




Personnel Issues and the Role of Trustees



Trustees are officers of the
corporation.....
AND
support the
Pastor/Parish Director/ Administrator



Support Pastor/Administrator/Parish Director By

- Listening
- Offering objectivity
 - Look at situation from both employee and employer perspective
 - Asking good questions
 - Be aware of the importance of documentation
- Ensure following laws & what parish sets as policy, e.g., employee handbook
- Be willing to voice getting others involved, e.g., Arch



Areas That Trustees May Get Involved In from an HR Perspective

- Grievances
- Investigations
- Terminations



What is a Grievance

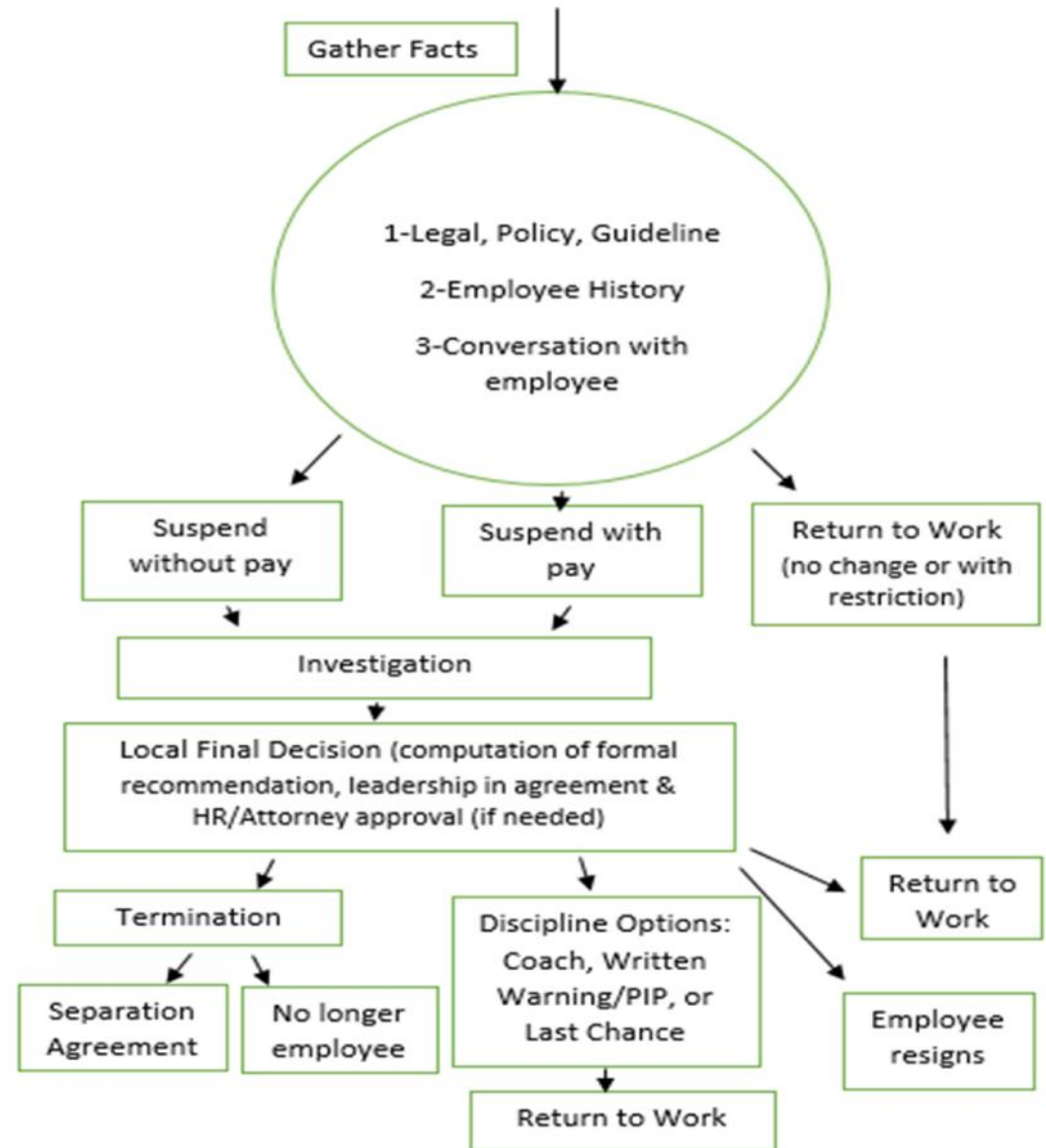
- Formal dissatisfaction of what an employee expects from the workplace.
- Examples:
 - Improperly or inequitable application of policy
 - Harassment
 - Retaliation
- May lead into an investigation



What is an Investigation

- Discover, uncover, & analyzing the reasons for a concern by gathering data then make recommendations to pastor for final decision
- Identify Investigators
 - Qualities: unbiased, objective, no stake in the outcome, interpersonal skills, confidential, ability to take accurate notes & attentive to detail.
 - Potential investigators - trustee, personnel committee member, finance committee member, or a pastoral committee member.

Employment Challenges: Typical Process for Resolution





Legal Considerations re: Terminations:

- An employer may say the termination was for nonperformance, but the employee can say it's really because of_____.
 - Gender,
 - Age,
 - Retaliation, etc.
- Documentation is key for a good defense.




HR Crisis Tool:

- Employer always has the ability to put employee on paid leave while facts are sorted out.



Legal Considerations:



Prior to taking an action that will result in a dismissal or termination (including a RIF and non-renewal of contract), **the employer must have sought and followed the advice of a qualified attorney OR other professional person that Catholic Mutual** has approved.



Questions?