

DIOCESE  
OF EXETER

THE CHURCH  
OF ENGLAND  
IN DEVON



# CLERGY HANDBOOK

## TERMS & CONDITIONS OF SERVICE



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# Diocese of Exeter Clergy Handbook:

## Office Holders Terms and Conditions of Service

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# Welcome from the Bishop of Exeter

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Dear Colleagues

Welcome to this handbook and for those who are new to the diocese a very warm welcome to the Diocese of Exeter and this beautiful county of Devon. I was asked by a journalist recently to come up with three words to describe Devon – a tricky task – and in the end I settled on “cream, cows, coastlines” which leaves a great deal unsaid about the richness and diversity of life and ministry here! It is a blessing to be set in this County and diocese and I hope you find that to be the case too.

The vision for the diocese is ‘Pray, Grow, Serve’, aiming to deepen our connectedness and communion with God in Jesus Christ through the Holy Spirit in prayer and worship; to grow our Christian communities as we make new disciples and deepen our own faith and discipleship; and to serve the people of Devon with joy as we live out our faith in daily life.

Our vision is rooted in Jesus’ great commission to the disciples in Matthew 28.18-20:

*18 And Jesus came and said to them, “All authority in heaven and on earth has been given to me. 19 Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit 20 and teaching them to obey everything that I have commanded you. And lo, I am with you always, to the end of the age.”*

Significantly, Jesus announced this commission not to one disciple alone but to the group of disciples gathered together. So too, living out Jesus’ commission and the call to ‘Pray, Grow, Serve’ is not something any of us can do alone. We therefore expect, encourage and promote collaboration in ministry, with clergy and laity forging creative partnerships in our obedience to Christ and service in His name.

We recognise and take seriously that the demands of ministry are potentially endless and that there are real risks of being overwhelmed, isolated or burnt out if attention is not given to self-care and the guarding of ministerial wellbeing. As part of our response to these challenges, this handbook sets out clearly as possible the terms and conditions of service that are intended to enable you to be effective in ministry in ways that protect wellbeing and promote ministerial welfare.

The intention in this handbook is to gather into one place important policy statements, whilst also signposting you to more detailed guidance and information as and when it is needed. My thanks go to all those who have contributed to its preparation and I commend it to you as a valuable resource.

This handbook comes with my prayers for you in your ministerial calling and with a commitment from all the Bishop’s Staff Team to seek your flourishing as you lean into your calling.

Blessings



Bishop Mike Harrison

## Introduction

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This **Clergy Handbook** summarises the terms and conditions of your service as an office holder in the Diocese of Exeter. It amplifies the **Statement of Particulars** which, under the

Ecclesiastical Offices (Terms of Service) Regulations 2009, the majority of beneficed and licensed clergy, and some lay ministers, are entitled to receive. It forms part of the legal framework for ministry in the Church of England known as Common Tenure.

This Handbook should be read in conjunction with the latest **Bishop's Guidelines for Ordained Ministry: June 2020**<sup>1</sup>. The Guidelines distil good practice and endeavour to help clergy understand better their obligations and responsibilities as office holders. Some of the content is drawn from Canon Law and Measures and Acts of Parliament. The Guidelines may also be helpful to those clergy and laity who are not subject to the terms and conditions of Common Tenure as set out in this Handbook.

Taken together, these three documents constitute the legal framework for your service as an office holder in the diocese. They are set within the broader context of the national **Guidelines for the Professional Conduct of the Clergy**<sup>2</sup> and the **Five Guiding Principles**<sup>3</sup> commended by the House of Bishops, which all clergy are expected to adhere to and to work in ways that are consistent with it. Links to these resources can be found at the end of this section.

The terms and conditions of service summarised in this Handbook apply to all parochial office holders in the diocese unless stated otherwise. Exceptions may apply in some cases; for example, to clergy who are Self Supporting Ministers, who hold a freehold office, or whose appointment has been extended beyond the age of 70. Where there is an exception to a specific term or condition this will be indicated in the text.

Some clergy in the diocese do not hold a parochial office, but instead are employed by the Exeter Diocesan Board of Finance (EDBF) or operate in a chaplaincy or advisory capacity under another organisation. For clergy who are employed by EDBF, there is a separate **Employee Handbook** which sets out their terms and conditions of employment. This is a useful resource and reference guide for everyone who is employed to carry out duties on behalf of EDBF and provides information on employee working conditions, employment benefits and the policies affecting their employment.

As a significant number of clergy serve under a contract of employment with the EDBF, the terms and conditions set out in the current EDBF Employee Handbook are designed to give parity between office holders and EDBF employees, except where differences are unavoidable due to the legal requirements of Common Tenure.

Clergy employed as chaplains or advisers will have similar rights and responsibilities conferred within their employment contracts, which will provide for relevant matters including line management, appraisal, time off work, etc.

Clergy who exercise ordained ministry in pursuance of a contract of employment will usually hold the Bishop's general License under Seal. Such clergy are subject to the terms and conditions set out in their contract of employment rather than the provisions of Common Tenure. However, they are invited and encouraged to participate in Ministry Development Review (MDR) and Continuing Ministry Development (CMD) as appropriate to their circumstances.

Where clergy are employed by EDBF or another employer and, at the same time, hold the Bishop's License to a specific parochial office (for example, as an Associate Minister in a benefice), they are subject to the provisions of their contract in respect of their employment and to the provisions of Common Tenure in respect of their parish ministry.

All Church of England clergy, whether or not they hold the Bishop's authorisation to minister in any form, remain subject to the Clergy Discipline Measure.

In order to keep this Handbook to a manageable length, the terms and conditions have been summarised and are supported with signposts to where further information can be found online. This is particularly so for the sections relating to Performance and Capability (Section 13) and Grievances (Section 14). Striking a balance between providing a useful working summary of the policies whilst not losing the nuances of the full policies is a challenge; so we encourage all clergy to read the full guidance and protocols online.

We hope that this Handbook, along with your Statement of Particulars and the Bishop's Guidelines for Ordained Ministry, gives you sufficient information to help you approach your ministry with confidence. We hope that its guidance helps you in the decisions and choices you make during the course of your ministry.

If you have any questions regarding either the contents of the Handbook or what you have to do to comply with it, please contact in the first instance the Bishop's Chaplain. We will ensure you have access to the most up to date version of the Handbook and all related policies and procedures either on the Diocesan or national Church of England websites.

1. Diocese of Exeter Bishop's Guidelines 2020

[2. Guidelines for the Professional Conduct of Clergy 2015 booklet](#)

3. Church of England Website Information for the Professional Conduct of Clergy

4. The Five Guiding Principles- A Resource for Study.

## Section 1: Diocese of Exeter - Who We Are

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### 1.1 Vision and Strategy

*'I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope.'* Jeremiah 29.11

As a diocese we seek to be people who together are:

#### **Growing in Prayer**

We want to grow in prayer, living a life close to God. This means taking risks as we become more honest with ourselves and more honest with God. Prayer opens up deep places within us to God's grace, which is why it is such a life-giving activity. Growing in prayer is essential if we are to witness to God's Kingdom and become the people God has called us to be.

#### **Making New Disciples**

A disciple is someone who follows Jesus Christ. With him as our companion and guide we can travel through life differently, and we hope others will share the adventure with us. We want to be more faithful in our discipleship and allow God to shape our priorities and values. The Christian gospel is good news and we need to find new ways of telling the story, of explaining the faith and giving a reason for the hope that is in us.

#### **Serving the People of Devon with Joy**

We want to make a difference in the world and witness to God's love and justice, especially in the communities and schools where we live. Working in partnership with others who are transforming lives, we seek to address the global issues confronting our generation so that everyone may flourish.

### 1.2 Social Context

Devon is the third largest county in England and the Diocese of Exeter is virtually coterminous with the county boundary, covering 2575 square miles.

The diocese has a population of around 1,226,000. Nearly half live in three main urban areas; Plymouth in the South (280,000), Torbay in the East (140,000) and Exeter itself in the centre (135,000). Exmouth has a population of 36,000 and Barnstaple of 32,000. There are a few other towns with populations over 10,000 and a large number of small towns and villages, frequently divided from each other by steep hills and valleys.

Devon's population is 95.8% white (2021 Census) with other smaller communities mainly concentrated in the urban centres. It has a relatively ageing demographic (the average age is 51, compared to an English average of 40) with over a quarter of residents over 65, reflecting its popularity as a retirement destination. The area also has low religious diversity, with 'other' faiths, including Muslim (0.7%), Buddhist (0.4%), and Hindu (0.2%), making up a combined 1.3% percentage of the population. The population is relatively stable, increasing by 1.1% in 2025, mainly due to relocation of people moving to the county from elsewhere in the UK.

Devon's economy is one of the largest in South West England and ranks 19th among England's 46 counties. It has historically relied on traditional industries such as fishing, mining, and farming, many of which have declined,

Tourism is a major economic driver, rooted in the rise of seaside resorts since the 19th century. Though tourism declined nationwide in the mid-20th century, Devon has seen recent recovery supported by natural assets including Dartmoor and Exmoor National Parks and multiple UNESCO-designated landscapes, notably Torbay.

Agriculture remains highly significant in Devon, with the largest outputs in livestock—especially milk and beef. The region's total income from farming is over ten billion pounds annually, representing more than a quarter of the total GDP.

Devon also benefits from major employers and institutions, including the Met Office in Exeter, His Majesty's Naval Base Devonport in Plymouth, and various advanced manufacturing and environmental science sectors that support ongoing economic diversification. University education is also a thriving sector, with 50,000 students based in Exeter and Plymouth.

### 1.3 Ecclesiastical Setting

The diocese is divided into four Archdeaconries: Exeter, Barnstaple, Totnes and Plymouth. At present there are 22 deaneries (Exeter 7, Totnes 6, Barnstaple 6 and Plymouth 3) following the establishment of a new City Deanery in Plymouth to replace the three former deaneries in the city. There are two Suffragan sees: Crediton and Plymouth.



The Diocesan Bishop provides an overall coordination and focus of unity across the diocese; this role is currently held by Bishop Mike Harrison, who was appointed in 2024. The Suffragan Bishops of Crediton and Plymouth assist him in his oversight and share fully in the episcopal work including institutions, licensings and confirmations. Together, they are leaders in mission. An informal area scheme operates in which day to day episcopal care is delegated. In the case of the Bishop of Crediton, this comprises the Archdeaconries of Exeter and Barnstaple, and the Bishop of Plymouth, the Archdeaconries of Plymouth and Totnes. Both Suffragan Bishops have formal Instruments of Delegation. Along with the archdeacons, they oversee a major portfolio in the life of the diocese.

The diocese has 484 parishes (3rd highest) and 594 church buildings (5th highest). In 2024 there were 1,120 baptisms, 660 marriages and blessings and 2,940 recorded funerals. The October All-Age Average weekly attendance was 16,100 and the Christmas figure was 54,000.

As of 2025 there were 183 full-time equivalent stipendiary or part-stipendiary Bishops, Priests and Deacons with a further 47 Self-Supporting Ministers and 182 Readers. The diocese is grateful for the ministry of many active retired clergy in the county. We have formulated a deployment strategy in anticipation of the reduction in the number of stipendiary clergy through retirement, complemented by a strategy to grow vocations.

## 1.4 Missional Setting

Since 2006, the diocese has been organised into Mission Communities of which there are roughly 120. We aim to be mission-oriented, community-focused and locally rooted. As God's people we are called to live out our faith and continue the mission of God as revealed in the life, death and resurrection of Jesus Christ.

We recognise that not every parish can offer every aspect of the Church's life and ministry, but by joining in partnership with neighbouring churches and forming a Mission Community we can work together more effectively. This involves a commitment to:

- Regular prayer and worship.
- Pastoral care.
- Evangelism and mission, often in collaboration with ecumenical partners.
- Opportunities for learning, teaching, nurture and growth for disciples of all ages.
- Youth and children's work and worship.
- Equipping members for ministry and the development of ministry teams.
- Ensuring our churches are safe places for all.
- Connecting with the local community especially in service to the marginalised.
- Good administration and stewardship of time, resources and buildings.

Mission Communities vary from place to place, but usually involve 150 or more worshipping adults, together with children and young people, to form a critical mass. The commitment to work together may be formalised as a united benefice or Team Ministry, or be expressed through a looser partnership. Each Mission Community is encouraged to have a Mission Action Plan. This is a working document which helps the local church look outwards, to grow in prayer, to make new disciples and to serve the people of Devon with joy.

Like many shire counties, the population of Devon is older than the national average, not least because the county is a popular destination for people in retirement. This represents both a gift and a challenge. Demographic projections underscore the vital importance of evangelism. In 2019 the Diocesan Synod identified four key areas for the investment of time, energy and resources in our quest to make new disciples:

- Families and children: getting faith back into the home.
- Young people aged 16-25.
- Older people in the community, including fostering peer evangelism.
- The Fringe - mindful of the fact that the Church in Devon, unlike many parts of the country, has retained a generous number of occasional worshippers.

The parish share scheme is designed to distribute the financial costs of the diocese equitably. The Common Fund pays for the clergy, their training, housing and central costs, but it only works if each Mission Community contributes regularly. We support all Mission Communities

in their financial administration to develop efficient ways to collect and manage resources through the Parish Giving Scheme.

The diocese keeps all aspects of its mission strategy under constant review in the light of accumulating experience. The key priority for members of the Bishop's Staff is to forge creative partnerships in the Gospel and to foster vibrant expressions of God's Mission in local settings. We have a number of church plants and fresh expressions of church, which we are learning from and seeking to develop across the diocese.

If our Mission Communities are to flourish, they need to embody the life of Jesus Christ in the power of the Holy Spirit and to share that life with others. Jesus came so that we can have life in all its fullness. This is our prayer for the renewal of the Church in Devon.

## 1.5 Diocesan Leadership and Governance

Our diocese is led by the Bishop of Exeter, The Right Reverend Dr. Mike Harrison. He is supported by the Suffragan Bishop of Plymouth, The Right Reverend James Grier, the Suffragan Bishop of Crediton, The Right Reverend Moira Astin; and the Bishop's Staff which includes the Bishop's Chaplain, four Archdeacons, the Dean of Exeter Cathedral, the Diocesan Secretary, the Dean for Women in Ministry and the Director of People Services. Names and contact details can be found at the end of this section.

The Diocesan Synod should be thought of as 'the parliament' of the diocese. Synod assists the Bishops and their staff to support the work of the diocese. As most of its members are elected, it helps to provide a system of democratic representation and accountability.

### Bishop's Council

The Bishop's Council is Synod's Board which oversees and takes forward Synod's decisions outside of full Synod meetings. Most of its members are elected.

### Bishop's Staff Meeting

Although an informal area system operates in the diocese, the Bishop's Staff Meeting (BSM) acts as a coordinating group, sharing decisions and identifying priorities across the diocese. There is a considerable emphasis upon this co-operative and collegial mode of working which attempts to model a Christian way of working for the diocese as a whole.

The Staff Meeting currently includes the Bishops and Archdeacons, together with the Diocesan Secretary, the Director of People Services, the Dean of the Cathedral, the Dean of Women in Ministry and the Director of Mission and Ministry. The Bishop's Chaplain acts as clerk. Apart from August, the Bishop's Staff meets monthly, beginning with the Eucharist and concluding with lunch. There is usually an annual residential meeting in late January or early February.

### Bishop's Strategy Group

The Bishop's Staff Meeting is operational in emphasis. It is complemented by the regular meeting of the Bishop's Strategy Group (BSG) of which the Bishops, Archdeacons, the Dean and Dean of Women in Ministry are also members. The group includes the key Diocesan Officers and the Chairs of the Houses of Clergy and Laity. This larger forum exists to exchange

information across departments, to facilitate collaboration, and to plan strategically for the implementation of the Diocesan Vision and Strategy. Recently, the BSG has been strongly focused on the preparation and strategy for the successful Pray, Grow, Serve 2025 bid.

## **Exeter Diocesan Board of Finance**

The Exeter Diocesan Board of Finance (EDBF) is the financial executive of the diocese, concerned with budget, payment of stipends, parish share collection, employment of salaried employees, clergy housing and the general affairs and assets of the diocese. Members of the Bishop's Council act as the Board's Directors. It was incorporated in 1922 as a company limited by guarantee and its governing documents are its Memorandum of Articles of Association. The Board is also registered with the Charity Commission.

The EDBF's responsibilities include:

- Management of the funds and property of the diocese.
- Preparation of annual estimates of expenditure.
- Advising on action needed to raise the income necessary to finance expenditure.
- Oversight of expenditure by bodies in receipt of Diocesan Synod's funds.
- Advising Diocesan Synod of the financial aspects of its policy and other matters.
- Acting as the employer to salaried diocesan employees.
- Maintaining the books for various diocesan bodies and trusts.
- Relevant advice on financial matters to Parochial Church Council (PCC) members, through the Finance Team.

## **Diocesan Teams**

There are around 60 lay and ordained people employed by the EDBF, whose work is arranged to focus on the Director of Mission and Ministry the goals of the diocesan vision and strategy to 'Grow in Prayer, Make new Disciples and Serve the People of Devon with Joy'.

These employees work in the following teams: Education, Mission and Ministry, Communications, Property & Church Buildings, Finance, Safeguarding, Vocations, Synod Office, Archdeacons' PAs, and People Services..

## **The Old Deanery**

The majority of EDBF employees are based at the Old Deanery in Exeter, a stone's throw from the Cathedral.

## **The Bishop of Exeter's Senior Staff Team**

The Bishop of Exeter - The Rt Rev Dr. Mike Harrison,  
The Palace Gatehouse, Palace Gate, Exeter EX1 1HX  
01392 272362 [bishop.of.exeter@exeter.anglican.org](mailto:bishop.of.exeter@exeter.anglican.org)

The Suffragan Bishop of Crediton - The Rt Rev Moira Astin  
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The Suffragan Bishop of Plymouth - The Rt Rev James Grier  
St Mark's Church, 1 Sanctuary Close, Plymouth PL2 1EN  
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The Archdeacon of Barnstaple - The Venerable Verena Breed  
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The Archdeacon of Exeter - The Venerable Andrew Beane  
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The Archdeacon of Totnes - The Venerable Douglas Dettmer  
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The Archdeacon of Plymouth - The Venerable Jane Bakker  
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01752 858382 [ADP@exeter.anglican.org](mailto:ADP@exeter.anglican.org)

The Dean of Exeter - The Very Reverend Jonathan Greener  
Cathedral Offices, 1 The Cloisters, Exeter EX1 1HS  
01392 273509 [dean@exeter-cathedral.org.uk](mailto:dean@exeter-cathedral.org.uk)

Diocesan Registrar - Alison Stock, Partner, Birketts LLP  
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Diocesan Secretary - Stephen Hancock  
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Dean of Women in Ministry - The Rev Preb Samantha Stayte  
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01803607709 [deanofwomen@exeter.anglican.org](mailto:deanofwomen@exeter.anglican.org)

Diocesan Director of People Services - Anthea Carter-Savigear  
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## Section 2: Appointment and Office

### 2.1 Varieties of Tenure

#### **Common Tenure**

Common Tenure is the result of a number of years of careful deliberation concerning the way to deal appropriately with the issues that have developed from the increased level of legislation in the secular world, which affects the employment of individuals and groups.

It became apparent that the process for holding office that existed in the Church of England no longer sat comfortably with the secular process of employment. Through Common Tenure the Church sought to maintain the system of office holding which is valued by both clergy and laity in the Church while allowing for the introduction of certain rights equivalent to the rights enjoyed by those in secular occupations.

Therefore under the *Ecclesiastical Offices (Terms of Service) Measure 2009* a new form of tenure for clergy office holders called Common Tenure came into effect on 31st January 2011 and all clergy appointed after this date hold office under Common Tenure. It also applies to all those who held office prior to that date but did not have the freehold.

The significant changes Common Tenure made to the way in which clergy hold office in the Church of England, the provisions of the terms of service which confer additional rights and obligations, are set out in the *Ecclesiastical Offices (Terms of Service) Regulations 2009* Regulations 1 – 33. These are summarised below.

Common Tenure applies to stipendiary, non-stipendiary and Self Supporting Ministers, including House for Duty and Curates.

Common tenure confers several **rights and obligations** for office holders:

- An entitlement to be provided with a written Statement of Particulars setting out the terms of the appointment.
- An entitlement to an uninterrupted rest period of not less than 36 hours in any period of seven days.
- An entitlement to annual leave (see section 4.2).
- An entitlement to maternity, paternity, parental and adoption leave in accordance with statutory entitlements.
- An entitlement to request time off, or adjustments to the duties of the office, to care for dependents in accordance with directions given by the Archbishops' Council and Central Stipends Authority.
- An entitlement to spend time on certain public duties (such as jury service) other than the duties of the office, with the matter being determined by the bishop if there is any dispute.
- Access to a grievance procedure and supporting advice.

- Rights in respect of housing.
- A right of appeal to an employment tribunal if removed from office on grounds of capability. The Exeter Diocesan Board of Finance will be the 'responsible body' for this purpose.

The legislation requires all office holders under Common Tenure to:

- Cooperate and participate in Ministerial Development Review (MDR) and Initial Ministerial Education (IME) in the case of Assistant Curates in Training.
- Participate in arrangements approved by the diocesan bishop for Continuing Ministerial Development.
- Inform a person nominated by the bishop when unable to perform the duties of office through sickness.
- Undergo a medical examination where the bishop has reasonable grounds for concern about the office holder's physical or mental health.

Other provisions included in the legislation are:

- The only mechanism for making clergy officeholders 'redundant', is through pastoral reorganisation. The legislation extends the right to be consulted on any pastoral scheme to all office holders under common tenure in receipt of a stipend or housing who would potentially be affected by the scheme.
- The legislation introduces a capability procedure when the performance gives reasons for concern.

Download the Ecclesiastical Offices (Terms of Service) Measure 2009 and the Terms of Service Composite 2017. Further details about Common Tenure are available from the Church of England website and on the diocesan website.

### ***Freehold***

Those clergy who held freehold at the date of the implementation of Common Tenure were invited to transfer but were not obliged to do so. Many clergy holding a freehold office did transfer to Common Tenure but there remain a few clergy still holding office under freehold in the diocese. Those clergy who currently hold the freehold of their parish may choose to continue to do so on all their existing terms until they resign, retire or move posts. They may also choose to opt into Common Tenure at any time.

Freehold office may additionally be brought to an end through ill health, after a breakdown of pastoral relationships or through the effect of pastoral reorganization as well as for disciplinary reasons. When a freeholder leaves the post or retires, the ensuing vacancy automatically becomes a Common Tenure Post.

Although Ministerial Development Review is optional for freehold office holders they are strongly encouraged to participate by the Bishop.

## Curates, House for Duty and Self Supporting Ministers

Curates can be appointed on either a stipendiary or self-supporting ministry (SSM) basis. On appointment to a curacy role, individuals will have a clear Statement of Particulars that sets out the detail and arrangements for the role. All curacy posts are held under Qualified Common Tenure, which are time-limited posts. Under these terms, where a curacy needs to be extended (e.g. because of maternity leave), a revised training programme will be agreed by the Director of Mission and Ministry and a revised Statement of Particulars issued by the Archdeacon.

Self Supporting Minister (SSM) is a term which describes clergy licensed to Mission Communities who do not receive a stipend. They may continue in their other paid employment, be retired on a pension, be financially supported by a partner or have independent means. SSMs include Curates and Associate Priests, clergy working in sectoral roles, and Ministers in Secular Employment (MSE). Some colleagues work on less than a full stipend and offer some of their work on an SSM basis. Normally retired clergy and full-time Chaplains would not be considered as SSMs.

House for Duty clergy are normally licensed in the diocese as associate ministers together with a priest in charge.

For more detail about the terms and conditions of service for these posts please go to **Appendix 1** and the diocese website.

### 2.2 Key Documents For All Forms of Tenure (Common and Freehold)

**For all clergy** – there are a few key documents giving details of rights and responsibilities within the Church of England that all ecclesiastical office holders should honour regardless of their form of tenure. These include:

- The Ordinal which describes the role of the office holder in a number of different ways at ordination.
- The license /deed of appointment from the bishop.
- The role description (stipendiary clergy)/ ministerial working agreement (associate clergy) or learning agreement (assistant curates in training).

In addition, it should be noted that **all clergy, regardless of their form of tenure**, are subject to the provisions contained within:

- **Canon Law** - The Canons of the Church of England set out church legislation which governs the way an office-holder should carry out his or her role.
- The Clergy Discipline Measure (see Section 11.2).
- The current law related to patronage and the appointments procedure - Patronage (Benefice) Measure 1986.
- Anti-discrimination legislation - apart from specific exemptions conferred by the Priests (Ordination of Women) Measure 1993 and the Equality Act 2010, the

Church is subject to discrimination legislation in the same way as all other organisations.

## Statement of Particulars

Clergy who hold office under Common Tenure are entitled to a written Statement of Particulars setting out the obligations and rights of office holders conferred by the Ecclesiastical Offices (Terms of Service) Measure 2009 and the Ecclesiastical Offices (Terms of Service) Regulations 2009. The Statement of Particulars is supported by these Clergy Terms and Conditions of Service (this handbook), which provide more detailed information about local diocesan arrangements.

The Statement of Particulars (SoP) is a factual statement of the basic terms and conditions of service that apply to the holder of a particular office. The legal obligations referred to in the SoP are binding because they derive from legislation to which office holders are subject (principally the Terms of Service Regulations and the Canons). It is not an employment contract.

The information that must be provided in the Statement of Particulars is set out in the Ecclesiastical Offices (Terms of Service) Regulations. Further information can be found on the Church of England website.

## Role Description

When taking up a new appointment, office holders are issued with a standard role description/ministerial working agreement/ learning agreement as well as their SoP. This document will be a key document for office holders as it will guide their ministry on a day to day basis as well as the longer term development of the role. As such this document should be referred to and brought along to any Ministerial Development Review (MDR) or the IME in the case of curates in training.

At their six month review with the Suffragan Bishop, specific areas of focus for the ensuing year will be discussed and identified. After about 18 months in post and at similar intervals thereafter, office holders will participate in Ministerial Development Review (MDR); as the individual's ministry develops over time, changing tasks and responsibilities will be identified in MDR summary documents and will become part of role description, building upon the initial work priorities identified in the Profile for the role.

### 2.3 Nominated Officers

In each diocese, the Bishop is required to nominate diocesan officer(s)

*'...responsible for agreeing and issuing Statements of Particulars, overseeing the implementation of common tenure and administration of the regulations and the Ecclesiastical Offices (Terms of Service) Measure 2009 ('the measure').'*

**In the Diocese of Exeter, the nominated officers are the Archdeacons.** Any SoP will therefore be signed and issued to the office holder by their Archdeacon. If an office holder has any queries or concerns, they should seek advice and assistance from that Archdeacon in the first instance. Although this is not a legal contract to be signed, the appointee should acknowledge receipt in writing. The Archdeacon also has access to professional advice from the Director of People Services, who may be able to assist.

## 2.4 Fixed Term Appointments Held under Regulation 29

Under the Ecclesiastical Offices (Terms of Service) Regulations 2009, clergy appointments may be made on a fixed term basis for any of the following reasons:

- Short to medium term appointments to cover sickness or other reasons for an office holder's absence from duty.
- Clergy who are over 70 years of age.
- Those in training posts (who must complete their 4 year training period) / probationary posts.
- Posts with designated time-limited funding or sponsorship.
- Posts created by a Bishop's Mission Order under the Dioceses, Pastoral and Mission Measure.
- Posts designated as being held in conjunction with another office or employment.
- A locally supported ministry post (e.g. a locally funded curate post) can only be designated as such if:
  - The post is held by an assistant curate who is not in sole or principal charge of the parish in which he/she serves.
  - The PCC has entered into a legally binding agreement with the EDBF to meet all the costs including stipend, expenses, pension and housing.
- For other reasons where an interim appointment is appropriate (up to a maximum of three years) see the relevant Church of England Guidance for Interim Posts.

### ***Appointment Status***

It is important fixed term appointments are used appropriately and in line with UK Employment Law. Under secular employment law the rights of individuals on fixed term arrangements (Fixed Term Employees Prevention of Less Favourable Treatment Regulations 2002) ensures all on fixed term contracts have clear rights including having the same access to support, training, and development.

Under Qualified Common Tenure, for a fixed term post, the Statement of Particulars will always set out the reasons for the post being fixed term and have a specific end date; as well as setting out the rights of the individual at the end of employment and the diocese responsibility. Any prospective candidates for the post must be made aware of these conditions from the outset.

Fixed Term Regulations require employers to offer access to the occupational pension scheme on the same basis as permanent individuals, so fixed term clergy are automatically enrolled into the Church Commissioners Clergy Pensions Scheme

Prior to the end of a post the Diocesan People Services Team or the Archdeacon's office will be in touch with the individual concerned to offer appropriate People Services support.

Where the office is held under fixed term or is time limited because it is a training post of Regulation 29(c) the guidelines for completing the curacy will be followed. This also sets out

the policy for when extending the length of a curacy is recommended and the process to be followed. Any agreed extensions to a curacy training period will be formalised with a revised Statement of Particulars or a statement of change of the SoP to be issued by the Archdeacon.

### ***Reviewing or Extending a Fixed Term Arrangement***

Prior to the end of an office held on fixed term appointment the Archdeacon will contact the individual concerned to schedule a meeting to review the fixed term period. Depending on circumstances, the outcome may either be the end of the fixed term post or an extension to the fixed term post.

Where a fixed term appointment is to be extended this will be for a further defined period, with the reasons and new date explained and agreed. To confirm any arrangement, a revised Statement of Particulars will be agreed.

### ***Interim Posts***

Guidance on Interim Posts made under Regulation 29 (7D) of the *Ecclesiastical Offices (Terms of Service) Regulations 2009* as amended by the *Ecclesiastical Offices (Terms of Service) (Amendment) Regulations 2011* require Bishops to have regard to this guidance. The changes are:

- A new category of fixed term post has been created whereby an appointment can be designated as an interim post providing there is good justification for not making it permanent.
- Bishops are required to have regard for this guidance when making interim appointments.
- Interim appointments can be made for a maximum of three years and only be renewed once.

The Church of England Interim Posts basic guidance and the Interim Posts supplementary advice.

### ***Appointments Subject to Pastoral Reorganisation Under Regulation 30***

Where the Mission and Pastoral Committee of the Diocese has invited the views of interested parties before submitting proposals to the Diocesan Bishop, the post may be designated under regulation 30 as an alternative to suspending presentation and appointing a priest in charge. The post would be held subject to pastoral reorganisation and a priest in charge may be appointed on a limited term basis. If the priest remains in post for over 5 years the post becomes permanent.

## **2.5 Priests Over 70 in the Diocese of Exeter**

Those who hold office under Common Tenure are required to retire at 70 and apply for Permission to Officiate (PtO). Guidance about applying for PtO can be obtained from the Suffragan Bishops' PAs. This policy applies equally to stipendiary and self-supporting office holders.

Occasionally, it may be appropriate for a Common Tenure office holder to remain in office beyond 70. Regulation 29A of the *Ecclesiastical Offices (Terms of Service) Regulations 2009* (the

Regulations) allows the Diocesan Bishop to issue a direction to that effect for a time-limited period, which in the Diocese of Exeter would be two years.

The Bishop may only issue a direction if he or she considers that the pastoral needs of the parish or of the diocese make it desirable to give the direction. It may not be issued in order to enhance someone's pension provision or retain the status of an office holder purely for personal reasons. It is not a reflection on someone's ministry if the Bishop's decides not to issue a direction. There should be no expectation on the part of the office holder or the parish that a direction will be issued.

As with office holders on Common Tenure, office holders aged over 70 are required to give three months' notice of resignation or retirement, though this can be shortened or waived by the Diocesan Bishop.

Common Tenure office holders aged over 70 cannot claim casual duty fees or occasional office fees (50% of the DBF part of the fee), even if they are SSMs or House for Duty priests. The only exception to this is that if SSMs suffer a loss of earnings as a result of conducting a service or if there are other exceptional circumstances, the Suffragan Bishop can give permission for them to receive some of the fees. This must be recorded in their Statement of Particulars.

The full policy guidance is based on the *Ecclesiastical Offices (Age Limit) Measure: Guidance Issued by the Archbishops' Council (October 2017)* along with the policy on Applying for PtO.

## 2.6 Other requirements

### The Five Guiding Principles

In July 2014 legislation was passed to enable women to be consecrated to the episcopate in the Church of England. This means that the Church of England is now fully committed to all orders of ministry being open equally to all, without reference to gender. The Church of England also remains committed to ensuring that those who on grounds of theological conviction cannot receive the ministry of women priests or bishops are able to flourish. The House of Bishops has therefore agreed Five Guiding Principles as the basis for this mutual flourishing. From January 2015, all candidates coming to a Bishop's Advisory Panel are required to give their assent to all of the Five Guiding Principles. The House of Bishops confirm that the Principles need to be read 'one with the other and held in tension, rather than being applied selectively'.

Therefore all office holders in the Diocese of Exeter are expected to adhere to and to work in ways that are consistent with these guiding principles. For full details see the Five Guiding Principles [document](#).

## The Equality Act

The Equality Act 2010 (“the Act”) came into force in October 2010. It harmonises and replaces previous legislation protecting people from discrimination in the context of their work. The nine characteristics protected under this legislation are:

Age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage and civil partnership, pregnancy and maternity.

The Act offers protection against the following types of discrimination:

**Direct Discrimination:** This occurs when someone is treated less favourably than another person because of a protected characteristic which they have. It includes both ‘associative discrimination’ and ‘perceptive discrimination’.

**Indirect Discrimination:** This occurs when a condition, rule, policy or practice is applied across the board but adversely disadvantages people who share a protected characteristic more than others, and it is not justified – for example, an office is advertised on the basis that it is only open to those with a driving licence, which places disabled people at a particular disadvantage.

Indirect discrimination can be justified if it can be shown that is a proportionate means of achieving a legitimate aim. This means that the employer must act reasonably and should be able to show that he or she has considered less discriminatory alternatives.

**Harassment:** This is unwanted conduct, related to a protected characteristic, which has the purpose or effect of violating an individual’s dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual.

**Victimisation:** This is retaliation against someone who has complained or has supported someone else's complaint about discrimination or harassment. This includes where someone mistakenly believes that the person victimised has done so.

The application of the Act to clergy offices is complex because the legal categories of workers dealt with by the Act are tailored to the secular sphere and do not reflect the particular characteristics of some ecclesiastical offices.

## Diocesan Equality Statement (Clergy)

In the Diocese of Exeter, we believe that:

- All clergy and their ministries, irrespective of status and background, bring invaluable skills and experiences that enable the diocese to achieve its vision of *Growing in Faith, Making New Disciples and Serving the People of Devon with Joy*.
- Openness and transparency in the process of appointment, from the moment a vacancy occurs to someone starting in the post is key to the success of an appointment, no matter what ‘style’ the patronage offers.

Every office holder deserves to be treated with dignity and respect and the Diocese of Exeter is committed to:

- Develop recruitment and selection systems, policies and procedures that promote fairness and equality of opportunity.
- Ensure that parishes are trained so that they carry out the recruitment processes with confidence and pride.
- Create training and development opportunities for all involved in the appointment process, without unfair discrimination within our resources, and offer support on a recruitment by recruitment basis.
- Apart from specific exemptions conferred by the Priests (Ordination of Women) Measure 1993 and the Equality Act 2010, ensure that there is no discrimination where any of the characteristics specified cannot be shown to be a requirement of the job or office concerned.
- Take positive action to ensure equality of opportunity and of treatment on the matters specified across the diocese.

The Bishop of Exeter and his Senior Team, guided by the advice of the Director of People Services, will lead the implementation of this Policy and monitor progress against our commitments.

It is the responsibility of all office holders, both stipendiary and self-supporting; to abide by and to promote this Policy, and any grievance, or other matter relating to it should be taken up, in the first instance with the appropriate member of the Bishop Staff Team or the Director of People Services.

### **Proof of Right to Work**

In accordance with the amendment to the Immigration, Asylum, and Nationality Act 2006, effective from February 29th 2008, any prospective candidate is required to provide proof of the Right to Work in the UK.

### **Medical Clearance**

For those seeking to extend their ministry beyond 70 the diocese reserves the right to ask for a medical certificate. For pregnant women a medical certificate will be issued by the GP to state they are well enough to continue with their duties. We also reserve the right to ask for medical clearance if the diocese has concerns about an office holder's capability or where the office holder has extended and frequent periods of sickness absence.

### **DBS Checks**

All office holders will require a DBS check, the level dependent upon the role, including when moving post or when a new license to PtO is issued. The diocese does not accept DBS certificates from other organisations or dioceses, nor the DBS update service, therefore certificates will need to be renewed every 3 years.

## **2.7 Housing**

The majority of clergy are required to live in accommodation provided for the better performance of their duties. Incumbents generally occupy the designated parsonage house for the benefice, unless otherwise agreed by the Bishop. This is subject to the rights and duties set out in the Repair of Benefice Buildings Measure 1972 and its code of practice.

Every other office holder who receives a stipend, is entitled under the Ecclesiastical Offices (Terms of Service) Measure 2009 to be provided by the relevant housing provider with accommodation reasonably suitable for the purpose. This is known as a 'house of residence'. It is occupied for the better performance of the duties of the office holder. It does not create a relationship of landlord and tenant between the relevant housing provider and the office holder. In the case of a part time stipendiary role, the provision of a house is considered alongside the level of stipend on a case by case basis.

Details relating to the provision of housing and the duties and responsibilities of the housing provider and the officer holder can be found at Regulations 12-17 of the Ecclesiastical Offices (Terms of Service) Regulations 2009 and in such other present and future legislation as may apply. Copies of the relevant documents are available from the Director of Property Services.

Members of the Property Services Team at the Old Deanery are always available to assist with any queries or concerns individuals may have with regard to their housing. In the event of a problem at a clergy house please contact the Property Services Department on 01392 294954. The phone call will be re-directed outside of normal working hours.

The aim of the Parsonages Board is to support office holders and their families with accommodation appropriate to their needs and, as far as possible, to relieve them of domestic concerns in order that they may concentrate upon their pastoral responsibilities. The Parsonages Board undertakes to:

- Maintain the existing housing stock in accordance with statutory requirements.
- Provide suitable houses by building, purchase or improvement.
- Sell unsuitable houses or those which are surplus to requirements as a result of pastoral reorganisation.

## Address

The address of the property as confirmed on the Statement of Particulars is the address where an office holder is required to live for the better performance of his or her duties if applicable.

## Rights and Responsibilities of the Housing Provider

In accordance with Regulations 12 and 13 of *The Ecclesiastical Offices (Terms of Service) Regulations 2009*, the housing provider has a duty to:

- Have the property inspected by a qualified surveyor every 5 years.
- Keep the property in an appropriate state of repair.
- Give reasonable notice of entry to the property except in an emergency to carry out inspections or repairs.

- Pay Council Tax and water rates.
- Insure the property (excluding contents) against all risks.

## **Rights and Responsibilities of the Office Holder**

In accordance with Regulation 14 of the *Ecclesiastical Offices (Terms of Service) Regulations 2009*, the office holder who is in occupation of a house of residence or other accommodation has a duty to:

- Permit the relevant housing provider and its agents to enter the property.
- Use all reasonable endeavours to keep the property clean and free from deterioration, and the garden in a reasonable state.
- Notify the housing provider of any problems with the property as soon as possible.
- Use the property only as a private residence and for other purposes agreed by the relevant housing provider.
- Not make any repairs, alterations or additions without consent.
- If the property is on lease, to observe any terms or conditions of the lease.
- Vacate the property within one month from the date on which the office holder ceases to hold office, and to leave it clean and tidy.

## **Disputes**

If there is a dispute about the performance of the respective obligations of the housing provider and the office holder which cannot be resolved by the Grievance Procedure (see section 14.2) it shall be referred for arbitration.

## **Terms of Occupation**

The terms of the occupation of the property by the office holder may be varied by agreement between the relevant housing provider and the office holder and the Statement of Particulars amended to reflect any such change.

Sub-letting of clergy housing is not allowed except in exceptional circumstances and only with the Parsonages Board's prior consent.

## **Vacating the Property**

The office holder should vacate the property within one month from the date on which he or she ceases to hold office, or within such longer period as has been agreed by the housing provider.

The housing provider shall allow any member of the household of an office holder on Common Tenure who dies in occupation, to continue to occupy the property for a period of at least three months following the office holder's death.

## **Lodgers or Tenants in a Clergy Occupied House**

If office holders are considering having a lodger or tenant in the property, they should first contact the Property Services Department to ask for a copy of the Diocesan policy on Lodgers or Tenants in a Clergy Occupied House, and to discuss the practical and legal implications. This predisposition against the taking in of a tenant is due to the greater legal complications. The policy does not apply to a friend or relative of an office holder staying for a period at the clergy house, but rather to circumstances where rental is being charged.

## **Contacts**

Property Services Department

The Old Deanery

Exeter

EX1 1HS

Telephone: 01392 294954

Email: [property@exeter.anglican.org](mailto:property@exeter.anglican.org)

## Section 3. Managing Finances in Office

### 3.1 Grants

The following grants are available to stipendiary office holders, upon appointment:

**Removal Grants:** The cost of packing and removal of standard household goods will be fully reimbursed. This may not extend to large specialist items such as grand pianos, nor to the dismantling and removal of sheds.

**Resettlement Grants:** Clergy will be offered a resettlement grant of at least 10% of the National Minimum Stipend towards the cost of carpets, curtains and other furnishings. Expenses must be incurred within twelve months of the grant being awarded. If the entire resettlement grant is not spent, please make arrangements to return the balance to the diocese.

**First Appointment Grants:** Individuals taking up a full-time post as assistant curate or deacon for the first time, and those taking up an appointment as an incumbent or minister of incumbent status for the first time, will receive a grant for at least 10% of the National Minimum Stipend towards the cost of robes, theological books and any other equipment needed for the first appointment. Expenses must be incurred within twelve months of the grant being awarded. If the entire First appointment grant is not spent, please make arrangements to return the balance to the diocese.

**Decoration Grant:** A grant of at least £1,200 is available towards the cost of decorating a clergy house before or soon after moving in. If not spent in full, then the residue remains available. A further grant towards decorating is available after 5 years' occupancy. For full details email the Property Services Team [property@exeter.anglican.org](mailto:property@exeter.anglican.org).

**It is a requirement that a record is kept of how both the first appointment grant and the resettlement grant are spent together with receipts.** HMRC may want to see the receipts at any point over the next three years and office holders must have them to hand. A random audit by the diocese is undertaken on 10% of removals every year and we may want to see grant receipts.

Office holders also need to be alert to the tax implications of these grants. The resettlement and first appointment grants are regarded as “income arising from the office” irrespective of when the grant is paid and when the costs are incurred. They are therefore taxable except for amounts paid out from the grants for the following types of item:

- Expenditure on an item which is exempt from tax (See tax return guidance).
- Expenditure on capital items which qualify for Annual Investment Allowance.
- Expenditure on an item which qualifies for tax relief because it is “wholly, exclusively and necessarily in the performance of the duties” of the office e.g. robes and books for conduct of services.

All other items are taxable and should be declared in box 10 on the Ministers of Religion page of the tax return. The grants are refundable in the unlikely event of the individual not taking

up the office. Full details of the above grants are set out in a document called *Exeter Diocese: Removal expenses and grants*. For grants advice or a copy of this document and the necessary forms, please contact the Finance Officer for Clergy Payroll & Grants.

## 3.2 Expenses

PCCs should be committed to reimbursing in full all reasonable expenses properly incurred by office holders in the course of carrying out their duties. As a matter of good practice, clergy should provide their PCC Treasurers with copies of all invoices and receipts relating to their expenses in order that they can be fully justified, and should retain copies for themselves for HMRC.

Reimbursable parochial expenses include postage, stationery, telephone, administrative assistance, robe maintenance, hospitality, provision of a locum, travelling and subsistence. In addition, office holders are encouraged to take an annual retreat (in the middle of a week) which is a clergy expense to be met by the parish.

Clergy should consider making this booklet available to churchwardens and treasurers as well as reading it themselves.

The reimbursement of allowable parochial expenses does not normally attract any liability for national insurance. However, where a PCC provides a taxable benefit in kind, this is liable for Class 1A National Insurance. The PCC should inform HMRC who will send the necessary form at the end of the tax year for completion and return.

For retired clergy and SSMs giving assistance in a vacancy, all reasonable expenses should be reimbursed by the PCC(s).

Expense claims for office holders serving on certain Diocesan committees normally need to reach the Diocesan Office no later than ten working days after the end of the month/quarter. If bank details are provided, a BACS payment will be made; otherwise a cheque will be issued.

The Church of England has provided a guidance booklet for Parochial Expenses for Clergy 2017.

## 3.3 Stipend and Pensions

### Stipend

For **all stipendiary clergy** in the Diocese of Exeter the body responsible for the payment of the stipend is the EDBF. It performs this responsibility through the Church Commissioners, who are not legally the office holder's employer, but they are responsible for paying a stipend to most office holders in parochial or diocesan appointments by monthly instalments paid to the office holder's bank account on the last working day of each month. They are also responsible for making deductions for income tax, national insurance, etc.

There are national guidelines to ensure all stipends are broadly comparable. The National Minimum Stipend (NMS) is calculated and set by the Central Stipend Authority (CSA). However, the actual stipend level is set by the body responsible for the office holder's post, in most cases the EDBF. The diocese calculates stipends in accordance with the method set out in The Remuneration of the Clergy as advised and updated by the Central Stipend Authority (CSA).

**All stipendiary clergy under Common Tenure** are legally entitled to receive at least the NMS. The diocese sets their stipend rates, guided by National and Regional Stipends benchmarks also provided by the Central Stipend Authority (CSA). For stipendiary clergy, the amount they will be paid is noted on their Statement of Particulars. The amount of Diocesan Stipend is reviewed annually with effect from 1st April; however there is no guarantee of an increase.

## Pensions

Whether or not the office holder's service is pensionable will depend partly upon whether or not the individual has already retired from pensionable service and is in receipt of a clergy pension, in which case his or her service will not be pensionable under the Clergy Pension Scheme; **but also** upon whether he or she has chosen to exercise the right to be enrolled in the NEST pension scheme if under 75 years of age and paid more than the minimum amount, which for 2025-6 is £6,420 pa. The precise terms of each individual's arrangements will be clearly outlined in the Statement of Particulars.

Full time stipendiary office holders' service is pensionable within the terms of the Church of England Funded Pensions Scheme. Part-time stipendiary office holders' pension entitlements will be proportionate to the level of stipend they receive. The Church of England Pensions Schemes (CEPS) were established for the purpose of providing pensions and associated benefits for clergy and others in stipendiary ministry.

The age under which clergy are required to retire should not be confused with the scheme pension age. Full details are available from the Church of England Pensions Scheme (CEPS) along with a few useful resources.

The pension paid on retirement depends on the total number of years served. All service to 1st January 2008 was accrued on the basis that the period required for a full pension was 37 years. Service from 1st January 2008 to 31st December 2010 was accrued on the basis that the period required for a full pension was 40 years and the accrual period for service beyond 1st January 2011 is 41½ years.

The clergy pension scheme is contracted into the Second State Pension Scheme (S2P) with effect from 1st January 2011, enabling clergy to receive S2P in addition to the Basic State Pension. The full pension from the Clergy Scheme is reduced from two-thirds of National Minimum Stipend (NMS) to half of NMS for service from 1st January 2011.

To claim a clergy pension contact the Pensions Board at the Church Commissioners on 020 7898 1802 or [pensions@churchofengland.org](mailto:pensions@churchofengland.org) ideally three months prior to claiming, and they will arrange for the necessary paperwork to be completed.

Clergy are also eligible for the State pension, which is paid in addition to the Church Commissioners' pension. It is possible to obtain a State pension forecast by contacting Newcastle Pension Centre, Futures Group, The Pension Service 9, Mail Handling Site A, Wolverhampton, WV98 1LU or 0800 731 0175. Alternatively, an individual can apply for a forecast of their state retirement pension online.

Office holders will not get the State Pension automatically, it must be claimed. Office holders should receive a letter no later than 2 months before reaching State Pension age, giving

directions about what to do. If an office holder fails to receive an invitation letter, there are four ways to make a claim. For details on ways to claim the State Pension follow this link.

### 3.4 Payroll and Tax

#### MyView

The Church Commissioners payroll department has launched a new payroll self-service system for office holders called MyView. MyView is the fastest and most secure way to enable clergy to view and print their pay statements (including some backdated statements), P60 and P11D documents. Clergy can view their personal details, amend bank details and submit an Annual HLC Return using MyView. Click here to access and download the User Guide.

For any questions about MyView, email: [myviewenquiries@churchofengland.org](mailto:myviewenquiries@churchofengland.org).

#### HLC Scheme & Annual HLC Return

The HLC Scheme is run in partnership with the HM Revenue and Customs and is unique to the Church Commissioners' clergy payroll.

It allows an office holder to claim tax relief on the heating, lighting, cleaning and garden upkeep (HLC) costs of the official property. It's a reclassification of part of the stipend which is paid before tax and National Insurance is deducted, it isn't an additional payment. It's viewed as a taxable service benefit because office holders can claim for the costs for the whole property, not just the work-related portion.

In order to qualify for the scheme, office holders need to:

- Be a full-time office holder paid through the Church Commissioners' clergy payroll.
- Occupy, rent-free, an official house provided by the Church of England (or a charity)\*.
- Confirm an Annual Return each year.

\*Please note for clergy couples living in the same vicarage, only the person the house is provided for may claim HLC, both clergies cannot claim HLC for the same house.

If an office holder is part-time or lives in their own home they are also not eligible, however, they are still able to claim tax relief on any work-related heating, lighting, cleaning, and garden upkeep expenses through the Ministers of Religion Tax return under other expenses.

Click on the relevant links for further queries about the HLC scheme or the Annual HLC Return or for more detailed guidance on Ministers of Religion tax returns.

Further information on when and how office holders are paid their stipend; employment status; making statutory deductions in respect of PAYE tax and National Insurance please contact Clergy Payroll Services directly at [clergy.payments@churchofengland.org](mailto:clergy.payments@churchofengland.org) or by visiting the Clergy Payroll webpage.

#### Tax Office

The tax office which deals with the Church Commissioners' payroll is:

HM Revenue & Customs  
Public Department 1  
6 Central Square  
Cardiff, CF10 1XS Telephone: 03000 534720

When contacting this office please quote the Commissioners' PAYE Reference 940/LA73776 and office holders will need to have their National Insurance Number to hand when contacting HMRC.

Office holders should only seek professional help from a suitably qualified person. Specialist clergy taxation services are available. Payment may be made to a clergy spouse for acting as a receptionist, or undertaking cleaning duties etc. This may be allowable against tax. In the first instance please direct an enquiry to the Clergy Payments department via email: [clergy.payments@churchofengland.org](mailto:clergy.payments@churchofengland.org).

Another useful source introducing the complexities surrounding the particular tax position of stipendiary office holders is the Taxation of Ministers of Religion: A Rough Guide (August 2009) issued by the Churches' Legislation Advisory Service (0207 222 1265 [info@clas.org.uk](mailto:info@clas.org.uk))

**Any office holder with concerns about any aspect of his or her tax affairs should seek advice from HMRC or from a professional adviser.**

### Working Families Tax Credits

Office holder families may qualify for Universal Credit a new benefit which replaced six existing benefits and tax credits. Office holders are encouraged to contact the Working Families free legal advice service on 0300 012 0312 for more advice. Alternatively visit the Working Families website.

### 3.5 Financial help

Several national charities exist to assist clergy and their dependants at time of need. For further information on these charities, visit the Church of England website located under the financial section.

The Diocese of Exeter provides sources of financial help which can be found on the diocese website. The support includes the Bishop of Exeter's Clergy fund (application form [here](#)) and several small trust funds administered by Exeter Cathedral for assisting clergy during financial emergencies, retired clergy and widow-widowers in need. The Archdeacon or Diocesan Secretary should be informed of any cases of special need. If, after exploring the circumstances, it is felt that other charities or national bodies may be of help, then the Archdeacon or the Diocesan Secretary will be able to advise on available options. It is always advisable to inform the Archdeacon before making any grant application to cover indebtedness. There are no additional special benefits paid as of right to clergy in the Diocese of Exeter.

### Car Loan Scheme

From 8 May 2015, the Church Commissioners clergy car loan scheme ceased. The Churches Mutual Credit Union (CMCU) now offer car loans. All clergy and church employees are eligible to join and apply for a loan. Go to the website for information and details of the products available.

## Section 4. Day to Day Working Arrangements

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### 4.1 Changes in Personal Details and Circumstances

Whenever a new appointment is made, regardless of whether the individual is coming into the diocese from another, or moving within the diocese, we require a formal notification of personal details.

On receipt of an appointment notification from the Bishop's office, the Archdeacon's PA will contact the individual to welcome them to the diocese, and to ask them to provide details such as bank account details, NI number, next of kin details, etc. All details provided will be treated as confidential.

### 4.2 Rest Periods and Annual Leave

The responsibility for ensuring that leave and days off are taken lies both with the individual concerned and their parish(es). It is important that office holders do take time off. Over-working is detrimental to health and sets a bad example to others.

For clergy on freehold leave arrangements continue as before Common Tenure was introduced. If in doubt please contact the Archdeacon for further guidance.

#### Rest Periods

Office holders are entitled to an uninterrupted rest period of 24 hours in each period of 7 days. The weekly rest period may not be taken on:

- Any Sunday.
- Any of the Principal Feasts of The Church of England as set out in The Canons and Common Worship.
- Ash Wednesday.
- Good Friday.

Once a month clergy are encouraged to set aside an uninterrupted rest period of not less than 48 hours.

#### Time Off During the Week

Full time stipendiary office holders are expected to work a six-day week. Ideally one full day should be taken off a week, and ideally two evenings. Clergy should aim to take some time off each working day e.g. by dividing the day into five sessions and only working four of them. If they have worked all day on several occasions during a week, they should consider taking the whole or part of a second day off during that week.

All office holders need to be prepared to work flexibly because of the nature of the role. Should excessive hours be worked or planned to be worked on a regular basis, it is advisable to discuss their workload with their Rural Dean or Archdeacon so that appropriate priorities can be

discerned and agreed. It is good practice to reflect upon work-life balance in the course of Ministerial Development Reviews and in the context of spiritual direction.

## Annual Leave Entitlement

Office holders are entitled to 36 days or 6 weeks of annual leave (pro rata for part-time clergy). They are also entitled to take the Bank Holidays or time off in lieu. Days may be taken in lieu of the Bank Holiday entitlement in respect of Christmas Day and Good Friday. The annual leave year runs from 1<sup>st</sup> April to 31<sup>st</sup> March. Annual leave may not be taken on \*\*:

- More than 6 Sundays a year.
- Any of the Principal Feasts of The Church of England as set out in The Canons and Common Worship, Ash Wednesday or Good Friday **without the express written permission of the Bishop..**

Office holders are expected to ensure that they take the full allocation of rest days and annual leave each year. It is the office holder's responsibility to make suitable arrangements for annual leave; if any issue is foreseen in this regard, then the matter should be raised with the Archdeacon. Annual leave may not be 'carried over' into the following year, except with the express permission of the Archdeacon in consultation with churchwardens.

When taking annual leave please complete the Notification of Annual Leave form.

*\*\*Self-Supporting clergy may have work commitments which mean that this is not feasible. In such cases annual leave should be agreed with the incumbent.*

## 4.3 Sickness

The obligations and rights for office holders, if they are unable to perform their duties because of sickness, are set out in Regulations 27 and 28 of *The Ecclesiastical Offices (Terms of Service) Regulations 2009*. For further guidance about what happens when an office holder is ill.

A stipendiary office holder is required to:

- Inform the Rural Dean, or if applicable the incumbent, of being unable to work because of illness.
- Inform the Finance Officer for Clergy Payroll if unable to perform the duties of the office because of illness for any period of one day or more.
- Provide a medical certificate for absence of more than 7 days to the Finance Officer for Clergy Payroll.
- For sickness of less than 7 days, complete a Self Certification form.

Both stipendiary and self-supporting office holders are required to use all reasonable efforts to make arrangements for the duties of their office to be performed by another suitable minister during any absence because of illness. This includes notifying a responsible person or authority of the arrangements which have been put in place. This ensures that both the office holder and the parish are properly supported, particularly if the office holder becomes ill for any substantial period of time.

Office holders who do not qualify for Statutory Sick Pay under government regulations or who have exhausted their period of entitlement may be able to claim Employment and Support Allowance.

Following an absence of more than seven days all office holders (including self-supporting and House for Duty ministers) should make contact with both their Rural Dean and their Archdeacon to inform them of the nature of their absence and its likely duration. The Rural Dean is responsible for providing pastoral support and for keeping the Archdeacon updated on the situation. Up to the fifth week of absence, churchwardens are encouraged to organise Readers and clergy with PtO to take services to ensure that the office holder concerned is relieved of duties. The office holder concerned and the Rural Dean should agree the frequency of contact so that the situation can be monitored appropriately without being intrusive.

## Long Term Sickness

Following the fifth week of absence (or earlier in appropriate cases), the Archdeacon will ask the Rural Dean either to arrange provision of other office holders and Readers to take services or to liaise with churchwardens who are prepared to do this. Any fees and/or expenses for visiting clergy/Readers may be covered by the EDBF if they exceed the office-holder's usual level of expenses for that period.

The Archdeacon will arrange to visit the office holder at home or may ask the Rural Dean to undertake this. A written summary of any discussion should be agreed and retained. The purpose of such a visit is to:

- Understand better the nature of the illness and its likely duration, respecting the confidential nature of all medical information.
- Provide pastoral care.
- Agree any support which may be required for the individual (and in certain circumstances also for their family, where deemed appropriate at the sole discretion of the Bishop's senior staff), including access to a counselling service, retreat, spiritual direction or support from other clergy.
- Consider any further support which can be provided to assist the individual in returning to their duties.
- Agree how the absence is to be publicly described (e.g. in communications to colleagues, churchwardens and the wider public) maintaining confidentiality around any personally sensitive information.
- Make decisions regarding the involvement of an independent occupational health provider who can provide information to support the individual or whether it is appropriate to approach the individual's GP for a full medical report.
- Agree the frequency and means of contact and communication between the individual and the Archdeacon.

The Archdeacon will keep in regular touch with the churchwardens to clarify what help is available locally, whilst respecting the confidentiality of the absentee.

The Bishop may, if he has reasonable grounds for concern about the physical and mental health of an office holder, direct that the office holder to undergo a medical examination by a medical practitioner selected by agreement between the Bishop and the office holder in accordance with Regulation 28 of The *Ecclesiastical Offices (Terms of Service) Regulations 2009*.

When approaching 28 weeks of sickness leave, the Archdeacon will arrange to meet (again) with the office holder. A written summary of the discussion should be agreed and retained. The purpose of the meeting should be to:

- Establish the likely prognosis.
- Consider whether any progress has been made and whether a return to work is feasible now or in the near future.
- Make a referral to an independent occupational health provider or arrange a review appointment where they have already been involved.
- Clarify with the individual what the possible options are.
- Consider whether ill-health retirement needs to be considered.
- Consider any other support that may be required for the individual and / or their family.

Where the period of absence continues beyond this point, further review meetings will be arranged. The frequency of these meetings will be decided according to the individual circumstances. The Archdeacon may refer to the Diocesan Director of People Services for guidance.

The Diocesan policy in relation to payment during long-term absence is:

- 28 weeks at full stipend.
- Pension contributions for office holders, and housing (where applicable) will continue to be provided.

Payment of stipend to an office-holder who has been absent from work for illness for any period after the date on which he or she is entitled to receive statutory sick pay is a matter for the Bishop's direction.

Where ill health retirement occurs, careful thought should be given to the 'after care' of the individual concerned. This may include arrangements for the transfer of pastoral care if the person moves to another diocese, the involvement of a Bishop's Retired Clergy Officer, or access to the Churches' Ministerial Counselling Service.

## Returning to Duties

Where the office holder is able to return to their duties after a period of long-term absence, they should have a meeting with the Rural Dean or Archdeacon as appropriate to:

- Ensure the person feels fit to undertake their duties;
- Provide assistance where a phased return to work might be needed and consider how this might be accommodated (where possible).

- Consider whether any reasonable adjustments are required and how these may be accommodated (where possible, see section below on disability).
- Understand whether any other form of support is required.
- Consider who the individual might need to meet with as part of their return in order to 'catch-up' on what has happened whilst they have been absent, e.g. Readers, churchwardens etc.

Where a phased return is required, this should be discussed between the individual and the Archdeacon. Guidance may be sought from the Diocesan Director of People Services, the individual's GP, an occupational health provider or medical practitioner, depending on the circumstances. A phased return may include a range of temporary changes such as reduced working hours or days or reduced responsibilities.

## 4.4 Other Types of Leave

### Leave After Contact with Infectious Diseases

If an office holder has been in contact with any infectious diseases they should not report for duty if their doctor has advised against it. The office holder should inform the Rural Dean, who will contact the Archdeacon. Such absence shall be treated as special leave with pay.

If an office holder has been in contact with scarlet fever, measles, German measles, whooping cough, chicken pox or mumps the office holder should continue to perform their duties unless specifically advised by their GP. As the work of office holders will inevitably bring them into close contact with both young children/nursing mothers and vulnerable elderly persons, the office holder should seek the advice of their doctor if in any doubt about the risk of infection to others.

### Time Off for Public Duties

Office holders may spend time on public duties other than the duties of their office, subject to Regulation 24(2) of the *Ecclesiastical Offices (Terms of Service) Regulations 2009*. Public duties are defined in the Regulations as follows:

- Any work done for a public authority, including membership of a court or tribunal or for a charity within the meaning of The Charities Act 2006 or a Registered Friendly Society.
- Any work done in connection with the activities of an independent trade union representing office holders of a description which includes the person in question.

### Jury Service

Clergy are eligible for Jury Service and should be encouraged to claim their attendance allowance. All office holders (including Bishops) now have to perform jury service, like all other adult citizens. It is not possible to claim exemption, though it is usually possible to defer it once, provided there is good reason. All stipendiary clergy called for jury service will be granted leave of absence with full stipend and should follow the procedure as follows. Self-Supporting Ministers should adapt these guidelines appropriately.

On receipt of the notice of jury service, the minister should send a note of the dates to the Bishops, Archdeacon, Finance Department in the Old Deanery, their churchwardens and immediate colleagues (Rural Dean, other Team Members and Training Incumbent).

Attendance Allowance should always be claimed. The Certificate of Loss of Earnings form should be sent to the Church Commissioners for completion prior to the jury service, having first checked with the Finance Officer for Clergy Payroll for any recent changes. This form will be returned. When jury service is complete, the EDBF should be informed of the amount of Attendance Allowance which has been received. The EDBF will instruct the Church Commissioners to make an appropriate adjustment to the stipend and the monies saved will be available to provide for cover or administrative costs within the parish/Mission Community. For guidance on claiming jury related expenses.

## Special Leave

The Bishop may grant an additional period of special leave in certain circumstances. For Family Friendly Policies and Time Off to Care for Dependents Policy see Section 10. Download the Special Leave Application Form or see the form at **Appendix 2**.

## Parental Bereavement Leave

Office holders do not, at present, have a legal entitlement to parental bereavement leave. However, as per national Church of England guidance, bishops are encouraged to ensure clergy are given the appropriate amount of special leave, and it may be appropriate to match or exceed the statutory two week minimum employees are entitled to under the 06 April 2020 regulations. Regulations to confer the same legal entitlement on clergy office holders that employees have are under consideration by the General Synod. For further information office holders should contact their Archdeacon.

## Disability

Where an individual has a disability as defined under the Equality Act 2010, the Archdeacon will endeavour to provide assistance to the individual (and where appropriate to the parish leadership and churchwardens) so reasonable adjustments can be made to enable the individual concerned to carry out their duties effectively. This could include ensuring the parish(es) have appropriate knowledge and training to ensure local reasonable adjustments are truly in place.

The Archdeacon will liaise with appropriate Diocesan departments (e.g. Property Services, Mission and Ministry, etc.) to ensure that the individual is supported where possible, their needs are addressed appropriately, and that they have access to appropriate professional advice and support. In circumstances where specific equipment is required, e.g. specialist software, adaptations to property etc., the Archdeacon will provide advice on funding and resourcing.

## Section 5. Health, Safety and Security

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### 5.1 Health and Safety

Office holders have health and safety responsibilities, to themselves and their families, and within their churches and church buildings, and parishes. Working from home can bring its own health and safety hazards and office holders should be mindful of good practice there as well as on church premises. If parishes are employing other people such as administrators, there will be health and safety liability for these employees.

For information, advice and guidance, including template policies and risk assessments, please see the Health and Safety Executive's website.

### 5.2 Personal Security

In the event of any incident involving verbal abuse, threats or actual violence to clergy or their family, they should immediately contact the Police and / or (where the involvement of the Police is not considered to be necessary) their Rural Dean or Archdeacon who will endeavour to provide practical and pastoral assistance.

The diocese is committed to doing all it can to provide a safe working environment for all office holders and to equipping them to minister safely. Office holders should take all possible steps to ensure the personal safety of themselves and their families in relation to their houses and church office and vestries. Below are some very basic precautions:

- Ensure porches and entrances are well-lit, and the use of spy-holes.
- Do not invite unknown visitors beyond the office or study in a house.
- Do not leave unknown visitors unattended in an office or house.
- Do not see children alone.
- Ensure someone knows when people will be visiting the house, or if seeing people at an external venue, and ensure someone has a contact number for emergencies.

### 5.3 Safeguarding

The Diocese of Exeter, in line with all dioceses, national legislation, best practice and clear Church Commissioner guidance, has very strict rules and guidelines for issues relating to child protection and the protection of vulnerable adults. All office holders must attend mandatory safeguarding training and this will be monitored and recorded through the Safeguarding Team.

All Diocesan requirements, guidelines and policies can be found on the diocese website and in the Bishop's Guidelines for Ordained Ministry.

## Section 6. IT and Communications

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### 6.1 IT Security and Data Protection

#### Provision of IT equipment and Other Resources

Office holders are required to provide and use their own mobile phone, printer, laptop, tablet, PC etc. for their work. If an office holder requires some financial assistance with the cost of new equipment for work purposes they should discuss such needs with their PCCs.

#### IT and Data Protection

Although the diocese is not the employer of office holders, it is a legal requirement for the diocese to comply with the Data Protection Act 2018 which replaced the Data Protection Act 1998 and came into effect on 25 May 2018. The UK General Data Protection Regulation (GDPR) sits alongside this act and tailors how the GDPR applies in the UK, since 2021.

For further information on Data Protection for Clergy and Parishes, go to the <https://exeter.anglican.org/resources/data-protection/> or contact the Data Protection Team [dataprotection@exeter.anglican.org](mailto:dataprotection@exeter.anglican.org) or phone Annemarie Kendell, Operations Manager & Executive Assistant to the Diocesan Secretary, Main Tel: 01392 294901 Mobile: 07590 443906.

Office holders may hold personal data on their PCs and other devices that might relate to individuals within their parishes, databases of PCC's, funerals, weddings, baptisms and so on. The use of personal devices to create and process information and data related to the office holder's role creates issues that need to be addressed, particularly in the area of data security and compliance and data protection legislation.

Office holders are regarded under Data Protection Law as the Data Controller. This confers on office holders the highest level of responsibilities for keeping and using data under UK GDPR legislation. On a practical level, office holders should take all reasonable steps to:

- Be familiar with any devices and their security features so that the safety of the information held can be ensured.
- Maintain the device, ensuring it is regularly patched and upgraded.
- Ensure that the device is not used for any purpose that would be at odds with the Diocesan policy on the "Use of Email and Internet" or Church of England policies.
- Prevent theft and loss of data; keep laptops in a secure place when not in use, do not leave devices on display in a car, ensure device screen automatically locks when not in use, etc.
- Keep information confidential where appropriate.
- Take responsibility for any software downloaded onto a device.
- Set up passwords, passcodes, passkeys or biometric equivalents of sufficient length and complexity for the particular type of device.

- Set up remote wipe facilities if available and implement a remote wipe for a lost device. Most suppliers of mobile phones, and some tablet devices offer a remote-wipe service. This may have to be configured in advance by following the supplier's guidance, usually on their web pages. Links for [Apple OSX devices](#), [Windows phones](#), [Android phones](#).
- Use cloud based storage for files and emails, e.g. OneDrive, iCloud, GoogleDocs, etc, and avoid using memory sticks unless they are encrypted.
- To not hold any more information than is necessary and in line with current Church of England data management guidelines [Record Management Guides for parishes](#) and be especially aware of sensitive, personal or confidential information, or that which may be of commercial value.
- Carry out regular “housekeeping” and delete any information as soon as possible once it is no longer required, including information contained within emails, unless required for audit trail purposes.
- Report the loss of any device containing diocese or PCC data (including email) or security breach to the Archdeacon or the Data Protection Team immediately (there is a legal requirement to report data loss under the General Data Protection Regulations).
- Ensure all data is erased completely if a device is disposed of, or sold/transferred to a third party

## Data Privacy Statement

The Bishop and his officers need to keep information about office holders for purposes connected with their office in the Diocese of Exeter. This includes recruitment, financial matters relating to their stipend and other entitlements, ministerial development, retirement etc.

The Bishop and his officers may also keep information on an office holder’s health for purposes of compliance with health and safety regulations. More specifically, to consider how health affects an individual’s ability to carry out their duties; if they are disabled, whether they require any reasonable provisions to be made to assist them; and in relation to sick pay and any other related benefits.

All information provided by office holders will be stored on the Diocesan electronic database in accordance with the UK General Data Protection Regulation (UK GDPR). This is a password protected system that is accessible to and maintained by the approved individuals. Office holders may need to register separately with the Information Commissioner depending on the type of information held. The same may apply to local Parochial Church Councils (PCC), which are separate legal entities. For more information on [UK General Data Protection Regulation \(UK GDPR\)](#), visit the Information Commissioner’s Office website and the Diocese of Exeter Privacy Notice.

## Impact on Wellbeing

Because office holders often have access to their work emails, web sites, etc in the same way and on the same device as for personal emails or messages, this can potentially have a negative

impact on the individual's life-work balance. Office holders are encouraged to find ways to avoid this happening, e.g. using a different email client for work and personal emails, and removing badges and icons and other notifications for personal emails.

## **Conversations When Out and About**

Office holders should be very careful about discussing confidential or sensitive work matters in public places, for example in the pub, on the bus, with neighbours etc. Each one of us is an ambassador for the diocese and the Church of England, and the way we talk, and what we talk about, reflects on us all.

## **6.2 Giving Professional and Personal References**

Office holders occupy a unique position in their local community due to the professing of their Christian faith and the exercising of that faith through the training and license to minister they have received. As such office holders are expected to uphold high standards of conduct when holding office and to exercise a high level of discernment when called upon to give references. Any reference provided by an office holder is given considerable weight and taken with seriousness by those to whom the reference has been addressed. Therefore due regard should be given to the office held and to those the office serves when providing a reference, whether in the form of a written professional reference or a less formal social media based reference.

### **Professional References by Letter**

Written references now come under the provisions of the Data Protection Act 2018 and the UK General Data Protection Regulation 2021 which gives individuals the right to see information kept about them. Acting as a referee is an important job, but office holders should be aware that candidates can ask to see their paperwork, and so an office holder may wish to discuss their reference with the individual before submitting it.

When writing a professional reference the office holder must clearly outline the capacity in which they write and the connection through which the office holders has known the individual. An office holder may give consideration to providing a reference in a purely personal capacity rather than in their official capacity as an office holder thereby making it clear they are not representing the views or opinions of the diocese. An office holder should also add a disclaimer such as, "This reference is given in good faith but without any liability on behalf of the writer or the diocese".

If an office holder is any doubt as to the appropriate response to a request for a professional reference they should seek the guidance of their PCC or Archdeacon.

### **Personal References/Endorsements on Social Media**

When an office holder writes a personal reference/endorsement on social media, that reference/endorsement would be considered to be in the public domain, unlike a letter of reference which can only be seen by those to whom it is addressed, or an endorsement given during a privately held conversation. When an office holder is asked to provide a personal professional reference/endorsement for a fellow office holder, parochial colleague or member of their congregation on a social media site such as, but not limited to, LinkedIn, which refers to their ecclesiastical or pastoral relationship/experience, the office holder should consider

whether the giving of such a reference/endorsement would impact their ability to carry out fairly the duties of their office and whether giving such a reference may be viewed as showing favouritism or preferential treatment to a particular individual.

The office holder should also consider whether providing the reference/endorsement would be viewed by others to be representing the view of the PCC, congregation or wider parish where the office is held and it may in some circumstance be prudent for the office holder to obtain the approval of the PCC or Archdeacon to publicly endorse a fellow office holder, parochial colleague or member of the congregation.

Similar consideration should be given when an office holder publicly endorses a business, service provider or a charity on social media, especially if they have any family or financial connection (whether formal or informal) to the business, service provider or charity.

When an office holder is asked to provide a personal reference/endorsement for someone entirely unrelated to the duties of their office and unknown to their parochial colleagues or members of the congregation, then they should consider how their reference/endorsement might be viewed by the local parish community and by those outside the parish and whether it could cause any difficulties for the office holder in the carrying out of their duties or those of their parochial colleagues. If in doubt the office holder should err on the side of caution and seek further guidance if necessary from the PCC or Archdeacon.

As with providing professional written references, whenever an office holder chooses to write a public reference or give an endorsement on social media they should also make it clear that the reference/endorsement is being given in a purely personal capacity rather than in their official capacity as an office holder thereby making it clear they are not representing the views or opinions of the diocese. The same disclaimer if appropriate can be used.

### 6.3 Working With The Media

There will be times when office holders may be approached by the media. The approach could be positive or negative in character and how it affects the office holder and their church community depends on what the story is and how it is handled. If you are contacted by a journalist please get in touch with Chloe Axford, Director of Communications and Engagement, Tel: 01392 294905 Mobile: 07889 523776 (also available out of hours).

You can also ask the journalist to contact Chloe or another member of the Communications Team directly. An office holder's archdeacon will also be able to provide advice if unable to contact the Communications Team.

**In general, office holders should not comment, give a quote or interview, pose for a picture or agree to any filming before they have spoken to Chloe or a member of the Communications Team.** *However an office holder should use their common sense, for example if their local newspaper has asked to take some photos of the Christmas Tree festival or would like them to write an Easter message, then they don't need to speak to the Communications Team.*

The following tips for working with the media on news stories may be useful:

- Please behave calmly and professionally. Most journalists, photographers and camera crews are decent people and generally not out to get you or trick you.

- If approached when coming into work or leaving home, politely decline to comment but suggest the journalist contacts the Diocesan Communications Team.
- Please ask the journalist for their contact details and pass them on to the Communications Team.
- Part of the role of the Communications Team is to protect office holders from undue attention from the media. An office holder does not need to answer the door or the phone if they feel they are being hassled by the media. If an office holder feels themselves to be in such a situation please contact the Communications Team.
- Be wise when answering telephone calls. If the caller is unknown, ask for their name, number and purpose for calling and inform them someone will call them back.
- It is generally possible to turn a potentially negative story into a positive one if an office holder gets in touch with the Communications Team as **early as possible**, so they can work together on an appropriate media strategy.
- The Communications and Engagement Team offers professional support, advice and training on all aspects of working with the media. Office holders should contact the team if they would like to access this support.

#### 6.4 Social Media Guidelines

The Diocese of Exeter and the Church of England embraces the use of social media in ministry, acknowledging the value of social media as an important tool in mission. The many and varied social media channels provide unique opportunities for office holders to share their faith and good news about the work their church is doing in their local area, allowing office holders and their church(es) to connect with people where they are and build relationships with those they might otherwise struggle to reach.

Social media is immediate, interactive, conversational and open-ended which sets it apart from other forms of communication. As well as the many opportunities social media provides, users should also be aware of (though not put off by) the associated risks.

Office holders should participate with online social media in the same way as they would in any other public forum. An office holder's actions should be consistent with their work and Christian values and they are responsible for the things they do, say and/or write.

The aim of the Communications and Engagement Team is to provide training, guidance and practical support to help churches share faith stories and good news stories in ways which are creative and engaging. They want to help inspire confidence in the message AND the medium and are on hand to guide churches through 'news events' and provide press support.

The website has up to date advice on communication and engagement, including social media on the Communications and Engagement Team pages. You may also find the current Church of England Guidance useful in this context.

## Use of Online Meeting Facilities

Clergy are advised to show due care in their use of online conference platforms and to ensure that they are aware of and use the privacy functions. National Church provides this guidance for the safe use of such on-line meetings.

If a meeting is compromised with malicious and distressing content, office holders are to ensure that the incident is reported to the police and to the Diocesan Safeguarding Team.

See here more information on Communications and Engagement in the diocese and the Clergy Social Media Policy. In addition the Church of England has published social media advice aimed at tackling offensive behaviour and misleading content so as to encourage a positive atmosphere for online conversations. <https://www.churchofengland.org/help/social-media-guidelines> .

## 7. Ongoing Ministry

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### 7.1 Growing in Ministry

The Terms of Service set out in Common Tenure confer on office holders a range of rights and responsibilities, including the duty to undertake regular reviews of ministry and participate in a programme of professional ministerial development. The diocese offers a variety of Continuing Ministerial Development opportunities. These are concerned not just with learning and training, but with the flourishing of the whole person in their ministerial context. Relevant provision will depend on each individual, their experiences and needs which inevitably will vary over the years. Programmes are coordinated by the Mission and Ministry Team.

### 7.2 Ministerial Development Reviews

The Diocesan Bishop is required to make, and keep under review, a scheme for Ministerial Development Review (MDR). Office holders serving on Common Tenure are required to participate in MDR. In this diocese, office holders are reviewed every 18 months, apart from clergy in training curacies who will not have an MDR until they have completed their training.

Every other MDR is undertaken with the individual's Suffragan Bishop or Archdeacon. The alternate review in the cycle is conducted with a lay or clergy reviewer. Rural Deans normally have every MDR with a member of the senior staff.

MDR is designed to reflect on an individual's ministry within its broader context and to focus on its current and future development. Accordingly the process identifies personal and Mission Community objectives for each minister in the subsequent period. MDR is designed to help clergy grow in self-awareness by giving them the opportunity to reflect on their present practice and experience. It seeks to address key issues, identify strengths, challenges and needs, and plan coherently for the future.

There are several forms on the MDR page of the diocesan website available to download.

#### Learning Development Plan

As part of an office holder's MDR they will create a learning development plan to focus and support their learning over the next two years. Before the review meeting, the office holder should create a draft using the template on the website and send to the reviewer one week before the meeting. It will then be considered during the discussion. After the meeting it should be updated by agreement with the reviewer.

For further information and to download the relevant forms please go to the diocese website.

### 7.3 Continuing Ministerial Development

It is the Bishop's policy, in line with Common Tenure, that all office holders on Common Tenure should participate in ongoing Continuing Ministerial Development (CMD). They are advised to keep a record of the CMD opportunities in which they have participated. Individuals can

highlight formation, training or development needs through their regular MDRs as their circumstances demand. The diocesan CMD programme can be found on the diocesan training and development page.

The Mission and Ministry Team is always keen to hear of suggestions for CMD. Whilst there are no individual grant allocations for training, if a need is identified through MDR we will seek to support access to appropriate training. Some opportunities for development are:

**Coaching:** We have access to coaching for clergy who want help thinking through a particular issue. Please contact the Director of Mission and Ministry for further information.

**Reflective Practice Groups:** These are available for clergy and offer an opportunity of on-going support in life and ministry. The first term is provided free of charge, thereafter parishes are asked to regard this as a valid expense of office.

**Retreats:** All stipendiary office holders are expected to make an annual retreat, typically of a week, and other clergy and lay ministers are encouraged to do the same. There is no diocesan funding for retreats, but parishes are asked to treat ministerial retreats as an expense of office.

**Sabbaticals:** Times of sabbatical are offered at the discretion of the Bishop and should be seen as an opportunity for conscious development of ministry enabled by rest from ordinary duties, rather than an interlude away from it. A sabbatical is for a period of up to three months, providing space for prayer, refreshment, personal and professional development, study and reflection. For further information visit the diocesan Sabbaticals page.

Anyone interested in applying for a sabbatical should, in the first instance, contact the Director of Mission and Ministry [Ian.Bussell@exeter.anglican.org](mailto:Ian.Bussell@exeter.anglican.org).

## 8. Welfare and Wellbeing

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### 8.1 Clergy Wellbeing Covenant

In February 2020, the General Synod formally affirmed the Covenant for Clergy Care and Wellbeing as an Act of Synod. The covenant is the vehicle through which the church seeks to embed clergy well-being, which is essential to safeguarding, into church life. The principles of the Covenant are contained in three documents, one is directed at clergy, the other two towards bishops and congregations who are asked to consider more carefully the impact of their actions on the well-being of the clergy and their families.

The first is a document for reflection and action for the clergy; this seeks to help office holders consider and understand the character, shape, and boundaries of being in the public eye; to be aware of the way in which their own life and history affect their conduct; and to exercise care in all forms of communication, including social media.

The second is a document for reflection and action for local congregations in which they are asked to support office holders in their church by reviewing their expectations and allowing them opportunities for rest, and to try to imagine life in their shoes.

The third is a document for reflection and action for bishops and the wider church in which the bishops are asked to be role models of healthy ministry. They are reminded of their responsibility to care for ordained ministers through properly resourced education and training, supported through good policies and procedures, and by assessing the impact of new missionary models on clergy care and well-being.

### 8.2 Supporting During Sickness Absence

In times of sickness, the support networks and the pastoral and practical care that local clergy, senior colleagues, and local communities are able to provide are vital. These notes explain the support that the senior clergy and the central services of the diocese can offer. It is based on the following principles:

***Respect for individual dignity and privacy:*** No sensitive information will be shared with anyone beyond the Bishop's Senior Staff and appropriate Diocesan officers, without an individual's prior consent or knowledge. In accordance with current medical practice, medical information will only be shared with an individual's express informed consent.

***Quality pastoral and practical care:*** Contact will be maintained throughout the stages of illness and/or longer-term treatment. As appropriate, links with local networks of colleagues for the best professional, pastoral, and practical care will be sought and offered.

***Medical reports and professional advice:*** Medical reports will be obtained when needed to offer a professional opinion and / or practical advice, suggestions and recommendations in relation to fitness for duty, and any short, medium and longer-term adjustments that will enable an individual to return to full capacity as safely as possible.

**Financial support:** Stipends will be maintained within the appropriate diocesan and Church Commissioners policies. In cases of hardship we will endeavour to secure grants and benefits from other bodies on an individual's behalf.

**Being flexible and focusing on the individual:** We will work with an individual to help them structure their week and workload in such a way that gives maximum flexibility so that they can balance managing their medical treatment with maintaining their effectiveness and efficiency at work. The Bishop may seek independent medical advice to ensure we are giving the most appropriate support.

**Providing information and support:** We will work with an individual to seek out information that may help with their circumstances and, where appropriate and wanted, put people in touch with others known to us who have knowledge of or have been through similar circumstances who can offer support.

**Providing assistance with cover arrangements:** Often an individual is left to make their own arrangements at a time when they are feeling most vulnerable/ill. We will work with the person concerned to lighten this load and help them make appropriate cover arrangements if this would be helpful.

### 8.3 Pastoral Care and Counselling

The diocese recognises that ministry can bring its own stresses, and that ministers are not exempt from the other problems of everyday life arising from family and personal circumstances. It is not always appropriate to seek support from a colleague or senior person, and for many years the diocese has provided short term professional counselling.

The diocese has prepared a Living Well in Ministry handbook for all practicing clergy in the diocese. This reflective tool contains useful links and advice on coping with the unique challenges of life in ministry. It, and other advice can be accessed at the diocesan wellbeing pages.

We work with the Churches' Ministerial Counselling Service (CMCS) which exists to help individuals to deal with the challenging emotional issues they face, whether work related or personal, through short-term professional counselling. CMCS provide an entirely confidential service which can be accessed anonymously through self-referral with no records available to any Diocesan staff concerning who uses the service. The Diocese of Exeter will normally meet the full cost of counselling accessed through the scheme.

Counselling is available for:

- Ordinands and Readers in training.
- Licensed clergy and members their immediate families over 18 living at the same address.
- Licensed Readers and licensed lay workers.

- Retired clergy, widows and widowers of clergy resident in the diocese and anyone with PtO.
- All EDBF employees and Church Commissioner employees working for the diocese.

To begin the process of referral contact our CMCS Area Coordinator, Graham Exon on 07867 009740 or [graham.cmincs@gmail.com](mailto:graham.cmincs@gmail.com).

Graham will take some details and find a counsellor; the individual then arranges when is best to see them. The counsellor will use their skill to help the individual to explore the issues they want to talk about and to gain different perspectives and ways to cope. This will usually be over a maximum of twelve weekly sessions.

The CMCS website includes details of other Area Coordinators who all hold the details of approved counsellors. For further details of the Diocese of Exeter pastoral care and support and information on how to self-refer.

## **Diocese of Exeter Wellbeing Committee**

Since September 2018 a Wellbeing and Pastoral Care Advisory Panel, currently chaired by the Bishop of Crediton, has overseen the wellbeing and pastoral care needs of the diocese. Panel members, including external medical partners, represent the views of ministers, readers, employees, clergy spouses and partners. The Panel meets four times a year to discuss how the diocese can improve the support it offers, and advises on and recommends appropriate support and resources for ministers and employees.

## **Clergy Careers and Transition Service (run by Church House)**

See Section 10, page 61 – Moving On and Retirement.

## **8.4 Relationship Support**

### **Housing Accommodation Needs Arising from Clergy Marriage Breakdown (CMB)**

The Bishop's Staff Team and the EDBF recognise that clergy spouses/partners and families may find themselves in difficulties following the breakdown of a clergy marriage. Living in a Vicarage, being part of the local church and community and the public nature of ministry, can sometimes add stress and anxiety to an already painful situation. The Diocese of Exeter seeks to ensure appropriate care and support for clergy, clergy spouses/partners and families in these circumstances.

The Clergy Support Trust offers help and advice at this difficult time. Office holders should also contact their Archdeacon for further information.

## **Bishops Visitors**

Bishop's Visitors are appointed by the Bishop to work with the clergy spouse after a marriage breakdown. The Visitor is there to provide a practical and visible demonstration of the diocese commitment and concern for the clergy family and to keep the Bishop and other relevant persons informed. The Visitor is regarded as the person who ensures that the estranged spouse

is enabled to cope, not only with the short-term, but with the long-term reconstruction of their life and that of the family.

The Visitor's role is to assess the Church's proper response and to ensure that appropriate pastoral, spiritual and practical help is given including:

- A practical response to emotional, social and spiritual needs such as:
  - Listening and giving non-judgemental support.
  - Providing information and signposting to further help and support.
  - Gathering important information (fulfilling an administration and co-ordinating role on the Bishop's behalf thereby enabling the Bishop to fulfil their role.)
  - Facilitating conversations and meetings and follow up meetings as appropriate.

Office holders should contact the Bishop's Chaplain for further information.

## Alcohol and Substance Misuse

The misuse of alcohol and drugs affects the whole of the country and many wellbeing risk factors, such as social isolation and the cost of living crisis have driven increases in alcohol consumption. The problems related to alcohol and substance misuse can affect anyone, including clergy and their families and they are primarily a health and wellbeing concern.

Ongoing issues relating to drinking or the taking of drugs (illegal or prescription), whether intermittent or continual, by an office holder (or one of their immediate family) can impact an office holder's ability to carry out their duties effectively and safely and can erode relationships with their colleagues and with their parishioners. The diocese will help and support any office holder who has an alcohol or drug related problem to seek help, in confidence, at an early stage. If the problem should begin to affect their duties the diocese will ensure the office holder and the parish are helped in a sympathetic, fair and consistent manner.

## Domestic Abuse

The Diocesan Safeguarding Team will provide independent, unbiased, sensitive and discrete advice and support to anyone experiencing or concerned about domestic abuse.

The Diocesan Safeguarding Team will also support and encourage anyone who may be experiencing or is concerned about domestic abuse to seek advice and support completely independent to the diocese, if they would prefer to speak with a specialist advisor outside of EDBF.

Restored is an international Christian Alliance working to transform relationships and end violence against women. For other help and advice please refer to the Diocese of Exeter Domestic Abuse Policy Statement 2024 and the diocese website for more information and guidance.

For Church of England guidance on Domestic Abuse for clergy, see Responding Well to Domestic Abuse 2017.

**Domestic Abuse Training:** The Diocesan Safeguarding Team have developed a short informal on-line presentation to raise awareness of and consider the key principles to responding to concerns about domestic abuse. For office holders and others who hold Bishops' license, who

complete this on-line module, please confirm completion of this short training by e-mail to [safeguardingtraining@exeter.anglican.org](mailto:safeguardingtraining@exeter.anglican.org) and the office holder's training records will be updated accordingly.

## 8.5 Retirement Support

### Retirement Housing

The Church of England Pensions Board will usually offer affordable retirement housing for clergy through the Church's Housing Assistance for the Retired Ministry (CHARM) schemes. For full details of the schemes and for further information relating to Retirement Housing.

Three types of housing schemes are available and are subject to meeting the qualifying criteria:

**Shared ownership properties:** For those who cannot afford to buy on the open market but have enough savings to buy a 25% share of a property, with the remaining percentage, up to a specified amount being purchased by the scheme providers.

**Rental properties:** For those who don't have enough savings to buy a property through shared-ownership, they can rent a modest, unfurnished home under a tenancy agreement.

**Supported housing:** For those looking to live semi-independently, there are 7 schemes around the country.

### Retired Clergy and Widows' and Widowers' Officers

The local parochial clergy have the primary responsibility for the care of retired clergy, widows and widowers resident in their parishes as part of their cure of souls. It follows that the dioceses responsibility is to support and supplement the ministry of the local parochial clergy. They should assure retired clergy, widows and widowers that they have not been 'forgotten' by the diocese because they have retired, and that they still 'matter'; it is also a way of affirming the validity and value of the ministry they have retired from.

The diocese has appointed officers in each archdeaconry, who are themselves retired, under the leadership of the Archdeacon of Barnstaple, to offer support to retired clergy and clergy widows and widowers when required. They are known as Bishop's Retired Clergy Officer and Clergy Widows' and Widowers' Officer (BRCO and CWWO). Briefly, their ministry offers welcome to those moving into the diocese and those newly retiring, to support the Rural Dean and local clergy in their primary pastoral ministry to the retired, and to be aware of the needs which may arise, and the help or support available.

For a description of the ministry of officers: Role Descriptions for BRCO and CWWO.

### Financial Help

**Clergy Support Trust:** Formally known as Sons & Friends of the Clergy may give retired clergy grants towards nursing or care home care and with financial problems of all kinds, e.g. heating costs, house repairs and decoration which the applicant cannot afford. For further information visit their website.

**Retired Clergy Association:** A registered charity that offers support to retired clergy and their spouses, widows or widowers. Retired clergy from across the diocese are welcome to attend local meetings held on a regular basis. To find out more visit their website.

**St Luke's Healthcare:** Retired clergy and their spouses are eligible for health and other help.

The [Sources of help](#) document also provides information on charities and advice or grant-giving bodies.

For further information about help and support for retired clergy in the Diocese of Exeter.

## Death in Service

If an office holder dies in service, the Rural Dean is the first to be informed of a death and will immediately take action to find other clergy to take over, temporarily, the pastoral care of the parish so that, for example, the services and occasional offices will continue. The Rural Dean will also alert the Diocesan Clergy Widow(er)s' Officer and the Archdeacon/Bishop/ Diocesan Secretary.

The Widow(er)s' Officer will contact the Pensions Board to obtain the lump sum entitlement and the Pensions Board will send a cheque from the National Scheme. The Pensions Board will require a copy of the Death Certificate before they will pay out so the Rural Dean should ensure two copies are quickly made available. The national lump sum payable is 3 times the national minimum stipend for the previous year. The Death in Service lump sum benefits are payable at the discretion of the Pensions Board. Scheme members are invited to nominate beneficiaries.

A widow(er)'s pension is 2/3 of the clergy pension and is reviewed each year. The lump sum death-in-service payment is tax free. For further information on 'Benefits on Death' please refer to the section 8 – Benefits on Death (Pages 16 & 17) of The Church of England Pensions Scheme Booklet.

The widow/er of the office holder will be given help to ensure that a house which is appropriate to their needs and resources can be found but naturally, the parish will need a new incumbent as soon as possible and so a move within three months would be the right timing at which to aim.

When registering a death, it is advisable to obtain at least three copies of the death certificate. These will be required for insurance purposes etc.

Depending upon the widow/er's financial circumstances some government help may be available.

## 9. Work - Life Balance Policies (Family Friendly)

### 9.1 Legal Entitlement to Statutory Leave and Pay

Although clergy are not formally employees, the Church of England has agreed that any legislative changes to the rights of employees in respect to maternity, paternity, adoption and shared parental leave and pay will automatically apply to clergy. What follows is a digest of these diocesan Family Friendly Policies. Clergy are strongly advised to read the full documents which contain additional details.

Stipendiary office holders, by virtue of their payment of National Insurance contributions are entitled to Statutory Maternity, Paternity, Adoption and Shared Parental Pay in the same way as employees.

This applies to office holders on freehold and common tenure. The relevant ecclesiastical regulations:

*Regulation 23, Ecclesiastical Offices (Terms of Service) Regulations 2009*

The Church Commissioners are deemed to be the 'employer' of all stipendiary office holders on the national payroll for the purposes of National Insurance contributions. This means all stipendiary office holders on the national payroll may move between offices without changing their 'employer' for the purposes of Maternity, Paternity, Shared Parental and Adoption Pay even if they move to an office in a different diocese.

Clergy who have a period of ministry as employees will come off the Commissioners' payroll and will thus have a break in continuous service as far as their right to Statutory Maternity Pay is concerned.

The legal entitlements to pay and leave are considered separately because they are distinct rights that apply in different circumstances. There are links to diocesan and national guidance below:

Diocesan Guidance and Policies

Guidance for clergy office holders about to become parents

### Diocese of Exeter Enhancement to Statutory Pay Provision

Each diocese may set its own policies in relation to any Maternity, Paternity, Adoption and Shared Parental Pay provision for stipendiary office holders provided that it meets or exceeds their statutory entitlements. The EDBF offers the following enhanced pay and leave provision for office holders in the Diocese of Exeter:

1. Qualifying stipendiary office holders will receive Enhanced Maternity or Adoption Pay during Maternity and Adoption Leave (i.e. pay in excess of the statutory minimum level), with the level of Enhanced Maternity of Adoption Pay being 26 weeks on full stipend plus 13 weeks at the level of statutory maternity pay.

2. Qualifying stipendiary office holders will receive two weeks' Paternity Pay at full stipend.
3. Qualifying stipendiary office holders will receive Shared Parental Pay of up to 39 weeks (less any weeks of SMP or MA claimed by the office holder or their partner).
4. Qualifying stipendiary office holders will receive the above enhanced diocesan pay rates regardless of their length of service providing all other qualifying criteria are met.
5. Qualifying stipendiary office holders will be entitled to unpaid Parental Leave regardless of their length of service.

Office holders must give the required amount of notice regarding the date from which they want to start receiving Maternity, Paternity, Adoption or Shared Parental Pay. Failing to provide the appropriate notice means the diocese will not be able to recover the statutory pay amount from the Government. In the case of a 'Foster to Adopt' placement, this requirement is waived as impractical, but clergy are expected to give as much notice as they can.

For office holders who qualify for statutory pay, the Diocese of Exeter is responsible for funding the enhancement, whereas for office holders who do not qualify for statutory pay, the Diocese of Exeter is responsible for funding their whole stipend.

**The Application Form for the various types of leave can be found at Appendix 2 and in the standalone Work-Life Balance policies.**

### **Terms and Conditions of Service During Periods of Statutory Leave**

Office holders remain in office while they are on leave which means they retain the rights and responsibilities that go with the office, for example, the right to remain in any accommodation provided for the better performance of their duties and the obligation to ensure that the duties of the office are carried out on their behalf. Office holders also continue to accrue annual leave during periods of leave both paid and unpaid.

As per the Archbishop's Council March 2020 Keeping in Touch Days are no longer applicable during maternity or adoption leave, although clergy are encouraged to keep practically in touch, if they have the capacity and wish to do so.

### **Pension Contributions During Statutory Leave**

The Clergy Pension Scheme ensures that office holders pension contributions are paid during paid statutory leave absence. If an office holder on their return to work wishes to pay pension contributions for the unpaid part of their statutory leave, they may do so and must contact the Finance Officer for Clergy Payroll.

## **9.2 Maternity Leave**

This policy applies to all stipendiary clergy both full time and part-time. Non stipendiary office holders are already entitled to Statutory Maternity Leave regardless of the length of service.

Please read the Diocese of Exeter Maternity Leave Policy which sets out the full policy requirements..

## Entitlement to Maternity Leave

All pregnant office holders are entitled to 52 weeks' Maternity Leave if they give the correct notice to the diocese. All pregnant office holders regardless of their length of service are covered by the statutory maternity leave provision and Statutory Maternity Pay is payable to pregnant office holders if they satisfy the qualifying requirements.

Maternity leave is made up of two parts:

- **OML** - Ordinary Maternity Leave, the first 26 weeks.
- **AML** - Additional and unpaid Maternity leave, the second 26 weeks.

## Enhanced Maternity Pay - Occupational Maternity Pay (OMP)

**Qualifying office holders, regardless of their length of service, are eligible for Occupational Maternity Pay (OMP). This is a diocesan enhanced rate of maternity pay above the Statutory Maternity Pay rate.**

These enhanced maternity pay arrangements are funded by the EDBF and the rates of pay are in line with EDBF's enhanced maternity pay for EDBF employees. These payments are administered in exactly the same way as Statutory Maternity Pay as outlined below.

The enhanced provision is:

- **First 26 weeks: the office holder is paid their full rate of normal pay, inclusive of SMP/MA.**
- **Followed by 13 weeks: SMP paid at the Prescribed Rate which is set by the Government for the relevant tax year, or the Earnings-Related Rate if this is lower.**

## Statutory Maternity Pay (SMP)

**SMP is payable for up to 39 weeks.** SMP will stop being paid if the office holder returns to work. **SMP is payable for those office holders with at least 26 weeks continuous service, ending with the 15<sup>th</sup> week before the Expected Week of Childbirth.** In such cases, the diocese will enhance the pay as outlined above. The diocese will also enhance the pay for qualifying office holders with less than 26 weeks continuous service. All enhanced maternity pay is provisional upon all other qualifying criteria being met by the office holder. If for some reason an office holder does not qualify for OMP or SMP they can apply for Maternity Allowance which is paid by the Department for Work and Pensions.

**SMP is paid at 90% of average earnings for the first 6 weeks, and the lower of 90% of average weekly earnings or SMP for the remaining 33 weeks.**

SMP is paid in the same manner and at the same time as the office holder's stipend would normally be paid. Statutory maternity pay is subject to income tax and national insurance deductions and pension contributions in the same way as normal earnings.

### **Miscarriage, Premature Birth and Still Birth**

For legal purposes, a loss at any stage before 24 completed weeks of pregnancy is called a miscarriage.

The maternity provisions do not apply to an office holder who suffers a miscarriage before the 24th week of pregnancy.

If an office holder who has suffered a miscarriage is not sick but needs time off, we will consider allowing them Compassionate Leave in line with Parental Bereavement Leave (see page 36) or Time Off for Dependants (TOFD). Alternatively, office holders can ask for paid or unpaid leave. If an individual is unable to return to office after a miscarriage for medical reasons, they will qualify for Sick Leave and Sick Pay, provided a note from the GP is provided. However, if an absence continues for a long time after the miscarriage, it may be arguable that it is no longer pregnancy-related.

### **Returning to Office After Maternity Leave**

When an office holder returns they have the right to return to the clergy role in which they were prior to the maternity leave period. The individual has not left office whilst on maternity leave and therefore returns to work in the existing post as of right unless they resign or are removed from post. In the exceptional circumstances where a return to a post is not practical or advisable, the Archdeacon will discuss any available options or alternatives. By default therefore, there is no right to be found an equivalent post on return from maternity leave.

### **Change to Working Arrangements**

Where an individual wishes to return to work but on a different basis, the office holder may wish to negotiate new working arrangements / adjustment to duties when they return from maternity leave and this should be discussed with the Archdeacon.

Although such requests will be considered, there is no guarantee they will be agreed. Any decision will be reached in consultation with the Archdeacon and churchwarden/s or the nominated PCC representative and upon advice from the Diocesan People Services Team, and only after having thoroughly explored the details and implications of the request. If approved, the stipend will be adjusted pro rata to reflect the reduced hours. When new working hours are negotiated there may be further impact on other entitlements, such as the right to be provided with housing.

Any permanent changes to working arrangements will need to be formally agreed with the office holder and Archdeacon and documented in a revised Statement of Particulars and Working Agreement and issued by the relevant Archdeacon.

### **Self Supporting Ministers**

Self-supporting ministers have the same entitlement to Maternity Leave as other beneficed and licensed clergy, but they are not eligible to receive SMP, as they do not receive a stipend.

SSMs may be entitled to SMP if they are employed by another organisation and meet the qualifying requirements through that employment. If a self supporting minister does not qualify for SMP they can apply for Maternity Allowance which is paid by the Department for Work and Pensions. Similarly SSMs are unlikely to qualify for Shared Parental Leave and Pay unless qualifying through employment with another organisation.

If self-supporting ministers are provided with a house for the better performance of their duties, they have a right to stay in the house during any period of leave, as they remain in office during their Maternity Leave. Self-supporting ministers will also need assistance with cover while on Maternity Leave and when returning from leave.

## Maternity Leave During Curacy or Other Time Limited Posts

Under Regulation 29 of *Ecclesiastical Offices (Terms of Service) Regulations 2009*, there are several categories where a post may be given on a fixed term basis. Pregnant office holders in these posts have the same rights as those in other positions.

More specifically, for those in curacy posts, provided the office holder has met her obligations in terms of notification requirements, appropriate extensions to the training or other arrangements will be agreed by the Diocesan Director Ordinands (DDO) or Archdeacon upon her return from maternity leave. However, when the role comes to an end, the SMP rate will apply for the period between the end of post date and the end date of the paid maternity leave.

### 9.3 Adoption Leave

This policy applies to all stipendiary clergy both full time and part-time. Non stipendiary office holders are already entitled to statutory adoption leave regardless of the length of service.

Please read the Diocese of Exeter Adoption Policy which sets out the full policy requirements.

Statutory adoption leave and adoption pay are applied and administered in a very similar way to statutory maternity leave and pay. The intention is to match the two offers.

## Entitlement to Adoption Leave

Statutory Adoption Leave is 52 weeks and is made of:

- 26 weeks Ordinary Adoption Leave (OAL)
- 26 weeks Additional Adoption Leave (AAL)

All qualifying office holders are entitled to 52 weeks of Adoption Leave regardless of length of service. If more than one child is adopted at the same time, only one period of Adoption Leave can be taken.

We reserve the right to request sight of evidence that an office holder has been notified of the placing of a child with them and/ or has parental responsibility for the child.

Where a couple adopt jointly, one member of the couple (the couple must choose which of them will take Adoption Leave) is entitled to Adoption Leave. The other may consider their rights under Paternity Leave and Paternity Pay subject to the qualifying criteria.

## Enhanced Adoption Pay

**Qualifying stipendiary office holders, regardless of their length of service, are eligible for the diocesan enhancement to Statutory Adoption Pay.** This is in line with the diocesan provision for enhanced maternity pay and is funded by the EDBF.

These payments are administered in exactly the same way as Statutory Maternity Pay. To receive the enhanced adoption pay the office holder must meet certain requirements which can be found in the full Adoption Policy.

The enhanced provision is:

- **First 26 weeks: the office holder is paid their full rate of normal pay, inclusive of SAP.**
- **Followed by 13 weeks: SAP paid at the Prescribed Rate which is set by the Government for the relevant tax year, or the Earnings-Related Rate if this is lower.**

## Statutory Adoption Pay (SAP)

Stipendiary office holders with between 26 weeks and 52 weeks service are eligible for SAP. SAP is paid by the Church Commissioners via the normal stipend arrangements and is paid for 39 weeks in total. The rate of pay is 39 weeks at the prescribed rate set by the Government each tax year or 90% of the individual's normal weekly earnings whichever is the lower. **In such cases, the diocese will enhance the adoption pay as per the enhanced maternity pay and the diocese will also enhance the pay for those office holders with less than 26 weeks continuous service providing they meet all the other qualifying criteria.**

After the 39 weeks the individual is entitled to a further 13 weeks unpaid leave which brings the leave up to the 52 weeks available through maternity leave provision. Either partner may receive Statutory Adoption Pay, but not both. The other partner may be entitled to receive Shared Parental Leave and Pay.

To qualify for Statutory Adoption Pay the office holder must meet certain requirements which can be found in the full Adoption Policy.

## Self Supporting Ministers

Self-supporting ministers have the same entitlement to Adoption Leave as other beneficed and licensed clergy, but they are not eligible to receive SAP, as they do not receive a stipend. SSMs may be entitled to SAP if they are employed by another organisation and meet the qualifying requirements through that employment. If a self supporting minister is employed by another organisation they may qualify for Shared Parental Leave and Pay.

## Disrupted Adoption

If the office holder's adoption leave has started but is then notified that either the placement will not take place, or if the child is returned to the adoption agency after placement or if tragically, the child dies after placement, the entitlement to adoption leave and if applicable, adoption pay, will continue for a further 8 weeks from the end of the week in which the disruption occurred, unless the leave and/or pay would have ended earlier in any event.

## 9.4 Paternity Leave

This policy applies to all stipendiary clergy both full time and part-time. Non stipendiary office holders are already entitled to Statutory Paternity Leave regardless of the length of service.

Please read the Diocese of Exeter Paternity Policy which sets out the full policy requirements.

### Entitlement to Paternity Leave

Qualifying office holders are entitled to take **up to two weeks' Paternity Leave**, either one week or two consecutive or non-consecutive weeks. Paternity Leave must be taken within 52 weeks of the birth of the child. For part-time stipendiary clergy a week is the same number of days that is normally worked in a week. Full details of the qualifying criteria can be found in the Paternity policy.

One of the key qualifying criteria for Statutory Paternity Leave is an office holder must have been in continuous service for at least 26 weeks up to any day in the qualifying week. The qualifying week is the 15<sup>th</sup> week before the baby is due. This is different in the case of adoption. **However the diocese will give the same paternity leave entitlement to office holders with less than 26 weeks continuous service providing they meet all the other qualifying criteria.**

An office holder cannot take Paternity Leave if they have first taken Shared Parental Leave and Paternity Leave is not available to an office holder who decides to take Adoption Leave including having taken leave for adoption appointments.

### Enhanced Paternity Pay

To receive the enhanced paternity pay, office holders must meet the qualifying criteria for Statutory Paternity Pay. In such cases full time stipendiary clergy will be entitled to take up to **two weeks at full pay** and for part-time clergy this will be pro-rata. **All office holders who qualify for Statutory Paternity Pay will receive the Enhanced Paternity Pay (full pay) and the enhanced pay provision will be extended to all qualifying office holders regardless of their length of service** but the office holder must still be in office between the qualifying week and the birth of the child.

In addition to which the individual will be entitled to take paid time off work to attend up to two ante-natal appointments (for up to a maximum of six and a half hours per appointment) with the agreement of the archdeacon. The diocese will grant paid leave for ante-natal appointments for fathers irrespective of their length of service. This applies to appointments made on the advice of a registered medical practitioner, registered midwife or registered health visitor.

### Statutory Paternity Pay (SPP)

**SPP will be for one or two weeks continuous leave at the statutory weekly rate or 90% of average weekly earnings, whichever is lower.**

There are several qualifying criteria an office holder must meet in order to claim SSP. In addition to having been in continuous service for at least 26 weeks up to any day in the qualifying week, the office holder must still be in office between the qualifying week and the

birth of the child. They must also meet minimum income threshold levels. See the full Paternity policy for the all the qualifying criteria.

Additional Paternity Leave was abolished in 2015 and has been replaced by Shared Parental Leave. Please see our Shared Parental Leave Policy for details of the more flexible arrangements available to parents and how they can share childcare during the first year of their child's life.

## Self Supporting Ministers

Self-supporting ministers have the same entitlement to Paternity Leave as other beneficed and licensed clergy, but are not eligible to receive SPP, as they do not receive a stipend. However SSMS may be entitled to SPP if they are employed by another organisation and meet the qualifying requirements through that employment.

## 9.5 Shared Parental Leave

This policy applies to all stipendiary clergy both full time and part-time. Non stipendiary office holders are unlikely to be entitled to Statutory Shared Parental Leave as both parents need to be employed to be eligible to claim it. However non stipendiary office holders are entitled to take unpaid Parental Leave.

The qualifying and notification requirements for Shared Parental Leave are quite complex. It is the individual's responsibility to check their and their spouse's eligibility for shared parental leave and pay.

Please read the Diocese of Exeter Shared Parental Leave Policy which sets out the full policy requirements which can be found on the diocese website.

## Entitlement to Shared Parental Leave

Mothers and adopting parents who meet the conditions for entitlement to Shared Parental Leave remain entitled to 52 weeks of maternity leave and can share up to 50 weeks leave (this equates to 52 weeks minus the compulsory 2 weeks of maternity leave).

Mothers and adopting parents who meet the conditions for entitlement to Statutory Shared Parental Pay are entitled to up to 39 weeks of pay and can share up to 37 weeks of pay (2 weeks of maternity pay for the mother are mandatory, giving a balance of 37 weeks which can be shared). If the mother takes 38 weeks or more of Statutory Maternity Pay, Statutory Adoption Pay or Maternity Allowance, then no Statutory Shared Parental Pay can be created.

The office holder must have been in continuous service for at least 26 weeks by the end of the 15<sup>th</sup> week before the Expected Week of Childbirth, or by the date the individual is matched an adopted child. **However the diocese will waive the continuous service requirement in line with Maternity and Adoption Leave and Pay.** The office holder must also remain in the same role while taking Shared Parental Leave.

The office holder must share responsibility for the child with the husband, wife or partner, or be the child's other parent. The husband, wife or partner of the office holder does not have to be working at the date of the birth or when the office holder begins the leave and pay period.

Shared Parental Leave must be taken between the baby's birth and first birthday, or within one year of adoption.

An office holder who exercises their entitlement to Shared Parental Leave and who meets the qualifying requirements is entitled to Statutory Shared Parental Pay.

### **Enhanced Shared Parental Pay**

If an office holder qualifies for the enhanced Maternity Pay, then any Maternity Leave which is curtailed and converted into Shared Parental Leave, the Shared Parental Pay rate will be paid at the same rates over the same periods as Maternity Pay.

Office holders who qualify for Statutory Maternity Pay would receive any Shared Parental Pay at the Statutory Maternity Pay rate.

## **9.6 Parental Leave**

This policy applies to all stipendiary clergy both full time and part-time and all non-stipendiary office holders.

The purpose of Parental Leave is to enable people with parental responsibility to have time off to spend time with and look after a child, or to make arrangements for the child's welfare up to the child's 18<sup>th</sup> birthday.

Please read the Diocese of Exeter **Parental Leave Policy** which sets out the full policy requirements which can be found on the diocese website.

### **Entitlement to Parental Leave**

The Diocese of Exeter offers Parental Leave to all office holders regardless of length of service, provided they meet all other qualifying criteria.

The office holder must be named on the child's birth or adoption certificate or have or expect to have parental responsibility for the child in question and leave must be taken with the purpose of caring for the child.

Qualifying office holders are entitled to take up to 18 weeks of **unpaid leave** in respect of each child or each adopted child under 18 years and before a child's 18<sup>th</sup> birthday. It can be taken by both mothers and fathers and both full time and part-time office holders. Parental Leave taken with a previous diocese counts toward the maximum entitlement.

The maximum amount of Parental Leave that may be taken in any one year in respect of a child is 4 weeks. Parental Leave may not be taken in blocks of less than one week except where the child is disabled in which case it may be taken one day at a time.

We reserve the right to request sight of evidence that an office holder is the parent of a child or has parental responsibility for the child.

## **9.7 Time Off to Care for Dependents**

Office holders have a separate legal entitlement to request time off work or an adjustment to the duties of the office to care for a dependent, whether a child, spouse or elderly relative. These rights and how they should be exercised are explained in separate guidance which also provides further information about special leave which can be granted by the bishop.

Requesting time off or adjustment to the duties of office to care for a dependent.

## **Compassionate/Dependents Leave**

All clergy are entitled to short period(s) of paid leave (usually no more than a few days) to assist in dealing with emergency situations or to make alternative arrangements in instances such as:

- Providing assistance when a dependant is injured, falls ill or gives birth.
- To make care arrangements for a dependant who is ill or falls ill.
- In consequence of the death of a dependant.
- Due to the unexpected disruption or termination of current care arrangements.

## **Dependents**

A dependent is defined in law as ‘a person whose support and maintenance is contingent upon the aid of, or being sustained by, another person, such as a child supported by his or her parents’. This could be any of the following:

- Child;
- Spouse;
- Parent;
- Grandparent;
- A civil partner or other person with whom the individual shares a home;
- A person who lives in the same household as the individual, but who is not their tenant, lodger, boarder or employee; or
- A dependant may also be anyone who reasonably relies on the individual for assistance in cases of illness and/or injury.

## **Dependents Leave Arrangements**

Individuals must let their senior colleague/Archdeacon know as soon as possible of their need to be absent from work, as well as an idea of how long they will need to make suitable arrangements for cover. This is so that appropriate pastoral and/or practical support can be offered and/or arranged.

The amount of time off which is ‘reasonable’ will depend on each set of circumstances. Where prolonged absence is required, individuals should talk to their local senior colleague and/or Archdeacon, as it may be appropriate to arrange an agreed period of special leave, compassionate leave, unpaid leave, or a temporary change in working days/arrangements. The Diocesan Director of People Services should also be notified.

There is no entitlement to paid leave to care for dependents, but if time off to care for dependents is required, speak with the Archdeacon who will generally seek to be supportive in this regard for any short-term leave requirements.

In some cases the individual maybe be asked to provide evidence for their reasons for taking the time off, either in advance or on their return to work. Suspected abuse of this policy will be dealt with as a disciplinary issue under the Disciplinary Procedure.

## 10. Moving On and Retirement

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### 10.1 Ending a Clergy Role

An office holder is required to give not less than three months' written notice to resign from office, although this may be waived by agreement with the Suffragan Bishop where the post is held. **For all clergy**, unless resigning, the term of office may only be terminated by the Bishop in accordance with the following circumstances:

- On the death of the office holder.
- On attaining the retirement age (currently 70) specified in relation to that office in Section 1 of the Ecclesiastical Offices (Age Limit) Measure 1975 (1975 No. 2) or on the expiration of any period which the office holder is permitted to continue in office after the retirement age under Section 2 or 3 of that Measure.
- Where the office ceases to exist in consequence of a pastoral scheme or order made under the Pastoral Measure 1983 (1983 No. 1) or reorganisation scheme made under Part II of the Dioceses, Pastoral and Mission Measure 2007 (2007 No. 1).
- Where the office holder is removed from office following a finding of guilty for an offence under Part VI of the Ecclesiastical Jurisdiction Measure 1963 (1963 No. 1).
- Under any provision of the Clergy Discipline Measure 2003 (2003 No. 3).
- Where the term is fixed or is otherwise limited, on the expiry of the term or the occurrence of the event in question.

**For those on Common Tenure**, it is the aim of the legislation to provide greater security and equality of rights. Under common tenure, the appointment can be offered on either a 'permanent basis' or 'fixed term' as defined in the provisions of Regulation 29 below.

As set out at **Section 3** of the *Ecclesiastical Offices (Terms of Service) Measure 2009*, in addition to the circumstances above, the Bishop may also revoke the office holder's license and terminate the office:

- Where there has been an adjudication on a matter relating to the performance of an office holder under the capability procedures. This can be done following due process including the right of appeal and serving a three-month written notice from the date of the notice.
- In the case of a priest-in-charge appointed to a benefice during a vacancy, when that vacancy comes to an end.
- Where the office holder holds the Bishop's license in connection with a contract of employment and that contract is terminated; in this case the term of office of the office holder is thereupon terminated.

The Church of England recognises that retiring can present considerable financial challenges. It can support an office holder to find a new home if this is the case, and individuals are

encouraged to contact their housing team as soon as possible. Ideally office holders should start to plan for their retirement several years before their planned retirement date. **Please see Section 7.5 Retirement Support for further information.**

## Moving Office

Moving house and changing jobs is a demanding process. It is important that there is the opportunity for farewells, moving, resettlement, rest and retreat before taking up a new office, whilst at the same time honouring obligations to both the new and old parish and/or diocese.

On appointment to another office (whether in this diocese or elsewhere), or when moving into retirement, clergy need to notify the Diocesan Bishop in writing of their decision. Three months' notice is required, though this period may be waived (either in part or entirely) by agreement between the office holder and the Diocesan Bishop.

Before writing, it is often helpful to have an informal discussion with the Archdeacon about exact dates of moving, and about when and how an announcement should be made to parishioners.

## Clergy Careers and Transition Service (run by Church House)

The service provides a safe, confidential space for Church of England ministers who find themselves at a vocational crossroads, or who are seeking development by opening up access to a network of practitioners. The service is available to people who are considering what they might do next or who are seeking a new post.

## 10.2 Resignation

The following are national guidelines about stipend payments and the timings of a resignation:

- The stipend is paid up to and including the date from which the resignation takes effect. If starting a new office, it is usual to be licensed the day after the date on which the resignation takes effect to ensure no loss of stipend or other benefits.
- The entitlement to occupy the current house ends when the license for that role ends. However, there is a grace period of up to one month after the license end date during which the office holder may remain in the property with the agreement of the diocese.
- By negotiation with the Archdeacon and Rural Dean, an office holder moving from a post may normally take any unused annual leave for a maximum of three weeks leading to the date of resignation.
- The maximum period allowed for relocation and resettlement (apart from holiday) shall normally be no more than twenty-one days following on the last Sunday in the parish. This is to enable individuals to have their office up and running for work as well as to organise their domestic accommodation.
- Office holders are not entitled to calculate 'lost days' of either holiday or days off and add them on to their allocation of annual leave either prior to resignation or retirement.

- The Archdeacon (or Rural Dean in the absence of the Archdeacon) is the key person to authorise and advise individuals on these matters. If neither the Archdeacon nor the Rural Dean is available, the Bishop's Office should be consulted.

### 10.3 Retirement

If retiring before the age of 70 office holders will need to give three months' notice of their intention to retire. However in practice many office holders discuss their retirement plans many months in advance with their Archdeacon and the Church of England has a booklet to help with planning for retirement.

Stipendiary office holders who are retiring are advised to contact the Pensions Board at an early stage to discuss their retirement arrangements. Full details are provided in the Pension Scheme Booklet. The formal letter to the Bishop will trigger some processes. These will include:

- A Deed of Resignation for freehold Incumbents not on Common Tenure to sign and have witnessed. Office holders on Common Tenure do not need to sign a Deed of Resignation.
- A letter from the Property Services Department with details of the responsibilities of the office holder prior to leaving the property and some practical reminders about the house. A copy of the letter will need to be handed over to the churchwarden/key holder responsible for the property once it is empty.
- The Archdeacon may also want to meet the outgoing priest to discuss any parish matters that he or she ought to be aware of.
- The outgoing priest should contact the Diocesan Safeguarding Adviser and Archdeacon to pass on any confidential safeguarding information or concerns, which their successor needs to be aware of.

If an office holder is permanently unable to work due to health problems, the individual might be able to take their pension early. This is commonly known as an "ill-health retirement". The latest advice can be found [here](#).

## 11. Dignity In Ministry – Concerns and Conduct

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### 11.1 Responding to Issues and Concerns

If an office holder has an issue or concern about a minister they are encouraged to try to resolve matters in the first instance by contacting the minister concerned to speak with her/him about the matters causing concern, ideally face to face wherever possible. If the office holder is not able to resolve matters having spoken with the minister, or if it is inappropriate to do so, then please contact the relevant Archdeacon.

The Archdeacon will contact the office holder to discuss their concerns and will listen carefully to the issues raised. The Archdeacon will endeavour to resolve any concerns through informal conversations and if appropriate the Archdeacon will arrange to meet with the office holder. The Archdeacon will then write to the office holder (either by letter or email) setting out what action (if any) is to be taken by the Archdeacon and giving a time frame for further communication. Informal action may include arranging for mediation to be carried out at local level, often with the help of people trained as mediators/facilitators. Each case will need an individual tailored response, because no two cases are the same, but each will be followed up appropriately.

Safeguarding concerns relating to a child or vulnerable adult are always handled by our Diocesan Safeguarding Team.

Serious concerns or complaints will be dealt with through the **Clergy Disciplinary Measure** (see below) or the Capability process.

### Our Commitment as a Diocese

Our priority will always be to do what we can to bring people together in order to help restore relationships. We will do this with the individuals concerned in safe and creative ways which ensure mutual respect, fair process, the right to be heard, and the right of reply. We will do this in ways which are appropriate to the particular set of circumstances and in line with the wishes of the individuals concerned. In particular:

- Bishop's Staff are committed to ensuring that adequate time is set aside to gain a clearer picture of all the issues raised.
- All parties will be afforded the opportunity to share or report their concerns, unless in unusual circumstances there is good reason not to do so. Decisions about any further action are made only when there is clarity of objective information and evidence.
- All processes will be:
  - Based on fair and reasonable processes.
  - Clear in judgements and decisions.
  - Managed within a reasonable and clear time frame.

- Tracked carefully.
  - Appropriately documented.
- Practical and pastoral care will be offered to the clergy concerned and their family, and to parishes affected.
- Bishop's Staff will endeavour to ensure that all the individuals concerned:
  - Fully understand all aspects of the processes available and the possible outcomes; and that they have the opportunity to explore these in confidence at every stage.
  - Are aware of the range of pastoral and practical support available.
  - Are aware of timescales and next steps as informal processes are worked through and that these are managed consistently, and as quickly and fairly as possible.
  - Are aware of theirs and others' roles and responsibilities, and of their right to be accompanied by a colleague or trade union representative at any meeting if they so wish. They may not be accompanied by a family member or someone who may have a conflict of interest (e.g. if they might be called as a witness in any formal process). In trying to resolve concerns informally, it would not normally be appropriate for the individual to be accompanied by a trained legal advisor.

## Diocesan Expectations of Clergy

Confident that office holders are determined to live out the commitments and promises they made at their ordination or admission, the Bishop has three specific expectations of those who find themselves in situations of conflict:

- They will do all that they can to bring about a local resolution.
- Where bringing about local reconciliation is a struggle (for whatever reason), and additional assistance, advice, and support may be helpful, they will actively seek this from colleagues, Diocesan support e.g. the Archdeacon or Diocesan Director of People Services, and appropriate national bodies.
- Office holders will fully co-operate with senior staff in their responsibility to seek and facilitate all opportunities for resolving issues e.g. clear roles and responsibilities, and reconciliation (e.g. through facilitation, mediation).

## 11.2 Clergy Discipline Measure

Under existing ecclesiastical regulations the Clergy Discipline Measure 2003 (CDM) sets out clear processes through which the most serious disciplinary issues will be followed up.

The procedures for a CDM issue are set out in the Code of Practice which has been agreed by both the Archbishops' Council and the General Synod and can be accessed at [Clergy discipline](#).

## Formal Written Complaint

The CDM process is started by a formal written complaint of misconduct, which is made to the Diocesan Bishop. There are four grounds on which misconduct may be alleged, namely:

- Acting in breach of ecclesiastical law.
- Failing to do something which should have been done under ecclesiastical law.
- Neglecting to perform or being inefficient in performing the duties of office.
- Engaging in conduct that is unbecoming or inappropriate to the office and work of the clergy.

The complainant must produce written evidence in support of the complaint, and verify the complaint by a statement of truth. The complaint and evidence in support are referred by the Bishop to the Diocesan Registrar for advice as to (1) whether the complainant has a proper interest in making the complaint, and (2) whether the allegations are of sufficient substance to justify proceedings under the Measure. This is the 'preliminary scrutiny' stage.

### **Bishop's Decision**

Having received the Registrar's advice, the Bishop may decide that the complaint should be dismissed, in which case it will proceed no further under the Measure.

If on the other hand the Bishop considers that the complainant has a proper interest in complaining and that the complaint deserves further consideration, the Bishop will invite the office holder about whom the complaint is made ('the respondent'), to send a written answer verified by a statement of truth, together with evidence in support.

The Bishop will then decide which of five possible courses of action available to him/her under the Measure is the appropriate one to pursue. The Bishop can:

- Take no further action.
- Record the complaint conditionally for a period of up to five years, such that if another complaint is made within that time and is dealt with under paragraphs c, d or e below, the two complaints may then be dealt with together.
- Refer the complaint to a conciliator in an attempt to obtain agreement between the complainant and the respondent as to how the complaint should be resolved.
- Impose a disciplinary penalty (but only with the consent of the respondent).
- Require the complaint to be formally investigated by the Designated Officer, a barrister employed in the Church of England Legal Office.

### **Bishop's Disciplinary Tribunal**

The vast majority of cases will be dealt with by the Bishop of the diocese. In the small minority of cases where the Designated Officer is asked to investigate, a report will be produced for the President of Tribunals, who will then decide whether there is a case to answer before a Bishop's Disciplinary Tribunal. Tribunals consist of two members in Holy Orders and two communicant lay members, plus an experienced lawyer in the chair. If a complaint is proved,

the Tribunal can impose the same range of penalties that a Bishop can impose by consent, ranging from a rebuke to lifelong prohibition from exercising any ministerial functions.

## **The Archbishops' List**

Where a penalty is imposed under the Measure, either by the Bishop or by the Bishop's Disciplinary Tribunal, it will be recorded in the Archbishops' List, which is maintained at Lambeth Palace. The respondent will be informed of the particulars to be recorded, and may request the President of Tribunals to review the entry.

## **Proceedings in Secular Courts**

The Measure provides a separate procedure under which a member of the clergy who commits a criminal offence and receives a sentence of imprisonment may be liable to a penalty of removal from office, or prohibition from exercising any functions. A similar procedure is available if a respondent has had a decree of divorce or an order of judicial separation made against him or her and has committed adultery, behaved unreasonably or deserted the former spouse.

### **11.3 Disclosure of Public Interest Matters (Whistleblowing)**

To fulfil their commitment to safeguard and promote the welfare of children and vulnerable adults, all organisations that provide services for, or work with, children or vulnerable adults are required to have appropriate whistle-blowing procedures, and a culture that enables issues about safeguarding and promoting the welfare of children and vulnerable adults to be addressed.

Whistle-blowing may also apply to situations such as those covered by this document, namely unacceptable practice, performance or behaviour in situations unrelated to children or adults who may be vulnerable, and these same principles can be applied.

The Public Interest Disclosure Act 1998 gives workers legal protection against being dismissed or penalised as a result of publicly disclosing certain serious concerns. Whilst the Act does not provide the same protection for volunteers, this diocese wants to adopt the same approach in their protection.

Therefore if any office holder during the course of their holding office believes that any criminal offence has been or is being committed or any legal obligation is not being complied with, they should disclose such matters to the Archdeacon or Bishop's Safeguarding Adviser immediately.

The diocese will investigate such matters and the individual will be informed of the findings. Wherever possible, the identity of any whistleblower will remain confidential if expressly wished. Failure to make such a disclosure by using the above procedure prior to making the disclosure to another person or organisation outside diocese could render the office holder liable to disciplinary action which may lead to dismissal. Please refer to the Clergy Disclosure of Public Interest (Whistleblowing) Policy.

### **11.4 Professional Conduct**

Clergy are expected to behave in a manner consistent with the work of the EDBF and the Church of England. Further information is contained in the Guidelines for the Professional Conduct of the Clergy which is available via the Church of England website.

### **Declaration of Interest/Outside Professional Activities**

Part-time stipendiary office holders and self supporting ministers who are employed by other organisations or who are active in other public roles outside of their office are expected to declare if their other activities might give rise to potential conflicts of interest when carrying out the duties of their office.

Clergy should not engage in any activity which is likely to have an adverse impact on the work or reputation of the diocese of a political, commercial, or professional nature or which is contrary to the values of the Church.

### **Fraud and Anti Corruption**

The diocese is committed to working to the highest financial and legal standards, including in relation to the protection of funds and assets from misuse. In line with the Fraud Act 2006, the Bribery Act 2010 and other regulatory requirements and applicable guidance, the diocese has a 'zero tolerance' policy towards fraud, bribery and corruption and will investigate and seek to take disciplinary and/or legal action against those who perpetrate, are involved in, or assist with fraudulent or other improper activities.

See links for Church of England guidance on the financial accountability of PCCs and other parish resources relating to parish accounting and reporting.

## 12. Dignity in Ministry – Bullying and Harassment

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### 12.1 General Information

#### Policy Implementation

The Diocesan Bishop and the Bishop's Staff Team are responsible for encouraging and monitoring the implementation of this policy and will ensure that appropriate training is available for those charged with addressing situations of bullying or harassment. The policy covers all clergy holding the bishop's license or with permission to officiate, all licensed lay workers, readers, authorised worship assistants and those employed by deaneries, benefices and parishes (e.g. parish based youth, pastoral or administrative employees), employees of the EDBF, Cathedral employees and employees in the Diocesan Bishop's Office. The policy also applies to all office holders at parish, benefice, deanery or diocesan level, including churchwardens, treasurers and all PCC and synod members.

#### Legal Definition of Harassment

Harassment is unlawful under the Equality Act 2010. Employees and officeholders can bring complaints under this and other legislation covering discrimination and harassment.

Harassment is defined under the Equality Act 2010 as any unwanted physical, verbal or non-verbal conduct that has the purpose or effect of violating a person's dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for them. A single incident can amount to harassment. Unlawful harassment may be related to age, race (including colour, nationality, ethnicity or national origin), disability, sex, gender reassignment, religion or belief, sexual orientation, marital or civil partner status, pregnancy and maternity (i.e. 'Protected Characteristics' under the Act). It can include behaviour that is not directed at an individual but is offensive to them, even if they do not possess one of these characteristics. Sexual harassment is one of the forms of harassment specifically outlawed by the Equality Act 2010. (See also 'Dignity at Work' 2008 Ministry Division of Archbishops' Council).

#### Bullying and Harassment in Practice

In practice most people use the terms bullying and harassment interchangeably. Either may be by an individual against an individual or involve groups of people, and may be obvious or insidious. Whatever the form, it is unwarranted and unwelcome to the recipient.

Bullying and Harassment may be persistent or an isolated incident and can amount to severe psychological intimidation, undermining the ability and confidence of the person on the receiving end, and individuals may not always realise that their behaviour constitutes bullying or harassment.

Bullying and harassment are not necessarily face-to-face and can be through means other than verbal communication; they may take place in any setting and they are often not obvious to others and may have to be identified through exploration of patterns of behaviour.

Personal harassment is unwanted behaviour by one individual towards another and examples of harassment may include:

- Insensitive jokes and pranks.
- Lewd or abusive comments about appearance.
- Deliberate exclusion from conversations.
- Displaying abusive or offensive writing or material.
- Unwelcome touching and/or attention.
- Abusive, threatening or insulting words or behaviour.
- Offensive e-mails, text messages or social media content

Bullying is offensive, intimidating, malicious or insulting behaviour involving the misuse of power that can make a person feel vulnerable, upset, humiliated, undermined or threatened. Power does not always mean being in a position of authority, but can include both personal strength and the power to coerce through fear or intimidation.

Bullying can take the form of physical, verbal and non-verbal conduct. Examples of bullying include:

- Physical or psychological threats.
- Continual, undeserved criticism.
- Arbitrary and inconsistent demands.
- Imposition of unreasonable deadlines.
- Shouting, swearing and offensive language.
- Displaying overbearing or intrusive behaviour.

These examples are not exhaustive and disciplinary action at the appropriate level will be taken.

## 12.2 Raising a Complaint

In the diocese we are committed to ensuring that complaints of bullying and harassment are taken seriously and dealt with promptly, fairly, confidentially and sensitively and in strict confidence.

Individuals should be aware that possible outcomes of an investigation into bullying and harassment include: informal opportunities to seek reconciliation (Section 11); the Grievance Procedure (Section 14); and the Clergy Discipline Measure (Section 11).

Clergy who feel they are victims of bullying or are accused of bullying can contact the Diocesan Director of People Services for an informal conversation.

Complaints of bullying or harassment against a member of the clergy will be dealt with either through the informal processes outlined in Section 11 or the Clergy Discipline Measure.

No action, including informing colleagues or contacting the alleged perpetrator, will be taken without the explicit consent of the person who feels he or she has been a target of harassment or bullying, unless the allegation is so serious that it cannot be ignored, for example where there is alleged abuse of children or vulnerable adults. If there is a risk of harm, either to the person concerned or to others, particularly to vulnerable adults or to children, it may be necessary to pass information to the police or social services and the Diocesan Safeguarding Team.

However, in all but the most exceptional circumstances, the need for such action will be discussed with the complainant before it is taken and, wherever possible, their permission will be obtained first. In such circumstance the complainant will, as far as possible within any legal constraints, be kept informed of the actions being taken.

### 12.3 Dealing with Complaints

#### Complaints by Ordained or Lay Ministers – Informal Stage

If an ordained or lay minister is the victim of minor harassment or bullying they can (on their own or with the assistance of a confidential helper) make it clear to the harasser on an informal verbal basis that their behaviour is unwelcome and they are being asked to stop.

However, complaints of personal harassment, particularly of sexual harassment, and bullying can sometimes be of a sensitive or intimate nature and clergy may find it difficult to challenge someone.

In these circumstances an individual is encouraged to raise such issues with a colleague of their choice. This person may be for example a Rural Dean, a senior or other local colleague, or where appropriate an Archdeacon. Diocesan policy is to work with individuals informally in the first instance to try and achieve a resolution, and encourage people to meet, share feelings, and take the opportunity for apologies to be given and reconciliation achieved. If a face to face meeting is not possible, a written request to the harasser may be appropriate and their colleague can also assist with this. Where an informal approach is not possible or appropriate, or has broken down, a formal approach may be required.

#### Complaints by Ordained or Lay Ministers – Formal Stage

Where the informal approach fails or the harassment or bullying is more serious, the individual should bring the matter to the attention of their Archdeacon as soon as possible either verbally, or followed up by a formal written complaint.

If possible, it is a good idea to keep notes or a diary of the harassment or bullying so that the written complaint can include:

- The name of the alleged harasser or bully.
- The nature of the alleged harassment or bullying.
- The dates and times when the alleged harassment or bullying occurred.
- The names of any witnesses.

- Any action already taken by the office holder to stop the alleged harassment or bullying.

On receipt of a formal complaint the Archdeacon will arrange to meet with the individual to discern the most appropriate series of next steps. At this stage anyone dealing with a grievance raised by any person holding office must have regard to the Grievance Procedure Code of Practice and Supporting Advice as set out under Section 8 of the *Ecclesiastical Offices (Terms of Service) Measure 2009 and Regulation 32(1) of the Ecclesiastical Offices (Terms of Service) Regulations 2009*:

The Diocesan Director of People and Safeguarding will be involved at every stage of a formal procedure to monitor the situation on behalf of the diocese. Written records will be kept and retained at all stages.

The process will be broadly the same as for dealing with formal grievances, as in Section 13 (below):

- Stage 1** The office holder should set out their complaint in writing, including details of what happened and when, what steps have been taken to try and resolve the matter and what remedy they might find acceptable, and send their statement to the Archdeacon (unless the Archdeacon is already involved, in which case the matter should be referred to the Suffragan Bishop).
- Stage 2** The Archdeacon or Suffragan Bishop will either investigate themselves or may appoint someone else to investigate the matter on their behalf. The investigation will include obtaining a statement from any person against whom the grievance has been raised ('the respondent'). The investigator will invite the office holder to attend a meeting to discuss the grievance. The office holder may be accompanied by a colleague or trade union representative. The respondent will be invited to express a view, and that view must be taken into account at the meeting. The investigator will need to make a judgement as to whether the parties should be seen together at this stage (or whether bringing them together too soon could inflame things). The respondent too has the right to be accompanied by a colleague. As soon as possible after the meeting, the Archdeacon or Suffragan Bishop will inform the office holder and respondent in writing of their decision as to whether there is substance in the matters raised in the statement of grievance and if so, what steps they are taking or propose to take to resolve the matter. The office holder will also be notified of their right to take the matter to stage three if they are dissatisfied with the decision.
- Stage 3** If the office holder remains dissatisfied or the matter remains unresolved then they may move to appeal by informing the Archdeacon in writing stating their reasons for doing so. The office holder and respondent (and their union representative or other colleague) will be invited to a hearing with the Diocesan Bishop, or another senior member of the clergy or group appointed by him, to discuss the grievance. Procedure for that hearing is set out in Annex 5 of the *Supporting Advice to the Grievance Procedure Code of Practice*. The decision of the appeal body will be given in writing and is final.

## Appeals

The office holder may appeal in writing within five working days of being told of the decision.

The appeal hearing will, where possible, be someone other than the person who held the original hearing. The office holder may bring a colleague to the hearing.

The office holder will be informed in writing of the final decision as soon as possible, usually within two weeks of the appeal hearing. There is no further right of appeal.

## Possible Outcomes

If the report/hearing concludes that the allegation is well founded, and the perpetrator is ordained, he or she may be liable to disciplinary action in accordance with the scope and remit of the Clergy Discipline Measure (CDM).

If the report/hearing concludes that the allegation is well founded, and the perpetrator is a lay person, the Bishop will consider what action to take.

If an individual brings a complaint of harassment/bullying, they will not be victimised for having brought the complaint. However, if the report concludes that the complaint is both untrue and has been brought with malicious intent, disciplinary action may be taken against the complainant within the scope and remit of the Clergy Discipline Measure (CDM).

For further details please refer to the Well-being section of Church of England website.

## 13. Dignity in Ministry - Performance and Capability

### 13.1 Capability Procedure

The principal objective of the capability procedure is to help office holders whose performance falls below an acceptable minimum standard to improve in cases where the problems are not disciplinary in nature. It is expected that most performance-related matters will be identified and addressed informally without engaging this procedure. Nevertheless, there will be occasions where informal steps are not appropriate and in such cases it will be necessary to implement the procedure. If an improvement in performance cannot be achieved through the capability procedure, there is a real possibility that the office holder will be removed from his or her current office, but only as a last resort.

The Capability Procedure is a process to follow up concerns about potential capability, including long term sickness and ill health retirement.

*The Ecclesiastical Offices (Terms of Service) Regulations 2009 Capability Procedure Code of Practice made under Section 8 Ecclesiastical Offices (Terms of Service) MEASURE 2009* sets out the Code of Practice for dealing with capability issues along with Supporting Advice issued by the Archbishops' Council.

The Capability Procedure in the Church of England provides for office holders on Common Tenure with safeguards similar to those provided for employees in secular law, while also providing a way of approaching issues of capability in ministry in an intentional way. The process requires:

- A written statement of grounds/issues.
- A meeting with the right of representation, followed by a decision.
- A right of appeal.

Any office holder under Common Tenure who is removed from office under the Capability Procedure has the right to make a claim in an employment tribunal on the grounds of unfair dismissal. (This right does not extend to 'old-style' freehold incumbents who are not serving on Common Tenure).

A tribunal which finds a dismissal was unfair has the power to award compensation or, if practicable, can make an order for the office holder to be re-instated or re-engaged.

### Explaining Capability

The Code of Practice has been developed in ways which put the emphasis on the office holder in the hope that he or she will be able to recover and restore their ministry with clear guidance, timelines, and support in place. Only when recovery has proved impossible will the office holder be removed from office.

The provision of ministry within the diocese is the responsibility of the Diocesan Bishop and the proper use of a capability process falls within their remit. The Bishop may appoint a suitably

competent person to act on their behalf in this process, particularly in the early stages, and this will be made clear to the individual at the outset.

Capability is about **what you do and how you do it** and how this is demonstrated over a sustained period of time. It is not possible to dismiss someone as an outcome of a single meeting. In assessing what is an acceptable standard of performance, the Bishop will take into account the requirements of the Ordinal, The Guidelines for the Professional Conduct of the clergy (2015), appropriate ecclesiastical legislation, and the specific responsibilities in an individual's role description and MDR summary document.

It is unlikely that a capability process would come out of the blue. Conversations about issues of capability may well have taken place in informal ways; discussions may also have taken place about ways in which to improve; issues may have emerged through MDRs. Whatever the back story, the Capability Procedure allows for discussion to take place and recovery/improvement to happen informally before anything more formal has to be put in place.

## Capability and Disciplinary Processes

**It is important not to confuse a Capability process with a Disciplinary process.**

Principally *capability processes* are designed to help and support people to deal with poor performance before things become more serious and ensure that there is clarity about what is expected.

*Disciplinary processes* deal with issues of professional misconduct. The diocese is committed to resolving issues informally wherever possible. Where an initial complaint of such seriousness is received at the outset, then a CDM complaint will be brought immediately, following the Church of England's required process. See Section 11.2 for further details.

### 13.2 Capability Process

It is not possible to be good at everything! A process will always take account of an individual's many and varied gifts and qualities. Where an issue is a one-off or uncharacteristic, there may be no capability issue, but a member of Bishop's Staff may talk through with the individual what occurred in order to ensure that any practical or pastoral support is made available.

The principles underpinning the capability process include:

- The primary purpose is to find a way of helping the office holder to improve unsatisfactory performance.
- Proceedings will be carried out in accord with the requirements of natural justice.
- The right to be informed in advance, and in writing, of the nature of the performance issue, the procedure to be followed, and the possible actions that may be taken.
- The involvement of a panel, not an individual, at every formal stage.
- The requirement to take human resources advice.
- The right to be supported by a colleague or trade union representative.

- The right to respond to all points made.
- The right of appeal.
- The provision of appropriate pastoral support and care.

## Practical Issues

In determining ways forward in a capability process, an individual may require additional training, support, coaching or counselling, and the diocese will put in place what is reasonable in each set of circumstances in order to help the individual realise their full potential.

A capability issue may reflect a mismatch between the requirements of the role and the person doing it, in a specific situation. A capability process in one set of circumstances will not prejudice the individual in terms of them being more than capable of doing a job in another situation.

Worked through carefully, a capability process will ensure that an individual is clear:

- About the nature of the process, its stages, and who is involved.
- What the issues are and where it has been determined that they may have fallen short.
- What their Role Description and most recent MDR summary document and their broader professional codes of practice require of them.
- What is required in order for them to improve.
- What resources the diocese will make available to them (if applicable).
- What the timescales and expectations are.
- How decisions are made.
- About their rights throughout including representation or accompaniment, and appeals.
- About the expectation on them to actively participate in the process.

Examples where a capability process may be introduced include:

- Where there are issues of pastoral relationships breaking down.
- Where there are personality or style issues, e.g. an abrasive personality, or a style which persistently ignores the voices and concerns of churchwardens or local senior clergy such as a Team Rector or Rural Dean.

Issues may seem quite trivial or incidents seem small in themselves to an individual, but a capability process reflects a culmination or persistent pattern of behaviour, and the person designated to take up the process by the Bishop will set out the range of issues clearly at the start of any process.

## 14. Dignity in Ministry - Grievances

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### 14.1 Grievance Principles

The Archbishop's Council through the *Ecclesiastical Offices (Terms of Service) Regulations 2009* *Grievance Procedure Code of Practice made under Section 8 Ecclesiastical Offices (Terms of Service) Measure 2009* provides a Code of Practice and Supporting Advice for dealing with grievances. The grievance procedure is available to all office holders under Common Tenure and is intended to provide a means of addressing grievances relating to the exercise of the office held. Anyone dealing with a grievance raised by any person holding office under Common Tenure must have regard to the Code of Practice and Supporting Advice.

The underlying principles of the procedure are as follows:

- All grievances will be taken seriously and responded to fairly and quickly.
- Grievances will be dealt with informally wherever possible.
- Proceedings are confidential.
- The focus will be on issues not personalities.
- Account will be taken of the legitimate interests of all concerned.
- Office holders will have the right of representation by a colleague or trade union representative at any meeting.
- Grievances may be pursued without fear or sanction.
- Mediation and reconciliation are key themes in the process.

### 14.2 Grievance Procedures

#### Informal Procedure

It is hoped that issues can be resolved informally where possible and individuals are encouraged to pursue this avenue in the first instance. An office holder should discuss their grievance with the person responsible for the matters which have given rise to concern. If this is not appropriate or is unsuccessful, the office holder should raise the matter with the Rural Dean or another suitable person, to explore other ways of seeking a resolution and agreeing any remedial action. A written record should be retained.

#### Formal Procedure

If an informal approach proves incapable of resolving the grievance, or it has not been resolved within any agreed deadline, then the formal procedure may be invoked by the office holder. The Diocesan Director of People and Safeguarding will be involved at every stage of a formal procedure to monitor the situation on behalf of the diocese. Written records will be kept and retained at all stages.

**Stage 1** The office holder should set out their grievance in writing, including details of what steps have been taken to try and resolve the matter and what remedy they might find acceptable, and send their statement to the Archdeacon (unless the Archdeacon is already involved, in which case the matter should be referred to the Suffragan Bishop).

**Stage 2** The Archdeacon or Suffragan Bishop will either investigate themselves or may appoint someone else to investigate the matter on their behalf. The investigation will include obtaining a statement from any person against whom the grievance has been raised ('the respondent'). The investigator will invite the office holder to attend a meeting to discuss the grievance. The office holder may be accompanied by a colleague or trade union representative. If the grievance is directed at a respondent, that person or body should be invited to express a view, and that view must be taken into account at the meeting. The investigator will need to make a judgement as to whether the parties should be seen together at this stage (or whether bringing them together could inflame things). The respondent too has the right to be accompanied by a lay or ordained colleague. As soon as possible after the meeting, the Archdeacon or Suffragan Bishop will inform the office holder and respondent in writing of their decision as to whether there is substance in the matters raised in the statement of grievance and if so, what steps they are taking or propose to take to resolve the matter. The office holder will also be notified of their right to take the matter to stage three (within five working days of the date on which the decision was sent) if they are dissatisfied with the decision.

**Stage 3** If the office holder remains dissatisfied or the matter remains unresolved then they may move to appeal by informing the Archdeacon in writing stating their reasons for doing so. The office holder and respondent (and their union representative or other colleague) will be invited to a hearing with the Diocesan Bishop, or another senior member of the clergy or group appointed by him, to discuss the grievance. Procedure for that hearing is set out in Annex 5 of the Supporting Advice to the Grievance Procedure Code of Practice. The decision of the appeal body will be given in writing (usually within two weeks of the hearing) and is final.

## Guidance for Curates

The diocese is committed to training roles that offer the broadest high-quality opportunities for ministry development, each supported according to an individual's needs.

The Director of Ministry oversees the IME Phase 2 programme, which is delivered by the IME Phase 2 Officer. A Handbook for curates and training incumbents describes the programme and provides details of the training in each year as well as the assessment requirements and other procedures. IME Phase 2 is normally expected to last between three and four years.

### Statement of Particulars

Curates can be appointed on either a stipendiary or self-supporting ministry (SSM) basis. On appointment to a curacy post, individuals will have a clear Statement of Particulars that sets out the detail and arrangements for the role. All curacy posts are held under Qualified Common Tenure, which are time-limited posts. Under these terms, where a curacy needs to be extended (e.g. because of maternity leave), a revised training programme will be agreed by the IME 2 officer and a revised Statement of Particulars issued by the Archdeacon.

For those appointed on a SSM basis the Statement of Particulars will set out the detail and arrangements for that training role based on what is realistic for the individual's circumstances. The IME Phase 2 Officer will discuss with an individual their expectations in terms of training and formation. It is expected however that the SSM curate will still make every effort to attend IME events, learn and develop as time permits.

### Training, Development and Support

Training and ministerial development opportunities and ongoing reviews, supervision and guidance are part of the curacy arrangements. There may also be times when further specific training and support are required, when for example:

- An individual may be struggling in a particular area.
- Pastoral/local/domestic circumstances have changed.
- There are issues of disability or long-term sickness absence.
- During the fourth year of curacy, an individual has not secured a permanent role.

The diocese will do all that it can during these times to be sensitive and will work with the curate and the training incumbent to put into place additional support. Support will be tailored to individual circumstances but may include, for example:

- Health advice with occupational health support and guidance.
- Reasonable adjustment for a temporary or permanent disability.
- Specialist support for a particular aspect of ministry.
- One to one HR advice with pre-interview practices, support with CVs and interview skills.

## Appendix 1: Guidance for Curates, House for Duty and Self Supporting Ministers

If an issue does come up for which additional support and guidance may be appropriate, either the training incumbent or the curate themselves should contact the IME Phase 2 Officer in the first instance.

### Guidance for House for Duty Clergy

House for Duty clergy are normally licensed in the diocese as associate ministers together with a priest in charge. House for Duty clergy, priests in charge and authorised lay ministers' work together as a ministerial team in a cluster of parishes.

For each appointment, arrangements will be set out within three documents:

A **Statement of Particulars** referring to the terms under which the appointment is made issued by the Archdeacons at the outset of an appointment.

A **Role Description** relevant to the role to which the individual is appointed.

A **Profile/working agreement** which sets out the individual's responsibilities specific to the office held at the time of appointment.

House for Duty clergy are usually provided with a designated diocesan property, but can choose to live in their own property if this has been agreed between them and the Archdeacons.

All House for Duty clergy will be required to participate in any Ministerial Review processes; and CMD events.

Where administrative or other support is locally available/shared, the details of how this works will be clearly outlined at the beginning of an appointment, or if developed during an appointment will be updated within the Working Agreement.

The Church of England has provided guidance for House for Duty clergy.

### Commitments and Working Agreements

Whilst the amount of time will vary according to the individual circumstance, the usual expected commitment will be the equivalent of three days (including Sundays). The working agreement should specify on which days of the week under normal circumstances the priest is definitely on duty and on which days they are definitely off duty. A degree of flexibility will be desirable. For defined off-duty days there is no requirement for the priest to be in residence within the parish.

Within a Working Agreement an agreed monthly pattern should be set out. It may be necessary to consider modifying long established patterns of worship so as to suit the new situation. The agreement should indicate the extent of the responsibility of the House for Duty priest for the ordering and leading of services.

There is an expectation that the House for Duty clergy should attend specific meetings such as the PCC, benefice staff meetings, and Deanery Chapters. Other meetings can be agreed through the Working Agreement (such as Synods). Such meetings will be regarded as being within the priest's working week.

## **Appendix 1: Guidance for Curates, House for Duty and Self Supporting Ministers**

Where tasks and ministry is shared this must be clearly set out to help ensure clarity of role, boundaries etc.

### **Expenses and Fees**

Resettlement expenses (moving) at the outset of an office being taken up will be met in full by the diocese. Removal expenses at the end of a post where this is not to another ministerial post will be met by the individual.

All expenses relating to the work undertaken in the office should be reimbursed by the relevant PCCs as for all other clergy. The way in which telephone charges are reimbursed should be negotiated within the PCC/benefice.

Other information on fees can be found in the Bishop's Guidelines for Ordained Ministry.

### **Holidays and Time Off**

All clergy are encouraged to have proper time for family, friends, and refreshment. House for Duty clergy are entitled to the same holiday arrangements as stipendiary clergy pro rata, as appropriate. See Section 4 for further details.

The House for Duty priest must arrange holidays in collaboration with other clergy/the incumbent in the cluster/benefice. Churchwardens must be informed of any arrangements for cover. It is the responsibility of PCC(s) to pay any fees and travelling expenses incurred by covering ministers taking services.

### **Sickness and Absence**

The diocese has policies and processes in place to support clergy during critical illness, sickness and experiencing difficulties.

In the event of a period of ill health for seven days or longer, clergy should contact their Incumbent, Rural Dean and Archdeacon as soon as possible so that the diocese can see what support can be offered both pastorally and practically.

In the event of long-term sickness, some Occupational Health support and advice to clergy and their Incumbent, on how to gently return to working will also be available through the Archdeacon.

### **Opportunities for Continuing Ministerial Development**

All House for Duty clergy are expected to participate in Diocesan events and it should be recognised that any time given to this will be regarded as part of normal working week arrangements. Involvement in such activities will be supported financially by the diocese on the same basis as for an incumbent.

## Appendix 1: Guidance for Curates, House for Duty and Self Supporting Ministers

### Guidance for Self Supporting Ministers (SSMs)

Self-supporting clergy are those ministers who do not receive any stipend for their work. They may continue in their paid employment, be retired on a pension, or be financially supported by a partner or have independent means.

We offer the same training and qualifications to those who are self-supporting as those who work in stipendiary (salaried) posts.

At the outset of an appointment, arrangements will be set out within two documents, issued by the relevant Archdeacon:

A **Statement of Particulars** referring to the terms under which the appointment is made issued by the Archdeacons at the outset of an appointment.

A **Role Description** relevant to the role to which the individual is appointed.

A **Profile/working agreement** which sets out the individual's responsibilities specific to the office held at the time of appointment.

#### Commitments and Working Agreements

A copy of the working agreement should be held on file by the Archdeacon and shared with the incumbent, Rural Dean and Archdeacon. The agreement should be reviewed one year after taking up the appointment with the incumbent or Rural Dean.

Every situation will be different depending on the individual's circumstances and the Working Agreement will reflect this, being realistic about what can be offered by the priest in that situation to enable realistic expectations in the parish(es).

There is no expectation self-supporting clergy should attend specific meetings but where they are able this is encouraged – such as the PCC, benefice staff meetings, and Deanery Chapters. Other meetings can be agreed through the Working Agreement (such as Synods). Such meetings will be regarded as being within the priest's working week.

Where tasks and ministry is shared this must be clearly set out to help ensure clarity of role, boundaries etc.

Throughout the period of the office, the Archdeacon will ensure that each member of clergy (and their incumbent where appropriate) will have an up to date Working Agreement.

All SSM clergy are required to participate in all of the diocesan Ministerial Review and CMD events and processes that they are able to through their given individual circumstances, as agreed in their Working Agreement.

#### Family Friendly Policies and Guidelines

Whilst maternity leave and pay and other family friendly policies are not always appropriate to non-stipendiary clergy, the diocese will follow the spirit of such guidelines wherever practical. For information on time off for maternity, paternity, parental and caring situations and how these can be supported appropriately in parish settings, clergy should contact their incumbent where appropriate, Rural Dean or Archdeacon.

## **Appendix 1: Guidance for Curates, House for Duty and Self Supporting Ministers**

Any permanent changes to working arrangements should be agreed with the incumbent where appropriate, or Rural Dean or Archdeacon and documented in a revised Statement of Particulars and Working Agreement to be issued by the relevant Archdeacon.

### **Expenses and Fees**

Relevant information on fees can be found in the Bishop's Guidelines for Ordained Ministry.

### **Holidays and Time Off**

All office holders are encouraged to have proper time for family, friends, and refreshment. Self-supporting clergy should agree in advance with colleagues regarding their times of holiday or other leave.

### **Sickness and Absence**

In the event of a period of ill health for seven days or longer clergy should contact their Rural Dean and Archdeacon as soon as possible so that the diocese can see what support can be offered both pastorally and practically.

The diocese will support self-supporting clergy during longer periods of ill health by keeping communication lines open (where agreed with the individual) and offering the Churches' Ministerial Counselling Service (CMCS). See Section Clergy Wellbeing 8.3.

The diocese will work the SSM to secure a return to work by making reasonable adjustments, reducing their workload, undertaking the appropriate risk assessment, providing relevant coaching or training etc.

## Appendix 2: Diocese of Exeter Clergy Application Form for Special Leave

Diocese of Exeter - Application for Special Leave	
Name:	
Parish/Benefice:	
Archdeaconry:	
Date of Request:	
Anticipated time off required: Start date: End date:	
Number of days to be taken	
Date Archdeacon consulted:	
Date Bishop consulted:	
Bishop's / Archdeacon's Authorisation:	
<i>Office Use Only: Annual Leave recorded</i>	

In protracted periods of leave: any meetings during leave should be held on a regular basis and records kept below. The office-holder should be invited seek support and to keep in contact with parish and Diocesan developments.

Date of Meeting	Present at Meeting	Updates/Progress

This form can be completed in response to a telephone request. A copy of the form must be sent to the Archdeacon's PA who should be informed when the office-holder returns to work.

**Appendix 2: Diocese of Exeter Clergy Application Form for Special Leave**

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THE CHURCH  
OF ENGLAND  
IN DEVON

