



The Episcopal Diocese of Montana  
Employee Policy Handbook  
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General administrative policies are adopted by the Episcopal Diocese of Montana in conformity with the Constitution and Canons of the General Convention of the Protestant Episcopal Church of the United States of America and the Canons of the Episcopal Diocese of Montana as well as Federal and State law.

The Episcopal Diocese of Montana provides this Policy Handbook for its clergy (unless the Letter of Agreement has other requirements) and lay employees, as a basic guideline of benefits and services we provide for our staff, and as a guideline for standards of performance we expect in providing services to our clergy and congregations in the diocese.

This Handbook is not considered to be an employment contract.

The Episcopal Diocese of Montana reserves the right to modify these policies at any time and will notify employees if it does so.

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*This document applies to all diocesan employees (lay and clergy) unless a formal letter of agreement has stated specific benefits for that employee, in which case these policies still apply except for the specific amendments stated in the letter of agreement.*

*The provisions of this personnel policy handbook apply to Camp Marshall staff with the following exceptions because camp staff work less than six months per year: Insurance, pension, personal time off, sabbatical, continuing education, paid holidays, and short/long term disability.*

## **EMPLOYMENT PROCEDURES**

The Episcopal Diocese of Montana is an equal opportunity employer. It is our policy to comply with applicable Federal and State employment laws that require equal opportunity to all qualified persons without regard to race, color, national origin, age, physical or mental disability, marital status, religion, creed, sex, pregnancy, childbirth, or a medical condition related to pregnancy or childbirth, sexual orientation, gender identity or expression, political beliefs, genetic information, military service or veteran's status, culture, social origin or condition, or ancestry.

### **Application and Screening Processes:**

#### **Application Forms**

Uniform employment application form for applicants shall be prepared for use by such applicants.

#### **Applicants must complete and have on file:**

Application for Employment, including history of previous work experiences and not less than two references. also

- Background Check Form, and
- Voluntary Disclosure Form.

#### **The Interview**

Prior to hire, all permanent staff shall be interviewed by the bishop or her/his designee. An example might be the Executive Director, Summer Program Director or a designated Program Director for the summer programs at Camp Marshall. Seasonal staff will be interviewed by their supervisor.

Previous work experience and at least 2 references will be verified, and all forms filed in the individual's personnel file along with relevant certifications, written documentation of interview, and results of criminal background check.

Additional Periodic Screening after initial employment on an annual basis.

#### **Submit a completed voluntary disclosure form.**

Each staff member shall:

Undergo a check made with the National Sex Offender Public Registry, and criminal background check.

#### **Personnel Records**

The personnel officer or his designee shall maintain an individual file for each employee. containing confidential service records, position description and other pertinent documents.

A separate file may be maintained for medical records. Any staff member may examine his/her own personnel file on request within normal business hours and within the presence of the personnel officer.

**The file may include, but is not limited to;**

- Current Job Application
- Interview notes
- Voluntary Disclosure Form
- Completed Sex Offender Registry Check
- Completed Criminal Background Search
- Written record of at least two reference checks
- Verification of work & volunteer history on application
- Certificate of Completion for Prevention of Sexual Misconduct training
- Certificate of completion for Prevention of Sexual Harassment training
- Certificate of completion for Safeguarding God's Children training
- W-4 Income Tax Withholding Form,
- 1-9 Employee Eligibility Verification Form,
- Confirmation of Personnel Policy Review,

**EXEMPT AND NON-EXEMPT EMPLOYEES**

"Any employee employed in a bona fide executive, administrative or professional capacity" as defined by Department of Labor regulations is exempt. Clergy, Canon for Finance & Administration, Executive Camp Director and Camp Site Manager are considered exempt, which means they are not subject to the overtime requirements of state and federal law and are not entitled to be paid overtime.

The Diocesan Office Administrative Assistant is currently non-exempt, which means he/she is subject to the overtime requirements of state and federal law and for whom payment of overtime for hours worked in excess of forty in a workweek is required. Nonexempt employees must accurately record all time worked and shall be paid one and one-half times their regular rate of pay for all time worked in excess of forty hours in a workweek. Overtime work is scheduled by and must be approved by the non-exempt employee's supervisor before it is worked. There is no limit on the number of hours an employee aged 16 and older may work in any workweek.

Camp staff are exempt from the requirement of overtime payment under federal and state law due to the nature of their job.

**PROBATIONARY PERIOD**

Every newly hired employee will work a six-month probationary period. During a probationary period of employment, the employment may be terminated at the will of either the employer or the employee on notice to the other for any reason or for no reason. This probationary period may be extended for a period of not more than twelve (12) months, based on performance or for periods of absence, which would make it difficult to evaluate your work performance.

## **HOURS AND WORK WEEK**

Full-time employees work 40 hours per workweek. Part-time employees will work the number of hours agreed to in their employment agreement. For those who work fewer than 40 hours per work week, employee benefits are pro-rated accordingly, with the exception of payment for health, dental, and life insurance premiums. If non-exempt employees are scheduled to work fewer than 20 hours per week, they are no longer eligible for benefits.

It is expected that each employee will have two days off per workweek.

## **PAY PERIODS**

The Episcopal Diocese of Montana pays clergy and staff on the 1<sup>st</sup> and 15<sup>th</sup> of each month. The salary and housing are paid ahead of time (for current employees as of 11/5/2014). For instance, the check on the first of the month covers the 1<sup>st</sup>-14<sup>th</sup> of the current month and the check on the 15<sup>th</sup> covers the 15<sup>th</sup> through the end of the current month. If the pay day falls on a holiday or weekend, the payday will be the next business day. Typically, clergy are paid housing on the 1<sup>st</sup> and salary on the 15<sup>th</sup>. Lay staff are paid on the 1<sup>st</sup> and 15<sup>th</sup>.

Seasonal camp staff and employees hired after November 2014 will be paid for the actual hours worked during the pay period.

Non-exempt employees are required to use a form of mutually agreed upon timecards which must be signed by the supervisor.

## **PAID HOLIDAYS**

The Episcopal Diocese of Montana observes the following paid holidays:

- New Year's Day
- Martin Luther King Day (observed)
- President's Day (Observed)
- Good Friday
- Easter Monday
- Memorial Day (observed)
- Juneteenth
- Independence Day (observed)
- Labor Day (observed)
- Monday following Diocesan convention.
- Thanksgiving Day
- Friday after Thanksgiving Day
- Christmas Day

The Diocesan office reduces hours the week between Christmas and New Year's Day. Employees are paid in full for those days and are expected to check email, mail, and return phone calls during that time unless they are taking scheduled vacation time.

### **VACATION/SICK TIME (PERSONAL TIME OFF)**

Except as provided below, the Episcopal Diocese of Montana offers paid personal time off (PTO) to its regular, full-time employees according to the schedule below. Personal time off for part-time employees is accrued on a prorated basis. PTO will be reported to the Canon for Finance & Administration on a quarterly basis.

<b><u>Length of continuous service</u></b>	<b><u>Annual Rate of Accrual</u></b>
0 to 5 years	20 workdays/year
6 to 10 years	25 workdays/year
11 to 20 years	30 workdays/year
20 + years	35 workdays/year

Personal time off may be used for vacation, illness or injury of the employee or family member, medical or other personal appointments, or other personal time. Probationary employees do not accrue PTO during the probationary period. If the employee successfully completes the probationary period, the employee is awarded ten days of PTO and then begins accruing PTO at the rate described above. The maximum accrual of PTO for any employee is one and one-half times their annual rate of accrual. For example, an employee who accrues twenty workdays per year may accrue up to a maximum of thirty workdays total. Once the maximum accrual level is reached, the employee must use PTO before it will accrue again.

Each employee must take a minimum of five consecutive workdays of PTO each calendar year unless approval given by supervisor due to extenuating circumstances.

### **OVERTIME**

Due to the demands of our ministries, occasionally the employee may be asked to work extra hours.

Non-exempt employees will be paid overtime compensation at one and one-half times the employee's regular rate of pay for hours worked in excess of forty hours in a workweek. In accordance with Montana Code Annotated 39-3-405. Exclusions. "(1) (q) and employee of a seasonal nonprofit establishment that is an organized camp or religious or educational conference

center;" Camp Marshall seasonal employed staff are not eligible for overtime payment in excess of 40 hours in a workweek.

Exempt employees will take time off as they are able to do so, preferably within the next week of working the excess time. If time off is not taken within the next week, the employee will take time off as soon as he /she is able to do so.

### **JURY DUTY**

The Episcopal Diocese of Montana understands that occasionally employees are called to serve for jury duty in local, state, or federal courts.

Employees are expected to report to work before and after jury sessions, if reasonably practical, in order to give as much attention as possible to regular duties. Time allowed for jury duty will not be counted as time worked for computing overtime pay.

When an employee is called for jury duty, his/her regular compensation will be paid during the period of such duty. Any jury fees received by the employee should be remitted to the diocese, except for monies paid for expenses.

Regular part time employees will be granted jury leave hours calculated on a pro-rated basis commensurate with the number of hours worked per normal work week.

The Episcopal Diocese of Montana does not offer paid jury leave hours to temporary, seasonal, or contract employees.

### **CONTINUING EDUCATION**

Paid time off for continuing education is also available for regular full-time employees. Each employee is allowed up to ten days (eight-hour days) of paid continuing education time per year in addition to personal time off. Continuing education time does not accrue and is only paid if used for approved continuing education. Such continuing education must be approved in advance by the employee's supervisor.

### **SABBATICAL**

Employees who have been employed for seven years are eligible for a paid sabbatical for three months. Sabbatical time shall be used for spiritual enhancement and renewal and professional development in the Diocese of Montana. Because the purpose of the sabbatical is to nourish ministries in The Episcopal Diocese of Montana, employees are required to return to their employer for one year following a sabbatical to apply insights gained to diocesan ministries. Should an employee choose to leave their ministry within a year of taking a sabbatical, they will reimburse the employer 50% of the amount of the sabbatical pay.

Sabbatical time is not a vacation and is provided in addition to personal time off for employees who meet the above criteria. All sabbatical projects need the approval of the Ecclesiastical Authority. Unused sabbatical time is not paid out when an employee leaves employment. Employees must submit a written request and proposal for the sabbatical by June 1 for the following year unless there are no budgetary impacts on the sabbatical time (i.e., it is taken in



smaller increments and therefore hiring temporary help to fill in for the employee is not required) Requests for sabbatical must be submitted in writing to the Ecclesiastical Authority at least three months prior to taking the sabbatical (if no budgetary impact). The Ecclesiastical Authority has final approval of the content and timing of the sabbatical, and it must be approved by the Ecclesiastical Authority prior to taking the time.

### **FEES FOR SERVICES**

If a diocesan employee (clergy or lay staff) performs a service for a congregation and the congregation pays the employee or priest, the funds need to be given to the diocese or returned to the congregation.

Checks should be made to the diocese rather than to the employee. If checks are made to the employee, they are considered income (even if signed over to the diocese - where they would become a charitable contribution).

Employees may be reimbursed for reasonable expenses incurred as a result of performing duties for the diocese.

Employees may not accept gifts of greater than nominal value (\$25 or more).

### **INSURANCE**

Health insurance is offered to employees who work 20 hours or more per workweek (scheduled to work 1000 hours or more per year). The diocese pays the full premium for single or family coverage. The diocese also pays for dental, life and short- and long-term disability insurance. Insurance benefits are not offered to temporary, seasonal, or contract employees. Health Savings contributions are as follows:

Single plan - the total contribution is \$2,800 per year for those on the single plan and for those on the family plan it is \$5,450 per year total which covers the employee plus family and is the total contribution for the family plan. The \$2800 is not added to the amount for the family plan.

### **PENSION**

The Diocese of Montana offers pension plans through the Church Pension Group. Lay employees who are scheduled to work 1000 hours or more per year are eligible to participate and have a choice between a defined benefit plan and defined contribution plan. There is also an option of 403(b) withholding plans. Contact the Canon for Finance & Administration for more information and to enroll in the pension plans.

### **MILITARY LEAVE**

The Episcopal Diocese of Montana provides regular employees leaves of absence to fulfill military obligations in the U.S. Armed Forces. Such leaves will be granted in accordance with applicable state and federal laws.

Nonexempt employees who are members of National Guard or reserve units of the U.S. Armed Forces, and who are required to perform annual active-duty training, will be granted ten (10) working days leave per year for these obligations. Employees receiving less pay (base pay plus quarters and subsistence) than their normal diocesan rate of pay, while on annual training will be compensated by the diocese for the difference between their normal pay and their annual duty pay. Pay for part-time employees will be prorated based on the number of hours worked in a typical workweek.

For exempt employees, no deduction in pay may be made for temporary military leaves of up to three months, but the amount received by the exempt employee as military pay shall be offset against the amount of any pay due from the Diocese. Except as otherwise stated, all military leave for exempt employees and all military leave for non-exempt employees is without pay unless the employee chooses to use accumulated personal time off.

Employees returning from active-duty status with the Uniformed Services will be reinstated in accordance with the Uniformed Services Employment and Re-Employment Rights Act (USERRA).

Employees attending voluntary training schools are to apply to the Ecclesiastical Authority for permission to be absent from work. The Episcopal Diocese of Montana does not offer paid military leave to temporary part-time, seasonal or contract employees.

## **BEREAVEMENT LEAVE**

### **Definitions:**

- Immediate family: The spouse (or partner in the case of gay and lesbian staff), mother or father, sisters or brothers, and children, including step relationships.
- Extended family: Grandmothers and grandfathers, in-laws, aunts and uncles.

Five days paid bereavement leave is available for employees in the event of a death in the employee's immediate family. Three days paid bereavement leave is available for employees in the event of a death in the employee's extended family. If additional time off is necessary, it may be taken as personal time off; if no personal time off is available, additional time off will be unpaid.

In cases where the extended family was functioning as the employee's immediate family, the supervisor can grant a total of five days' paid leave on a case-by-case basis.

The bereaved employee shall notify the supervisor immediately of the death in the family and obtain verbal approval for the leave. This will be followed by written documentation by the supervisor. The employee then will record the leave as bereavement leave.

## **FAMILY LEAVE**

Any employee will be granted a family leave of absence for eight weeks due to the birth of a child or placement of a child for adoption. The duration of the leave of absence will depend on the needs of the Diocese and the employee. Prior to the employee's departure, the employee must signify their intent to return to work at the end of the leave. If they have so indicated, the employee will be reinstated to their original position or to an equivalent position with equivalent

pay and benefits, unless the Diocese's circumstances have so changed as to make it impossible or unreasonable to do so.

The family leave is used first, then the employee uses PTO leave. An extension may be granted by the ecclesiastical authority for up to four weeks beyond the eight weeks and employee's PTO. Employees may donate their PTO to other employees if they desire. Time beyond PTO and twelve weeks must have Diocesan Council's approval.

### **SHORT- AND LONG-TERM DISABILITY**

Employees who have an illness or injury that limits their duties and requires them to be out of the office for more than a month may be eligible for short-term and long-term disability benefits from the Church Pension Group.

### **IMMIGRATION COMPLIANCE**

The Episcopal Diocese of Montana is committed to employing only citizens of the United States and persons who are authorized to work in the United States in compliance with the Immigration Reform and Control Act of 1986.

As a condition of employment, each new employee must properly complete, sign and date the first section of the Immigration and Naturalization Form I-9 and provide the requisite supporting documents. Before commencing work, a newly rehired employee must also (1) resubmit the I-9 forms, and (2) make certain the completed forms have not been on file longer than three years or they will be considered invalid.

### **HARRASSMENT**

It is the policy of the Episcopal Diocese of Montana to prohibit harassment, disrespectful behavior of any kind, or intimidation of its employees by anyone, including managers, supervisors, co-workers, clergy, and parishioners, or the general public on the basis of sex, race, creed, color, national origin, religion, age, marital status, gender identity, sexual orientation or physical or mental disability. The Episcopal Diocese of Montana endeavors to provide a work environment free from unlawful harassment and/or intimidation. Mutual respect, consideration, and courtesy are expected of every employee of the Diocese of Montana. All employees will be subject to discipline, up to and including termination, for violation of this policy. Safe Church training is offered and must be completed every four years.

Sexual harassment is generally defined as unwelcome sexual advances, requests for favors, and other verbal, physical and/or visual contact of a sexual nature when:

1. Submission to such conduct is made either explicitly or implicitly a condition of an individual's employment.
2. Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or

3. Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

An employee who feels that he/she is a victim of harassment on the basis of sex, race, creed, color, national origin, religion, age, marital status, gender identity, sexual orientation, or physical or mental disability should report it immediately to the reporting hotline, 406-442-4175 or directly to the chancellor.

The diocesan response team will immediately conduct a thorough, objective, and complete investigation of the harassment, while protecting the confidentiality of the harassment complaint to the extent possible. The Diocese will make a determination about whether unlawful harassment occurred and will communicate this finding to the parties involved. The Diocese will then take prompt and effective remedial action if harassment has occurred in violation of this policy. The action must be commensurate with the severity of the offense and be made known to the victim. An employee who believes he or she is the victim of harassment or intimidation may also file a complaint with the Montana Human Rights Bureau and, in some cases, the Equal Employment Opportunity Commission. In order to meet the earliest applicable deadline for filing with a government agency, the complaint should be filed within 180 days from the date of the harassment occurrence. The filing deadline runs from the date of the unlawful harassment occurrence not from the date the complaint to the employer is resolved.

If you are not personally a victim of harassment, but observe actions against other employees, which you believe to be unlawful harassment, you are encouraged to bring them to the attention of your supervisor, the reporting hotline, or the chancellor. If you witness any harassment or abuse towards an individual under eighteen years of age, you are required to report the incident promptly to the police. Failure to do so may result in termination of employment.

The Diocese prohibits retaliation against any employee because he or she has made a report of alleged harassment, or against any employee, who has testified, assisted, or participated in any manner in an investigation or a report of alleged harassment.

Any manager, supervisor or clergy who becomes aware of possible harassment should promptly call the report hotline and advise the chancellor. Failure to do so may lead to disciplinary action.

### **OPEN DOOR POLICY**

The Episcopal Diocese of Montana encourages open communication between employees at all levels in order to share ideas, education and experiences.

In addition, we encourage employees to discuss any matter concerning the welfare of the employee or diocese. Quick resolution of issues is in the best interest of everyone.

Employees should discuss issues first with the person involved, and if there is no resolution, then the employee should discuss the matter with the employee's immediate supervisor. If the issue cannot be resolved, the employee is invited to discuss the issue with the Ecclesiastical Authority. This Open-Door policy applies to all matters relating to an employee's employment other than discipline or corrective action.

## **DRUG FREE WORKPLACE**

The Episcopal Diocese of Montana maintains a drug-free work environment and prohibits the unauthorized use, possession of, or distribution of illegal drugs or alcohol, or marijuana products while conducting diocesan business, representing the Diocese, or while on Diocesan property. Employees must report for work unimpaired from the effects of drugs or alcohol.

## **SMOKE FREE ENVIRONMENT**

The Episcopal Diocese of Montana's intent is to provide a safe and healthful work environment. The use of any tobacco or marijuana products (smoking or smokeless or vape products) is prohibited throughout our workplace, Diocesan property, and within any of our buildings. Smudging is allowed with prior approval of the Ecclesiastical Authority; it must be scheduled with the Ecclesiastical Authority.

## **PET POLICY**

The Diocesan Office is pet friendly. The species allowed will be dependent on the current employees' allergies and the suitability of the species in the building. Currently, pet snakes and pet spiders are prohibited. Pets, other than dogs, require prior approval of the Ecclesiastical Authority before entering the building. Service dogs are always welcome in the Diocesan Office. A separate pet policy for Camp Marshall is in place: see Camp Marshall's policies.

- Pets entering Diocesan Office must have proper veterinary care to promote health and prevent disease transmission to staff or other staff pets. All pets must be appropriately vaccinated. Rabies vaccination is required for all mammalian pets of vaccination age.
- Employees' pets must be under the direct supervision of the employee. Upon entering/exiting the building a leash or other restraint must be used. In general, pets are not allowed to wander the halls. Proper social training is expected.
- No pets may be left overnight, unsupervised in the Diocesan Office. Exceptions to this are for fish in maintained tanks or a Diocesan Office official cat. Any other exceptions must be approved by the Ecclesiastical Authority beforehand.
- The fenced-in side yard is available for dogs to exercise. They must be under direct supervision and any fecal material picked up promptly by the owner. When on cathedral grounds all pets must be properly restrained, and any fecal material picked up promptly. The cathedral may have separate rules for the presence of pets in its buildings.
- Any damage to physical property must be repaired at the pet owner's expense.
- Continued excessive damage may be grounds for exclusion.
- Any pets that cause excessive work distractions may be grounds for exclusion.
- Aggressive behavior will be grounds for exclusion.

## **ABSENTEEISM AND TARDINESS**

Tardiness and unexcused absenteeism cause serious problems for diocesan operations and are cause for discipline. If an employee is unable to report to work on time due to illness or other unexpected emergency, the employee is expected to:

- Notify his or her supervisor as soon as possible, the expectation is within two (2) hours) of the work shift.
- Keep their supervisor advised as to when the employee will be expected to

return to work. If an employee is unable to report due to an emergency, and is unable to make the call, the employee should have a member of his or her family call for the employee.

- Absence for two or more days without advising the employee's supervisor will be considered a voluntary resignation. Failure to report to work without notification is considered job abandonment and without a valid excuse may be reason for immediate termination.

## **EMPLOYEE BEHAVIOR**

As representatives of the Diocese, employees have an obligation to conform to its standards of conduct. Courteous and respectful behavior toward co-workers, supervisors, parishioners, and the general public and an appropriate attitude toward work are required. Employees are expected to work in the best interest of the Diocese and to keep the premises clean and free of trash. All employees are required to comply with the Diocese's policies, rules, and procedures, and to perform assigned job duties in a satisfactory manner and within specified guidelines.

- Employees are expected to respect the rights, property, and privacy of others. For example, they will not:
- Unlawfully discriminate based on race, color, religion, creed, sex, national origin, age, physical or mental disability, gender identity, sexual orientation, or marital status.
- Fight with or abuse others or behave in an offensive or inappropriate manner.
- Destroy, deface, damage, or wrongfully acquire property belonging to the Diocese, or other employees.
- Misuse or misappropriate assets or property of the Diocese, or other employees.
- Help anyone gain unauthorized entrance to Diocesan facilities or property.
- Disclose confidential information without authorization from the Diocese or appropriate legal/canonical authority.
- Violate any federal, state, or local law or ordinance, or any rules or regulations pertaining to their job responsibilities.
- Disregard safety or security procedures and regulations.
- Fail to immediately report damage to or an accident involving Diocesan equipment or personnel.
- Fail to maintain a neat and clean appearance; depart from accepted conventional modes of dress or personal grooming; or wear improper or unsafe clothing.
- Falsify employment or other Diocesan records.
- Commit any crime on Diocesan premises or involving Diocesan property.
- Violate Diocesan policies and procedures.

- Threaten Diocesan employees, parishioners, or the general public.
- Use profanity or behave rudely toward co-workers, clergy, parishioners, or the public.
- Communicate untrue statements or writings about the Diocese, its clergy or coworkers.

### **DISCIPLINE/DISCHARGE FOR GOOD CAUSE AND CORRECTIVE ACTION**

***This rest of this policy is applicable to lay employees only.*** Discipline and corrective action of clergy is governed by the Canons of the Episcopal Church but includes the inappropriate behavior below.

An employee may be discharged for "good cause" immediately or be subject to "disciplinary action" when they demonstrate behavior that intentionally or unintentionally violates Diocesan policy fails, to satisfactorily perform job duties, violates the law, or potentially may harm employees or the mission of the Church.

The Ecclesiastical Authority has the discretion to determine what actions or inactions constitute "good cause."

Examples of actions that may rise to disciplinary action for "good cause" include but are not limited to:

- Felony conviction
- Theft of any kind
- Falsification of Diocese information such as records, time sheets, etc.
- Being disrespectful to others to the point of causing fear and retaliation
- Harassment or intimidation of others
- Violent behavior
- Unauthorized possession of weapons or illegal substances on Diocesan property
- Working while under the influence of any substance that may cause the employee to place others in harm or jeopardy.

Exceptions to the above are probationary employees as a Probationary Employee may be discharged at will.

It is the policy of the Diocese that employees who fail to perform job duties in a satisfactory manner, whose conduct disrupts Diocesan operations, who fail to meet the expectations or the goals of a plan of improvement, or who violate Diocesan procedures, policies, rules, or performance standards are subject to discipline/corrective action, up to and including termination.



Discipline shall be commensurate with the seriousness of the offense. For example, the employee's immediate supervisor or their designee may use corrective counseling or an oral warning before more severe disciplinary action is taken for routine performance deficiencies and lesser offenses. More severe disciplinary action, up to and including termination, will be taken for more serious offenses and repeated lesser offenses.

## **CORRECTIVE DISCIPLINARY ACTIONS**

Each of the following disciplinary actions is independent of the other and will not necessarily be applied in the order listed. For example, depending on the severity of the offense, an employee may be terminated or suspended without having been warned or counseled, or may be terminated without having been placed on probation or suspended.

**Corrective Counseling.** Corrective counseling may be provided. Corrective counseling should consist of a straightforward discussion with the employee about matters deemed to be a problem with work performance or behavior. The employee must acknowledge receipt of a written warning with his/her signature and must be given a copy of the warning. Written warnings will be placed in the employee's personnel file.

Corrective counseling will be documented, and a copy of the documentation must be provided to the employee and placed in the employee's personnel file.

- **Verbal Warning.** A verbal warning may be given to an employee. The nature of the problem will be explained to and discussed with the employee. The verbal warning must be documented in writing and the employee must acknowledge receipt of the verbal warning with his/her signature and must be given a copy of the warning. The verbal warning will be placed in the employee's personnel file.
- **Written Warning.** A written warning may be given to an employee for job-related reasons. The warning must be in writing and must contain a description of the specific conduct for which the employee is being warned, how the problem is to be corrected, and the consequences if the problem is not corrected. The employee must acknowledge receipt of a written warning with his/her signature and must be given a copy of the warning. Written warnings will be placed in the employee's personnel file.
- **Suspension.** An employee may be suspended. A suspension may be with or without pay and may result in dismissal or reinstatement. The purpose of a suspension may be to provide an opportunity to conduct an investigation; when this is the case, the suspension will be with pay. A suspension must be in writing and contain a description of the specific conduct or reasons for which the employee is being suspended. A copy of the document placing the employee on suspension must be given to the employee. The employee must acknowledge receipt of the document with his/her signature. The document will then be placed in the employee's personnel file.
- **Termination.** If an employee is to be terminated, a notice of a termination must be in writing. A copy of the notice must be given to the employee. The employee must acknowledge receipt of the document with his/her signature, and it will be placed in the employee's personnel file.



At no time will corrective action or discipline be taken until a thorough investigation event(s) has been conducted. A copy of the investigation will not be provided to the employee being investigated; however, a general summary of the findings may be shared. A copy of the investigation is to be placed in the Diocesan Confidential Investigation file.

The Diocese of Montana will make every effort to enforce policies and procedures in a fair and equitable manner. It is important throughout the Corrective/Disciplinary process the employee be treated fairly and with dignity. Each step through the process must be documented and discussed personally with the employee. Counseling and Verbal Warnings will be maintained by the immediate supervisor. All documentation following the Verbal Warning will be maintained by the immediate supervisor and in the employee's personnel file at the Diocese. At the employee's request, all processes that have not advanced past the Verbal Warning will be removed from the supervisor's employees' file, provided there have been no additional occurrences within two (2) years following the last occurrence. A Written Warning may be removed from the employee's file after three (3) years, if no additional occurrences have occurred since the last occurrence. The employee must petition, in writing, their Supervisor for approval and then be approved by the Ecclesiastical Authority. Suspensions and above remain in their personnel file throughout the employee's employment.

### **COMPLAINT RESOLUTION/GRIEVANCE PROCEDURE (FOR LAY EMPLOYEES)**

This complaint resolution/grievance procedure is available to lay employees only. Discipline of clergy, including avenues of appeal, is governed by the Canons of the Episcopal Church.

All disciplinary action may be subject to grievance, with the exception of corrective counseling and verbal warnings.

Decisions to terminate a probationary employee or extend the probationary period, not to extend the term of a temporary employee, or not to renew the term of an employment contract are not grievable matters and are not subject to the complaint resolution/grievance procedure.

A copy of this grievance procedure will be provided to a terminated or terminating employee within seven days of the employee's departure. An employee who believes they have a grievance must first discuss the grievance with their supervisor. A grievance must be discussed with the employee's supervisor within five working days after the occurrence of the subject matter of the grievance, or it is deemed to have been waived by the aggrieved party. If the grievance involves a termination, the employee can skip this step and move to the next one.

If the employee wishes to pursue the grievance after the initial discussion with the supervisor, the employee must submit the grievance in writing to the Ecclesiastical Authority at the following address: PO Box 2020 Helena MT 59624, within ten workdays of the initial discussion with the supervisor (or, if the matter involves a termination, within ten workdays of the termination). The employee shall explain the nature of the problem, the specific reasons for the employee's dissatisfaction, and the employee's desired solution. In addition, the employee must submit a list of the names of the person(s) who have knowledge about the grievance and copies of any relevant documents. The Ecclesiastical Authority will respond in writing within twenty (20)

workdays after receipt of the written grievance. The Ecclesiastical Authority decision is the final step of the grievance process and binding.

### **PERFORMANCE ASSESSMENT**

The Episcopal Diocese of Montana evaluates all employees via written performance assessments. Each new employee will have an assessment of their duties and performance prior to the end of the probationary period. A performance assessment will be conducted semi-annually by the immediate supervisor. These appraisals are intended to provide individual support and feedback for the employee. Employee goals, job satisfaction, and career growth are all accomplishments to be attained by the employee.

### **TERMINATION**

Should a non-exempt employee resign from employment, at least two weeks' notice should be given, and the pay will be adjusted accordingly. Since wages are paid in advance, if an employee is terminated, he or she would have already received wages and there will be no further payment.

Exempt employees must provide at least thirty days (30) notice.

### **EMPLOYEE ACKNOWLEDGEMENT FORM**

The Episcopal Diocese of Montana Employee Policy Handbook describes important information about the Episcopal Diocese of Montana, and I understand that I should consult the Canon for Finance and Administration regarding questions not answered herein.

Since the information, policies, and benefits described here are subject to change, I acknowledge that revisions to the handbook may occur. All such changes will be communicated through official notices, and I understand that revised information may supersede, modify, or eliminate existing policies. Only the Ecclesiastical Authority has the authority to approve any revisions to this employee Policy Handbook within the framework of canon law and Montana employment laws.

I have received the Handbook, and I understand that it is my responsibility to read and comply with the policies contained in this handbook and any revisions made to it.

EMPLOYEE'S NAME

(printed): \_\_\_\_\_

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

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



### Employee handbook Annual Review

Date	Printed Name	Summary of Changes
5/6/2014	Staff review	Updated titles
		Added Marijuana to list of drugs
		Clarified continuing education time
		Updated note on camp staff
		Updated info on Christmas time off
10/3/2014	Staff & chancellor review	Clarification on comp time Clarification on not paying out comp time, personal time off, sabbatical time, continuing education when employees leave.
October-December 2014	Staff, chancellor, and attorney review	Additions by attorney, clarifications on personal time off, camp staff, comp time.
Spring 2015	Staff, chancellor and attorney review, bill before legislature regarding camp staff	Camp staff exemptions
December 2015	Final review by Amy Christiansen	
October 2016	Staff and chancellor	Remove Columbus Day holiday and add in information about health savings contributions.
May/June 2017	Staff and chancellor review	
March 2018	Staff and chancellor review	Increased continuing education hours, updates to employer contributions to health savings accounts and updates for changes in Camp Director
Spring 2021	Staff and HR Consultant review	Major revisions

## The Episcopal Diocese of Montana Camp Marshall

### Summer Staff Policies and Information

Our camp staff members are expected to be aware of and abide by the following personnel policies:

#### **1. Camper Welfare:**

The first responsibility of every staff member is the health and welfare of our campers. Each staff member is expected to respect the privacy and person of each camper. Physical punishment or any sexual contact between staff and campers is inappropriate and will be grounds for dismissal. Caution should be taken any time a staff member is alone with a camper or with a camper outside the view of other staff members. This is for the protection of the camper and staff member, as well as the camp.

#### **2. Facilities:**

All staff are responsible for the care of Camp Marshall's buildings and equipment. Camp vehicles are not available for personal use without prior approval of the staff member's immediate supervisor. Unauthorized use of camp gasoline, tools, equipment, or supplies is prohibited. Office phones are for camp business only.

#### **3. Compensation:**

- A. Paychecks will be distributed once every two weeks or once a month (depending on the payment plan a paid staff person chooses). Any exceptions must be cleared through the Camp Director.
- B. Employment periods begin and end per an individual's contract. All compensation is subject to applicable federal and state payroll withholding requirements.
- C. Room and board is provided during sessions of employment. Chaplains and their families will be provided housing at Camp Marshall, to be arranged with the Camp Director before the Chaplain's arrival.
- D. Workers' compensation insurance coverage is provided for all paid staff. It is the staff member's responsibility to appropriately report any injury immediately after it takes place.
- E. Volunteer Staff are responsible for their own accident/health insurance.
- F. Transportation to and from camp is the responsibility of all staff & volunteers unless, due to exceptional circumstances, other arrangements have

been made with the Camp Director (or designee) prior to the trip having been made.

**Time Off:**

- Program staff Will take time off after the close of each session, typically on Saturdays.
- Counseling Staff One 24-hour period per week (Saturdays) and either a 2-hr. morning or 2 hr. afternoon activity block each day.
- Volunteer staff will receive either a morning or afternoon activity block each day. If a volunteer is at camp for more than one week in a row, they will also have one 24-hour period off per-week.

Personal leave without pay may be granted, under extraordinary circumstances, with the approval of the Camp Director.

Sick Leave: A staff member may take sick leave only on the advice of the Camp Health Care Provider, and with the permission of the Camp Director. Sick leave is unpaid.

**4. Conditions of Employment/Placement of Paid and Volunteer Staff.**

A. The hiring and termination of staff is the responsibility of the Camp's Executive Director.

B. The employee/volunteer agrees that pursuant to the terms of their relationship with the

1. Episcopal Diocese of Montana, she/he will:
2. Conduct him/herself, both in camp and away from camp, so he/she will be a credit to him/herself and the camp.
3. Hours and habits: Keep hours and habits, which will enable him/her to serve the camp in a manner consistent with completing duties outlined in the job description. <sup>[SEP]</sup>Will attend and complete any required training satisfactorily.

C. There will be no consumption of alcohol or use of tobacco or vaping products while on the camp property. Personal possession of alcohol, except for sacramental wine, or being under the influence of alcohol is prohibited in camp at any time. Infractions of these policies will be considered grounds for immediate termination.

D. The use, possession, or being under the influence of any illegal, non-prescribed drugs during the time he/she is employed/or a volunteer for the Episcopal Diocese of Montana is cause for immediate termination. Staff that purchase alcohol or tobacco products for staff who are minors or for campers are subject to termination.

E. If you are not married and accordingly have not been provided a common living space with your spouse, there will be no sexual activity.

F. Firearms are not allowed on camp property, including in  
a. personal vehicle.

## **5. Termination**

A. Termination without cause - paid staff and volunteers may be terminated without cause if funds are lacking due to insufficient camper sign-up. If only one or two camps are cancelled due to insufficient sign-up the Camp Director reserves the right to grant time off and adjust salaries by pro-rating time off from the weekly salary (daily deduction).

B. Termination with cause – paid staff and volunteers may be terminated without cause in accordance with the Disciplinary Action policy (see #7).

C. Resignation – Staff members are expected to provide a minimum of ten days' notice of resignation. During the time between notice and departure, the employee will continue to perform his/her duties in a satisfactory manner.

D. Termination Pay – In the event of termination, the staff member will be compensated through the last day actually worked. The final paycheck for a terminated or terminating employee will be paid on the next payroll or within fifteen days of the employee's departure, whichever is sooner.

## **6. Tips or gratuities**

Staff members are not permitted to accept tips or gratuities from parents or campers.

## **7. Disciplinary Actions:**

It is the policy of Camp Marshall that employees who fail to perform job duties in a satisfactory manner, whose conduct disrupts camp operations, who fail to meet the expectations or the goals of a plan of improvement, or who violate camp procedures, policies, rules, or performance standards are subject to disciplinary action, up to and including termination. Each of the following disciplinary actions is independent of the other and may not be applied in the order listed. For example, depending on the severity of the offense, an employee may be terminated without having been suspended.

**A. Verbal Warning:** A verbal warning may be given to an employee for job-related reasons. The nature of the problem will be explained to and discussed with the employee. The verbal warning must be documented, and a copy of the documentation must be provided to the employee and placed in the employee's personnel file.

**B. Written warning:** A written warning may be given to an employee for job-related reasons. The warning must be in writing and must contain a description of the specific conduct for which the employee is being warned, how the problem is to be corrected, and the consequences if the problem is not corrected. The employee must acknowledge receipt of a written warning with his/her signature and must be given a copy of the warning. Written warnings will be placed in the employee's personnel file.

**C. Disciplinary Suspension:** A disciplinary suspension may be given to an employee for job-related reasons. A suspension may be with or without pay and may result in dismissal or reinstatement with or without back pay. The purpose of a suspension may be to provide an opportunity to conduct an investigation.

**D. Termination:** An employee may be terminated for job-related reasons. Notice of a termination must be in writing. A copy of the notice must be given to the employee and will be placed in the employee's personnel file.

## **8. Grievance Procedure:**

Should there be a disagreement over the interpretation of camp policies, or a grievance related to one's duties or disciplinary action, it should be reported to one's supervisor within five calendar days. If the supervisor does not resolve the issue to the employee's satisfaction or if the supervisor is the source of the grievance, the staff member may report the grievance to the Office of the Bishop at (406) 422-2230 within five days of the initial discussion of the supervisor or the occurrence of the event, as applicable. The Office of the Bishop will issue a written decision within five working days of receipt of the grievance. The Office of the Bishop's decision is the final step in the grievance procedure.

## **9. Harassment:**

Camp Marshall recognizes that a person's right to freedom from discrimination includes the opportunity to work and play in an environment free of harassment. Offensive speech and conduct that are discriminatory in nature are wholly inappropriate and intolerable to the relationships necessary for Camp Marshall's operations. Harassment includes all unwelcome advances, written or verbal innuendos, threats, insults, or disparaging remarks concerning a person's sex, national origin, race, creed, color, age, sexual orientation, marital status, veteran status, physical or mental disability, or religion. Examples of harassment include verbal harassment, (derogatory comments, demeaning jokes, threats), physical harassment (assault, impeding or blocking movement, unnecessary touching), and visual harassment (demeaning cards, cartoons, or gestures).



Sexual Harassment Policies are outlined here (<http://diomontana.com/wp-content/uploads/sites/38/2013/04/Policies-for-Safeguarding-Gods-People.pdf>) and will be provided to each staff member during staff training.

#### **10. Personal equipment:**

Personal equipment brought to camp by staff members remains the responsibility of the staff member, and the Episcopal Diocese of Montana is not liable for any damage incurred. We recommend that bicycles have locks and guitars have cases.

#### **11. Personal automobiles:**

Personal automobiles of staff or volunteers must be parked in the parking area. All personal vehicles remain the responsibility of the staff member, and the Episcopal Diocese of Montana is not responsible for any damage incurred. Staff under age 18 must have written parent permission to ride in other staff vehicles or allow others to ride in their vehicle. Staff/Volunteers are not to leave the property without the knowledge of the Camp Director or designee, unless it is their regularly scheduled day off.

- Anyone using a personal auto on camp business must provide proof of personal automobile liability insurance with minimum limits in accordance with Montana State Law to the main office.

#### **12. Camp Equipment:**

Staff may use Camp Equipment during time off in camp with permission of the Camp Director, but only when use of equipment will not interfere with the program of the camp. All safety policies must be followed (i.e., no kayaking after dusk).

#### **13. Photo Equipment:**

Cameras and any type of photo equipment are not to be used in changing areas.

#### **14. Personal visitors:**

Personal visitors should be kept to a minimum and preferably not during camp sessions. Any requests for visitors must be cleared through the Camp Director in advance.

#### **15. Appropriate dress shall be worn at all times.**

Staff may not wear clothing with words or graphics that could offend staff or parents. With the exception of time-off, personal audio players shall not be used. Men should wear shirts except when participating in watersports. Women must wear bathing suits that cover the torso. [SEP]

## **16. Performance Evaluations:**

A performance evaluation may be given to employees/volunteers following the close of camp. The Camp Director will meet with each staff member at the beginning and end of the term of employment, in order to set and evaluate progress toward the employee's goals. The Camp Director may meet with staff members during the camp season so that both can evaluate the employee's growth. Staff members need not wait for a scheduled supervisory conference to seek advice or counsel from one's supervisor.

## **17. Laundry**

– An on-site washer and dryer is available. Due to the limited number of machines, all volunteers staying for one week are requested to bring clothing for the duration of their stay.

## **18. Mail –**

Outgoing mail may be placed in the mailbox.

## **19. Internet**

Camp Marshall provides wireless internet for appropriate use. Camp computers are not for personal use. Because of limited bandwidth, we request that staff refrain from downloading videos and other high bandwidth activities.

## **20. Social Networking:**

Employees and volunteers must be respectful in all communications related to or referencing Camp Marshall, its campers, or staff. Staff and volunteers must refrain from posting photos of campers on the internet, except on approved camp websites. If you identify yourself as an employee of Camp Marshall on a social networking site, you must set your page to private. Staff should refrain from communicating with campers online, except through approved camp venues.

## **21. Parking lot**

The parking lot is out-of-bounds to all campers during the entire camp session unless otherwise authorized by the Camp Director, or her designee.

## **22. Purchases:**

Staff members may not purchase items for campers or give money or other gifts to campers. Food and drinks purchased outside of camp must be kept in the staff house and not consumed around campers.

## **23. Rest:**

Employed and volunteer staff are expected to maintain their focus on the needs of the campers throughout the day. In the evening, counselors are expected to stay with their cabin groups while program staff prepare for the following day.

## **24. Standards of Conduct:**

As representatives of the Camp Marshall, employees have an obligation to conform to its standards of conduct. Courteous and respectful behavior toward co-workers, supervisors, campers, and the general public and an appropriate attitude toward work are required. Employees are expected to work in the best interest of the Camp Marshall and to keep the premises clean and free of trash. All employees are required to perform assigned job duties in a satisfactory manner and within specified guidelines. Employees are expected to respect the rights, property, and privacy of others. For example, they will not:

- Fight with or abuse others or behave in an offensive or inappropriate manner.
- Destroy, deface, damage, or wrongfully acquire property belonging to Camp Marshall or to its employees,
- be regularly tardy, or cause campers to be tardy,
- misuse or misappropriate assets or property of the Diocese, or other employees.
- help anyone gain unauthorized entrance to Camp Marshall facilities or property.
- disclose confidential information without authorization from the appropriate legal authority.
- disregard safety or security procedures and regulations.
- fail to immediately report damage to or an accident involving Camp Marshall equipment or personnel,
- fail to maintain a neat appearance (note: men should wear shirts when they are not swimming, women should wear bathing suits that cover their midriff).
- falsify employment or other Diocesan records.
- use profanity or behave rudely toward co-workers, clergy, parishioners, or the public.
- communicate untrue statements or writings about Camp Marshall or its staff or campers.

**25. Weapons:**

Weapons of any kind are not permitted at Camp Marshall.

**26. Equal Employment:**

Camp Marshall prohibits unlawful discrimination in employment on the basis of race, color, national origin, veteran's status, age, physical or mental disability, marital status, creed, religion, or sex, except when the reasonable demands of the position require an age, physical or mental disability, marital status, creed, religion, or sex distinction. In the case of religion and creed, such distinctions may be appropriate under state and federal constitutional provisions due to the religious character and Episcopalian identity of Camp Marshall and the nature of the employment position at issue.

**27. Pets**

Pets of any kind are not allowed on camp property during term of employment, or on any visit to camp. This includes dogs on leashes. Any decision to make a change in this policy must be approved by the Camp Director.

## **ACKNOWLEDGMENT**

I acknowledge receipt of Camp Marshall's Personnel Policies and understand that this document supersedes all prior documents and any other verbal or written agreements, with the exception of my individual contract. In the case of conflict between these policies and my contract, the contract will govern. I have read and understand the camp policies.

I shall endeavor to understand and faithfully interpret the camp philosophy, objectives, and goals in my relationship with campers and all staff.

I shall conduct myself in an exemplary manner, recognizing that I am an adult role model for my campers. By my behavior, I will always try to demonstrate high moral values. I recognize that my conduct when I am away from the camp premises also reflects on the camp.

I shall always seek to be truthful, honest, and fair in my communication and interaction with campers and all staff including directors.

I accept the challenge of helping my campers increase their awareness of and responsibility to others and to the world of nature, helping them gain in self-confidence and self-concept, and of teaching them new skills.

I shall refrain from abusive language and any form of corporal punishment or embarrassment in my dealing with campers and other staff.

I shall be accepting of the diverse racial, national, ethnic, and cultural background of my campers, and not seek to impose my own particular views.

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Camp Director Signature \_\_\_\_\_ Date \_\_\_\_\_