

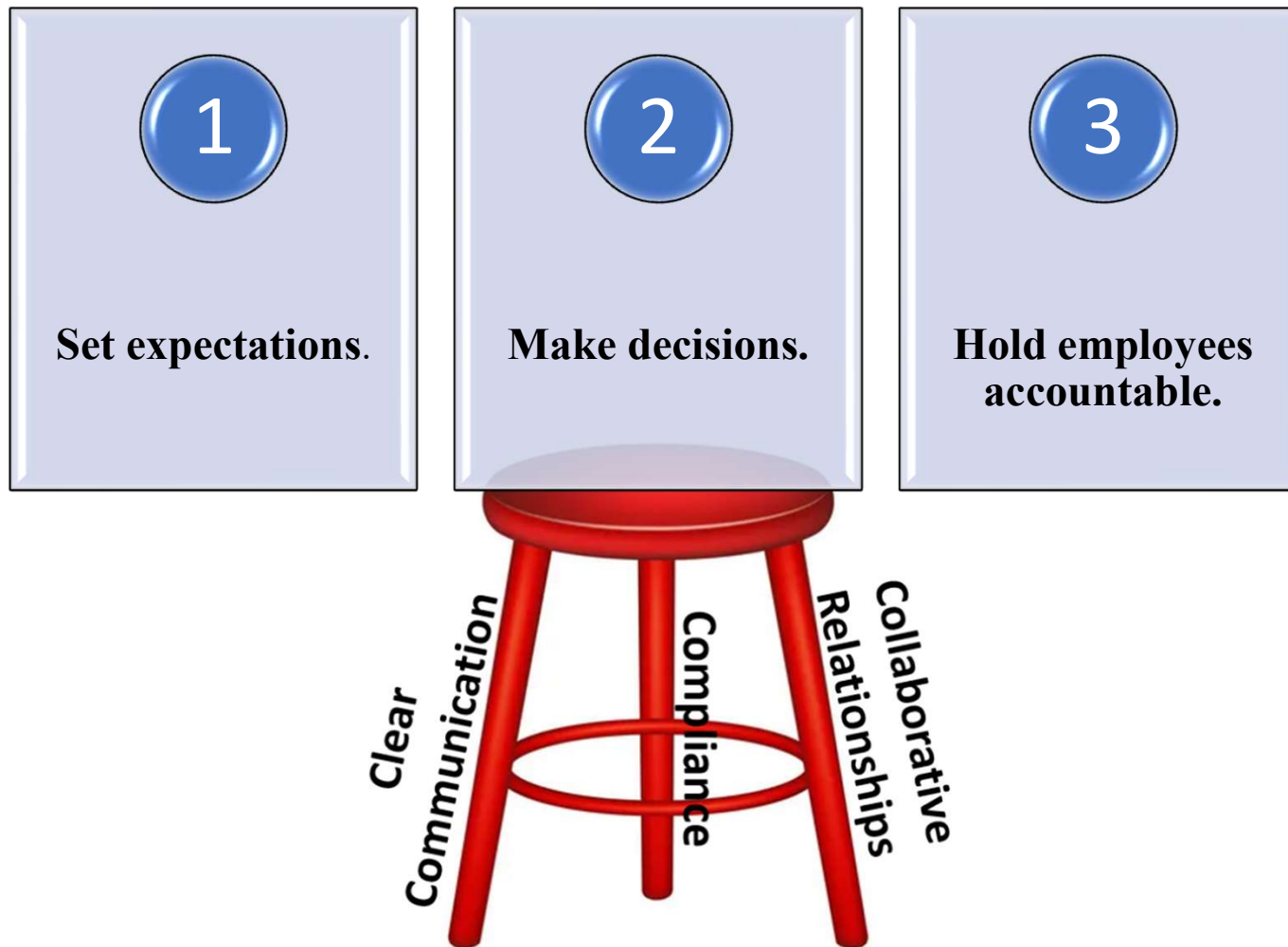


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*of* **MILWAUKEE**

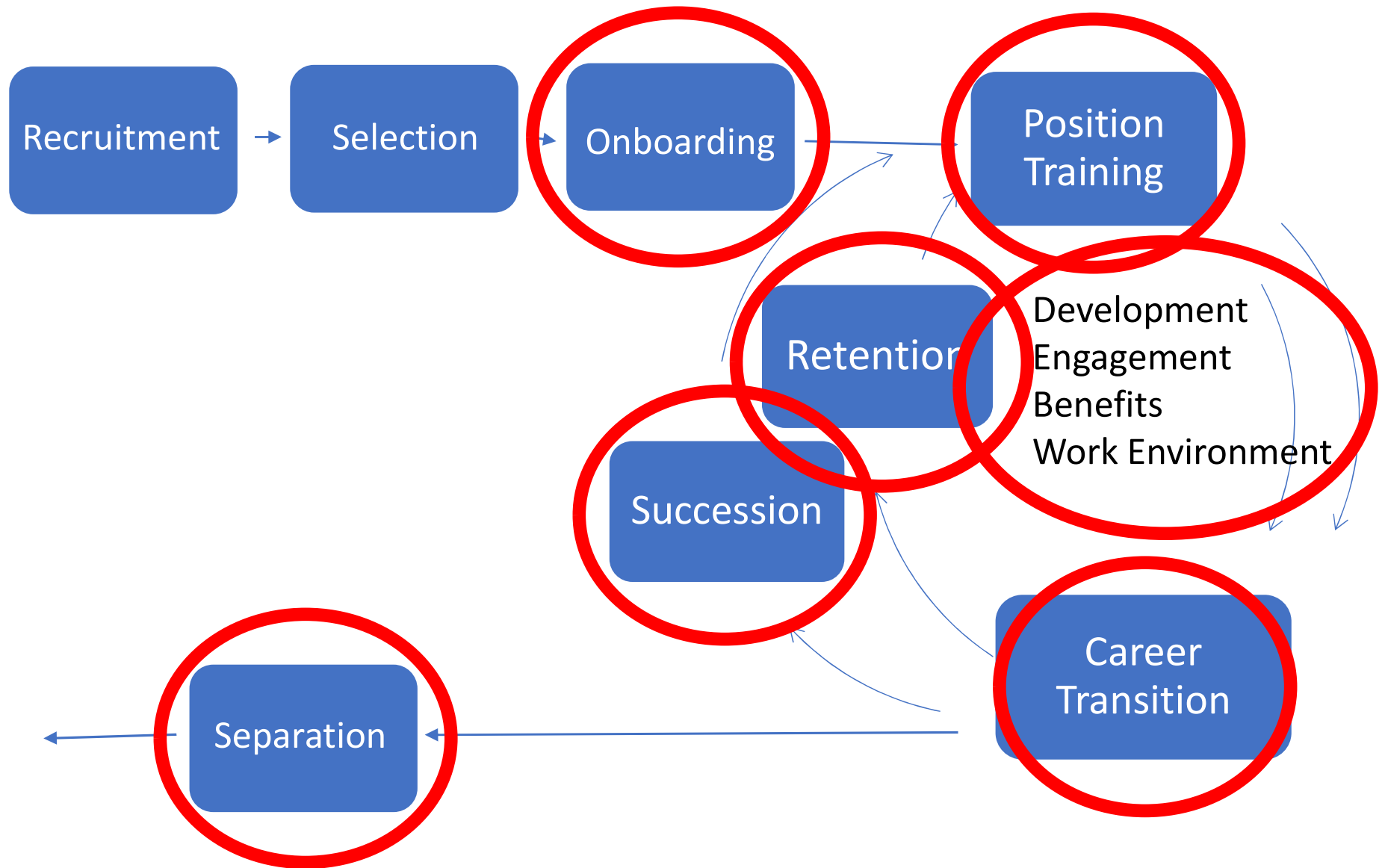
Parish and School Human Resources:  
Holding Employees Accountable

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## Leadership Framework



**Consistency is Key!**



## **Scenario:**

Your school has a long-time administrative assistant who works 30 hours during the school year. She is an active member of the parish and can be difficult to work with. She is slow to respond to your inquiries about her workload. Recently she started missing deadlines for work that the school needs her to complete.

**What would you do?**

**What are your next steps?**

# **I care enough about you to tell you the truth!**

**It is caring to give feedback. If you see someone doing something that is wrong, or if employees are not meeting your expectations, the thing to do is to speak up.**

# How to tell anyone anything (Be **CANDID**):

**C** ompartmentalize Your Message: The Neutral Zone

**A** sk Questions: From Furious to Curious

**N** ormalize: This conversation is okay, really

**D** iscuss the Issue: Just the Facts

**I** ncentivize: It's All About Them

**D** isengage from the Discussion: Making a Good Last  
Impression

# Example phrases for being pastoral and **CANDID:**

- **I overheard a comment you made about XXX. You sounded angry/frustrated and I'd like to talk about it.**
- **I don't think we're getting anywhere. Can we try a different approach and stick to the topic at hand?**
- **I want to make sure I understood what you said. I took the comment to be a negative remark about XXX. Is that what you meant?**
- **Can I think about it and get back to you later?**



## **Employee(s) must be treated fairly.**

- **Know expectations**
- **Dialogue on performance**
- **Evidence of poor performance**
- **Reasonable discipline**
- **The consequences must be clear**
- **Consistent and following policy**
- **Document**



**Depending upon the circumstances, discipline may be:**

- **verbal warning,**
- **written warning,**
- **Performance Improvement Plan (PIP)**
- **suspension with or without pay, OR**
- **termination.**

**Progressive discipline may not be followed in all cases.**

**CORRECTIVE ACTION**

Employee Name	Job Title	Date

**CORRECTIVE ACTION TAKEN:**

- Verbal Warning
- Written Warning
- Suspension Warning
- Termination/Final Warning

**REASON FOR CORRECTIVE ACTION:**

Note: Attach all supporting document (e.g., attendance reports; copies of substandard work, memos/relation notes, etc.)

- Absenteeism
- Tardiness
- Code of Ethics
- Substandard Job Performance
- Failure to Follow Established Policies/Procedures
- Other \_\_\_\_\_

**IDENTIFICATION OF PROBLEM AND CORRECTIVE ACTION REQUIRED:**

I have read this notice and understand further violation of the same or similar rules, policies or procedures, or continued performance issues may result in further corrective action up to and including discharge.

I, \_\_\_\_\_ ACKNOWLEDGE:

- A. I am not eligible to post for other positions during the corrective action period.
- B. My signature does not mean I agree with this action, only that I have been notified of the action taken and associated consequences.

Employee Signature/Date	Supervisor Signature/Date	HR Signature/Date

**EMPLOYEE COMMENTS:**

# Documentation Legal Considerations

- 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.**

## **What does Documentation need to include?**

- **Who**
- **What**
- **When**
- **Where**
- **Why**
- **How**

**Stick to the Facts!**

## Documentation example

**NO:** John Doe is usually late for work and misses too much work.

**BETTER:**

- 06/17/22: John Doe called in sick and missed 8 hours of work.
- 06/19/22: John Doe arrived to work at 10:00am, two hours later than his scheduled start time. John failed to call ahead to report that he would be late.
- 06/20/22: John Doe was 45 minutes late to work.
- 06/21/22: John Doe was 25 minutes late to work.
- 06/22/22: John Doe was 45 minutes late to work and missed the mandatory monthly safety meeting.

## **Documented Performance Improvement Plan (PIP) – Parish and School Policy Manual #4118**

- **List the performance concerns with examples (specifics are helpful, i.e.. Past conversations, outside complaints...)**
- **Define expectations**
- **Develop a plan of action to improve performance**
- **Schedule follow up meetings to monitor progress**
- **State the consequences if performance does not improve**

## The Performance Improvement Plan must have this language:

“The above goals and areas for improvement will be in effect for the \_\_\_\_\_ school year.”

“Failure to comply with these goals may lead to termination and/or the non-renewal for the \_\_\_\_\_ school year.”

Template for the PIP – Policy 4520  
Scan code for Parish and School Policy Manual



## **Reduction in Force (Policy 4532)**

- **Eliminate or reduce employment status due to employer not employee.**
- **Employment procedure with legal implications.**
- **Criteria for determining job reduction or job elimination.**
- **Employee(s) may have the right to recall.**
- **30-day notice prior to effective date.**



# TERMINATION MISCONCEPTIONS

**Any employee can be terminated at any time during the probationary period without warning.**

**An At-Will employee can be terminated at any time without warning.**

## Good to know....

- **Contract non-renew dates**
- **Grievance Process**
- **Church Unemployment Pay Program (CUPP)**

## **A Look Ahead at Non-Renewal of a Contract**

- **Date to inform non-renewal of contracts: April 1st for Principals; April 15th for Teachers**
- **According to policy, if non-renewal is due to a performance concern:**
  - **It should not come as a surprise**
  - **Concerns should be put into a written PIP**
  - **“Reasonable” coaching/ notice should be provided e.g. minimum of 60 days**

# Grievance

## What is a Grievance?

**Formal dissatisfaction of what an employee expects from the workplace.**

## Why?

**Improperly or inequitable application of policy; Harassment...**

**Process – Defined steps.**

**Written documentation.**

**Confidential, to the extent it is practical.**

# **Church Unemployment Pay Program (CUPP)**

**GOVERNED BY Wisconsin Catholic Conference (WCC)**

**Program has an Administrator contracted by WCC**

**Covered employee – at least 20 weeks of work with the employer during the prior 52 weeks.**

## Church Unemployment Pay Program (CUPP)

**More information on website regarding:**

- **Benefit Eligibility**
- **Disqualifications**
- **Benefit Determinations**
- **Claims Process**
- **Appeal Process**
- **Program Board Hearing**

**CUPPWI.ORG**

Scan code to visit CUPP site.

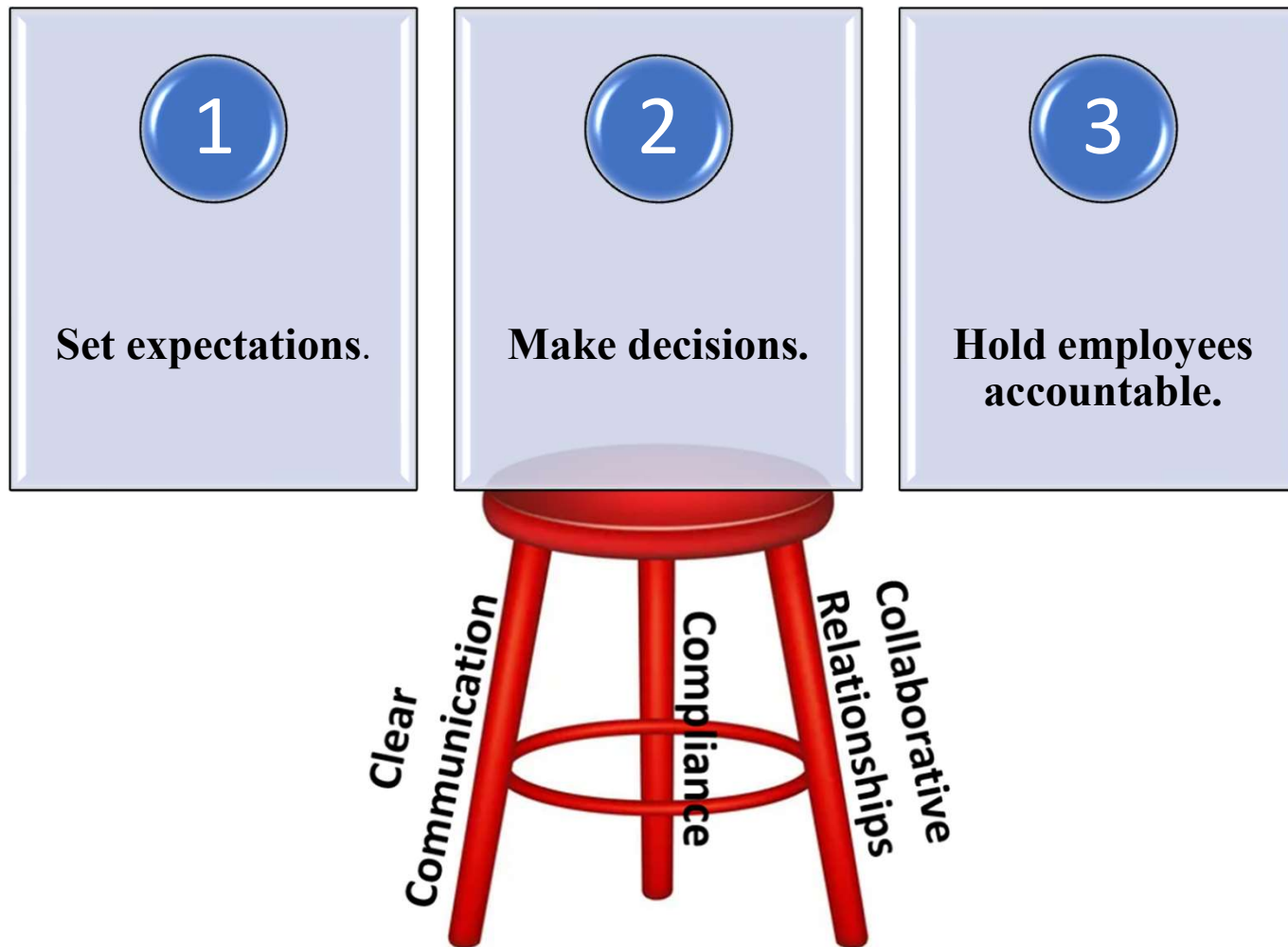


## A few HR reminders...

- Non-renewal dates:
  - April 1 for Principals (PIP January 31st)
  - April 15 for Teachers (PIP February 14<sup>th</sup>)

You notify the employee in writing by these dates of their non-renewal.

## Recap



**Consistency is Key!**



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.

**PASTOR SHOULD BE INVOLVED in all disciplinary actions!**

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