher or school counselor/building administrator.
- Have previous school administration experience.

### **Required Knowledge, Skills and Abilities:**

- Knowledge of Catholic school philosophy.
- Knowledge of budgetary practices and procedures.
- Knowledge of long range planning techniques.
- Knowledge of curriculum issues.
- Strong leadership skill.
- Demonstrated exemplary skills in written and oral communication in both private and public settings.
- Ability to establish and maintain a good working relationship with faculty, staff and students.
- Ability to relate to, and work with, diverse groups with varying interests.
- Ability to work in a collaborative management model.
- Preferably bilingual in both English and Spanish and be aware of and sensitive to a multi-cultural environment.

### **Personal Characteristics:**

- In order to be an appropriate role model as a practicing Catholic, be a person of high moral standards with a reputation for integrity, vision and imagination, and a lifestyle in conformity with the philosophy and teachings of the Catholic Church.
- A strong believer in the doctrines and teachings of the Catholic Church and the ideals and traditions of Catholic education.
- Demonstrated flexibility, firmness and consistency in decision-making.

## *Roman Catholic Diocese of Boise*

### **Essential Duties and Responsibilities:**

#### ***Instructional***

- Assure that faculty is consulted regarding curriculum issues, and is implementing all decisions concerning use of curriculum.
- Encourage innovation in the implementation of curriculum and teaching methods.
- Oversee the following:
  - Development, implementation, evaluation, and refinement of curriculum and assessment based on research, teacher expertise, student and community needs, Catholic educational best practices, and state and national curriculum standards.
  - Promotion of effective and innovative research-based instructional strategies.
  - Promotion and implementation of a professional development plan that is focused on student learning and is consistent with the school vision and goals.
  - Use and promotion of technology to advance faith formation, student learning, professional development, and overall school success.

#### ***Spiritual***

- Model the life of a believing and practicing Catholic.
- Foster a Christian environment within the school setting.
- Provide opportunities for religious growth for faculty and staff.
- Oversee the implementation of liturgical and sacramental celebrations for students.
- Work with the campus ministry to ensure that students have opportunities for spiritual growth and community service experiences.
- Exercise vigilance in guaranteeing that the program of religious education sponsored by the school-instruction and ministry-reflects the approved teaching and practices of the Catholic Church.

#### ***Planning***

- In collaboration with the pastor/parish life director and as requested by the School Board, develop measurable short and long-term goals and objectives for appropriate areas of school life, including staffing, curriculum development, facilities.

## ***Roman Catholic Diocese of Boise***

- Communicate short and long-range goals and objectives, as well as the mission statement to the school community, most particularly within the faculty, staff and student body and parish community.
- In collaboration with the pastor/parish life director and School Board, is responsible to see that a clearly articulated educational strategic plan is implemented.

### ***Financial***

- In collaboration with the School Board, develop measurable short and long-term financial goals and objectives for appropriate areas of school life, including the recruitment, admission and retention of students, appropriate staffing, curriculum development, facilities, finances, and institutional development.
- Communicate short and long-range goals and objectives, as well as the mission statement to the school and parish community.
- In collaboration with the School Board, ensure that a clearly articulated strategic plan is developed, implemented, and constantly evaluated.
- Use varied sources of information, data collection, and data analysis strategies for the purpose of planning school improvement, increasing student achievement, and ensuring financial stability.
- Is responsible for the following:
  - Supervision of the office staff, tuition assessment and collection and recordkeeping.
  - Preparation of the annual school budget, with input from the pastor/parish life director and staff, in alignment with annual strategic goals and objectives.
  - Presentation of the annual school budget to the School Board for review and adoption.
  - Management of approved annual school budget throughout the school year and reporting on the budget status monthly to the School Board.
  - Creation of a vision for the physical plant that provides for growth and improvement in the school facility.
  - Preparation and execution of capital campaigns where needed and directed by the pastor/parish life director.

## ***Roman Catholic Diocese of Boise***

- Oversee the following:
  - All fundraising activities connected to the school.
  - All advertising and marketing efforts.
  - The functions of all alumni operations.
  - All school-initiated news releases and press relationships.
  - Serve as chief spokesperson for the school.
  - Foster and maintain positive community relations and involvement.

### ***Management and Leadership***

- Improve the quality of instruction through continuous supervision.
- Development of policies required for the proper operations of the school.
- Ensure the implementation of School Board-adopted policies in all areas.
- Keep the parish and school community informed about school issues.
- Provide a safe, effective learning facility.
- Provide for the implementation of appropriate record management that meets all confidentiality and documentation requirements.
- Oversee the preparation of a master schedule, staff assignment, and student scheduling.
- Use and actively promote problem-solving and conflict management skills and strategies that foster positive student and teacher performance.
- Coordinate all accreditation compliance for Idaho secondary schools, private schools, and Catholic secondary educational requirements.
- Facilitate the professional growth of staff by initiating, providing and participating in regular staff meetings, curriculum in-service days, educational and related conferences.
- Foster collaboration with the parish leadership, parish councils, and parish youth ministers, Diocesan ministries, and with all religious communities of the Diocese of Boise.

## ***Roman Catholic Diocese of Boise***

- In collaboration with the pastor/parish life director, and Diocesan Human Resources staff, oversee recruitment, selection, hire, supervision, evaluation, retention or termination of academic, secretarial, and counseling staff and volunteers in accordance with the policies of the Diocese of Boise.

## *Roman Catholic Diocese of Boise*

# Sample

### *Diocese of Boise* **Job Description**

<b>POSITION:</b>	<b>Coordinator of Hispanic Ministries</b>
<b>APPOINTED BY:</b>	Pastor/Parish Life Director
<b>RESPONSIBLE TO:</b>	Pastor/Parish Life Director
<b>COLLABORATES WITH:</b>	Parish Staff
<b>STATUS:</b>	Exempt, Full Time

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**Vision:** The Coordinator of Hispanic Ministry is a professional minister who serves as a voice in representing and responding to the people of God in their diversity. The Coordinator seeks to foster the vision of multicultural ministry, which is to strengthen the unity of the Body of Christ while honoring and celebrating the cultural diversity of the Church. The Coordinator promotes the vision that Hispanic diversity is a blessing to the entire Church, and integral to the Church's mission in Idaho. The Coordinator is called to bring Hispanics and all other Catholics within the parish to a deeper love of Jesus Christ, and of the Catholic faith.

**Definition:** The Coordinator provides inspiration, leadership and assistance to the Hispanic population of the parish, and those ministering to that population.

**Primary function:** The Coordinator coordinates all functions of Hispanic Ministry for the parish. The Coordinator conducts all activities of this ministry, assures adequate funding, develops programs and responds to issues as they develop.

### **Required and Preferred Education and Experience:**

- Master's in religious education or theology (preferred)
- Certificate in Hispanic Ministries (preferred)
- Bilingual and bicultural Spanish/English
- Five years experience in Hispanic ministry at the parish level preferred
- At least three years of program development experience
- At least three years of supervisory experience
- Experience of the Idaho Church preferred

## *Roman Catholic Diocese of Boise*

### **Required Knowledge, Skills and Abilities:**

- Knowledge and understanding of Catholic Church doctrine including Vatican II, Hispanic National Encuentro, national and diocesan pastoral guidelines for Hispanic ministry, social teachings, and knowledge of the beliefs and practices of other religions.
- Knowledge of Hispanic cultures
- Excellent bilingual skills Spanish/English, in both written and oral communication.
- Expert translation skills Spanish/English
- Demonstrated skill in administration of an organization or program.
- Demonstrated communication skills, including public speaking and written communication.
- Demonstrated skill in budget administration and financial record-keeping and reporting.
- Demonstrated ability for long range planning and a vision for the future of the ministry and programs.
- Demonstrated ability to organize and prioritize.
- Ability to work in a collaborative team effort.
- Ability to lead and motivate others to action.
- Ability to delegate tasks where appropriate.

### **Personal Characteristics:**

- Must be an active participant in the work of the Catholic Church, a baptized and confirmed Catholic, and able to partake in the full sacramental life of the Church.
- Demonstrated ease in dealing with people, problems and crises; excellent interpersonal skills.
- Demonstrated emotional stability and self-confidence.
- Recognized as organized, hard-working, responsible and careful.
- Experiences with people must demonstrate cooperation, compassion and caring.

## ***Roman Catholic Diocese of Boise***

- Recognized as imaginative, open, curious, creative and intelligent.
- Aware of and sensitive to a multi-cultural environment.
- Demonstrated spirituality, prayer life, and religious conviction.
- Demonstrated commitment to ongoing formation, education, personal and professional growth.

### **Essential Duties and Responsibilities:**

The Coordinator of Hispanic Ministry is responsible for activities in the following areas:

#### **Program Development**

- Build community, encourage cultural pride, and facilitate the prophetic voice of the Hispanic community by: (1) promoting a deeper level of understanding of Hispanic community in the general community; and (2) establishing and supporting the growth of the Hispanic community.
- Encourage and support the development of small faith communities for Hispanic parishioners.
- Communicate with existing organizations and communities, including but not limited to Cursillos or Encuentros. Collaborate with such groups in developing programs, resources and projects that further the vision of the ministry.
- Develop formation opportunities for Hispanic youth.
- Develop faith formation and educational programs for Hispanic adults.
- Develop faith formation and educational programs for those working in Hispanic child and family catechesis.
- Implement diocesan guidelines for sacramental and liturgical ministers in the multicultural setting, including assisting with implementation of baptism, first communion, confirmation, and quinceaneras.
- Provide material and resources for sacramental preparation leaders.
- Answer questions concerning appropriate guidelines for sacramental preparation programs.

# *Roman Catholic Diocese of Boise*

## **Representation of the Multicultural Community**

- Advocate for the Hispanic community
- Promote representation of Hispanic parishioners on the parish pastoral council.

## **Communications**

- Use communication media to communicate with the Hispanic community, conduct outreach to those communities, and provide information and guidance to those communities.

## **Formation**

- Work within established guidelines for the development and formation of Hispanic lay leadership
- Encourage Christian vocations to the priesthood by working in cooperation with the Director of Vocations in promotion efforts within the Hispanic and ethnic communities.

## **Administrative**

- Administer the day to day operations of the Hispanic ministry and supervise any staff. Provide appropriate direction, evaluation and feedback to staff.

## **Financial**

- Administer the budget for Hispanic Ministry.

## **General**

- Assist with translation, or arrange for others to assist in oral or written translation where requested by parish staff.
- Perform additional duties as assigned.

***APPENDIX B***

***PERFORMANCE  
EVALUATIONS***

## *Roman Catholic Diocese of Boise*

### **PERFORMANCE EVALUATION PASTORAL ASSOCIATE**

Describe the employee's contributions and professional strengths or weaknesses in each of the six performance categories below. Illustrate specific, detailed examples of goals, results and job related behavior since the last review. Rate each category according to the scale, with 5 being the highest. **Ratings must support and be substantiated by narrative comments.** Continue comments on a separate sheet if needed.

<b>QUALITY OF WORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Demonstrates competence in required job skills and knowledge						
Attendance, punctuality, time management						
Accuracy, clarity, consistency and thoroughness of work						
Understanding and mastery of parish processes, methods, systems and procedures						
Makes good business decisions with needs of parish and parishioners in mind						
Exhibits good interpersonal skills						
Additional items:						

<b>Comments:</b>
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<b>PRODUCTIVITY</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Work is accomplished quickly and accurately						
Work assignments are planned, organized and analyzed for optimum results						
Implements appropriate cost-saving measures						
Exceeds parishioners' and supervisors' expectations						
Accomplished previously established goals and objectives						
Well organized and resourceful at accomplishing tasks						
Additional items:						

## *Roman Catholic Diocese of Boise*

**Comments:**

<b>TECHNICAL KNOWLEDGE</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Demonstrates proactive commitment to safety.						
Develops task alternatives and presents recommendations						
Demonstrates knowledge of Federal, State & Local Regulations as they apply to their duties						
Maintain personnel records						
Additional items:						

**Comments:**

<b>COMMUNICATION &amp; TEAMWORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Open to constructive criticism on how to improve						
Team player						
Pays attention to the needs of the parish						
Gets involved and goes beyond their assigned role						
Anticipates needs and does not wait to be told						
Effectiveness of oral expression in individual or group situation						
Uses ethical standards of behavior						
Fosters mutual respect and communication among staff members and volunteers.						

## *Roman Catholic Diocese of Boise*

Facilitates among the staff a needed spirit of cooperation instead of competition.							
Additional items:							

<b>Comments:</b>
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<b>LEADERSHIP &amp; PROJECT MANAGEMENT SKILLS</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Develops short-term goals for accomplishing tasks						
Assists staff in meeting their professional development goals						
Participates in long range plan development						
Assigns specific decision-making responsibilities						
Responds to concerns from parishioners and supervisor						
Delegates work appropriately						
Develops appropriate plans and policies						
Empowers the laity into service in the church.						
Appropriately supervises office, maintenance, and volunteer staff.						
Effectively manages parish property and space.						
Timely prepares the annual budget and appropriately manages the financial aspects of the parish.						
Additional items:						

*Roman Catholic Diocese of Boise*

**Comments:**

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Signature of Reviewer

Date

# *Roman Catholic Diocese of Boise*

## **Employee Self-Assessment**

**Performance Review Period:** \_\_\_\_\_

Employee Name \_\_\_\_\_ Date \_\_\_\_\_

Job Title \_\_\_\_\_ Office \_\_\_\_\_

Supervisor's Name \_\_\_\_\_

### **Employee Instructions:**

***Please complete and return this 3 page self evaluation to your supervisor by \_\_\_\_.***  
Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments since the last performance review \*.

\* If you have been employed by the company less than a year, substitute references to "since the last performance appraisal" with "since you were hired" and answer the questions accordingly.

1. List your most significant accomplishments or contributions since last year. How do these achievements align with the goals/objectives agreed upon with your supervisor?
2. Since the last appraisal period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If so, please specify.
3. What activities have you initiated, or actively participated in, in effort to encourage camaraderie and teamwork within your group and/or office? What was the result?
4. To which of the following factors would you attribute your professional development since last year: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, other - please describe.



# *Roman Catholic Diocese of Boise*

## **Parish Performance Review**

EMPLOYEE NAME \_\_\_\_\_

EMPLOYEE JOB TITLE \_\_\_\_\_

PASTOR/PLD'S SIGNATURE \_\_\_\_\_

EMPLOYEE'S SIGNATURE \_\_\_\_\_

### **DEFINITION OF RATINGS**

**EXCEPTIONAL (5):** Consistently meets and often exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in deanery and ministry groups.

**EXCEEDS EXPECTATIONS (4):** Consistently meets and sometimes exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

**MEETS EXPECTATIONS (3):** Meets all relevant performance standards. Seldom exceeds or falls short of desired results. Lacks appropriate level of skills or is inexperienced/still learning the scope of the job.

**BELOW EXPECTATIONS (2):** Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required, since the last performance review.

**NEEDS IMPROVEMENT (1):** Consistently falls short of performance standards.

### **OVERALL RATING FOR THIS EMPLOYEE:**

Exceptional	Exceeds Expectations	Meets Expectations	Below Expectations	Needs Improvement

## *Roman Catholic Diocese of Boise*

Describe the employee's contributions and professional strengths or weaknesses in each of the six performance categories below. Illustrate specific, detailed examples of goals, results and job related behavior since the last review. Rate each category according to the scale. **Ratings must support and be substantiated by narrative comments.** Continue comments on a separate sheet if needed.

### CRITERIA AND PERFORMANCE ELEMENTS

<b>QUALITY OF WORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>AVG</b>
Demonstrates competence in required job skills and knowledge							
Attendance, punctuality, time management							
Accuracy, clarity, consistency and thoroughness of work							
Gives feedback for continuous improvement of subordinate performance							
Understanding and mastery of parish work, including appropriate methods, systems and procedures							
Measures decisions with parish goals and vision in mind							
Exhibits good interpersonal skills							

#### Comments:

<b>PRODUCTIVITY</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>AVG</b>
Work is accomplished quickly and accurately							
Productivity standards are met							
Work assignments are planned, organized and analyzed for optimum results							
Implements appropriate cost-saving measures							
Exceeds pastor/PLD's expectations for work output							
Accomplished previously established goals and objectives							

#### Comments:

## *Roman Catholic Diocese of Boise*

<b>TECHNICAL KNOWLEDGE</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>AVG</b>
Developed system or procedure manual							
Set up procedures to ensure parish work flows efficiently							
Demonstrates proactive commitment to safety.							
Develops alternatives for decision making and presents recommendations							
Demonstrates knowledge of Federal, State & Local Regulations as they apply to their duties							

<b>Comments:</b>
------------------

<b>COMMUNICATION &amp; TEAMWORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>AVG</b>
Open to constructive critiques on how to improve							
Team player							
Pays attention to the needs of the parish							
Gets involved and goes beyond their assigned role							
Anticipates needs and does not wait to be told							
Effectiveness of expression in individual or group situation							

<b>Comments:</b>
------------------

## *Roman Catholic Diocese of Boise*

<b>LEADERSHIP &amp; PROJECT MANAGEMENT SKILLS</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>AVG</b>
Develops short-term goals and alternatives for accomplishing tasks							
Assists staff in meeting their professional development goals							
Participates in long range plan development							
Assigns specific decision-making responsibilities							
Responds to concerns from employees or co-workers							
Delegates work appropriately							

<b>Comments:</b>	
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<b>SIGNIFICANT ACHIEVEMENT:</b>	
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<b>ADDITIONAL COMMENTS:</b>	
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# *Roman Catholic Diocese of Boise*

## PERFORMANCE EVALUATION

Describe the employee's contributions and professional strengths or weaknesses in each of the performance categories below. Illustrate specific, detailed examples of goals, results and job related behavior since the last review. Rate each category according to the scale, with 5 being the highest. **Ratings must support and be substantiated by narrative comments.** Continue comments on separate sheet if needed.

<b>QUALITY OF WORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Demonstrates competence in required job skills and knowledge						
Attendance, punctuality, time management						
Accuracy, clarity, consistency and thoroughness of work						
Understanding and mastery of program processes, methods, systems and procedures						
Makes good decisions with needs of program in mind						
Exhibits good interpersonal skills						
Additional items:						

<p><b>Comments:</b></p>
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<b>PRODUCTIVITY</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Work is accomplished quickly and accurately						
Work assignments are planned, organized and analyzed for optimum results						
Implements appropriate cost-saving measures						
Exceeds supervisor's expectations						
Accomplished previously established goals and objectives						
Well organized and resourceful at accomplishing tasks						
Additional items:						

<p><b>Comments:</b></p>
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## *Roman Catholic Diocese of Boise*

<b>COMMUNICATION &amp; TEAMWORK</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Open to constructive criticism on how to improve						
Team player						
Pays attention to the needs of the program						
Gets involved and goes beyond their assigned role						
Anticipates needs and does not wait to be told						
Effectiveness of oral expression in individual or group situation						
Uses ethical standards of behavior						
Fosters mutual respect and communication among staff members and volunteers.						
Facilitates among the staff a needed spirit of cooperation instead of competition.						
Additional items:						

<b>Comments:</b>	
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\_\_\_\_\_  
Signature of Reviewer

\_\_\_\_\_  
Date

# ***APPENDIX C***

# ***FMLA FORMS***

# ***Roman Catholic Diocese of Boise***

## **Family & Medical Leave Request**

1. I have at least twelve months service with the Diocese of Boise. **YES NO**  
*Note: Service may be with more than one Agency – service need not be continuous.*
2. I have been paid for at least 1,250 hours of work by the Diocese of Boise **YES NO**  
In the past twelve months. (Does not include leave hours)

**Go forward only if all previous Questions have been answered YES and you have not used more than twelve weeks of Family Leave in the past twelve months.**

3. Reason for Family Leave:

*Note: Family Leave under the following circumstances must be completed no later than one year after the child's birth, adoption, or foster care placement.*

- I am the mother or father of a newborn child. The child's birth date or expected birth date is \_\_\_\_\_.
- I am adopting or have legally adopted a child. The date of child's placement in my home was/is \_\_\_\_\_.
- Placement of a foster child in my home. The date of child's placement in my home was/is \_\_\_\_\_.

*Note: In each case below, a serious health condition is defined as requiring one of the following: (1) inpatient care, (i.e. an overnight stay); (2) a period of incapacity of more than three consecutive calendar days, and treatment two or more times by a health care provider, or treatment by a health care provider on at least one occasion which results in a regiment of continuing treatment under the supervision of the health care provider; (3) incapacity due to pregnancy or prenatal condition (4) a chronic condition requiring periodic visits for treatment by a health care provider; or (5) a permanent/long-term condition requiring supervision. This does not include voluntary or cosmetic treatments unless inpatient hospital care is required.*

*Note: In each case below, a **Health Care Provider's Certification Form** must be completed and returned within 15 calendar days of submission of this Form.*

- Care for my seriously ill mother or father. *(If not your biological or adoptive parent, you must present satisfactory evidence of parental relationship – care for a mother-in-law or father-in-law does not qualify for Family Leave.)*
- Care for my seriously ill spouse. *(Must be legal spouse; unmarried domestic partners do not qualify for Family Leave.)*
- Care for my seriously ill child. *(If not your biological, adoptive, foster, or step-child, you must present documentation of parent-child relationship.)*
- Personal request due to my serious health condition or injury *(Would not include recovery from childbirth or extended pre-natal care).*

4. I understand that Family and Medical Leave is strictly unpaid leave that is used at the employee's discretion for qualifying events. Accrued paid leave may be used as part of the 12 weeks, under the conditions noted previously, at the employee's discretion.

## ***Roman Catholic Diocese of Boise***

5. I understand that in cases where Family and Medical Leave is foreseeable, I must apply, for Family and Medical Leave a minimum of 30 days in advance. In cases where Family and Medical Leave is not foreseeable, I understand it is my responsibility to apply for Family and Medical Leave as early as possible and practicable, either before or after the Family and Medical Leave event.

*Note: In all circumstances, employees are required to complete this Form.*

6. My first day of absence from work will be \_\_\_\_\_, and I will return to work on \_\_\_\_\_. If exact dates are unknown, please enter approximate dates.

*Note: Total absence may not exceed twelve weeks. In cases of childbirth, adoption, or foster child placement, the employer may require the leave to be taken in a single continuous period. In cases of serious health condition, leave may be taken intermittently for medical reasons, according to a schedule approved by the health care provider (attach leave schedule to the Health Care Provider's Certification Form).*

7. I understand that Family and Medical Leave is strictly unpaid leave. Requests for sick and vacation leave will be processed accordingly to applicable Personnel Rules. Use of sick leave and vacation leave will not be counted towards Family and Medical Leave, unless I elect to use it as part of the 12 weeks.
8. I understand that sick and vacation leave will not accrue and holidays will not be compensated during non-paid absences.
9. I understand that my service date will be adjusted if my unpaid absence exceeds fourteen consecutive calendar days.
10. I understand that if the absence from work was due to my personal health condition, I must submit a "Release for Duty" report from my Health Care Provider prior to my return to work.
11. I understand that when I return to work, I will be returned to the same job I left and that a failure to return to work at the end of my leave period may be treated as a resignation unless an extension has been agreed upon and approved in writing.

Employees Signature: \_\_\_\_\_

Date: \_\_\_\_\_

***Approved***

***Denied***

Agency Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Rev October 9, 2008

***APPENDIX D***

***POSTERS***