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TERMS OF SERVICE

Stipend, Allowances, Grants and Other Benefits

Common Tenure

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 1 February 2011. Clergy and other office holders will continue to be appointed as incumbents, assistant curates, priests in charge and team vicars but will hold their office under Common Tenure. Under these new arrangements, a post may only be limited to a fixed term in certain specified circumstances e.g. for training posts or for those over 70. Those clergy who currently hold the freehold of their parish may choose to continue to do so until they resign, retire or move posts. Common tenure will confer additional rights to clergy.

Clergy not holding a freehold office at 1st February 2011, automatically transferred to Common Tenure with effect from 1st February 2011.

Common tenure will confer several **rights and obligations**. These are summarised below:

- ❖ 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 24 hours in any period of seven days;
- ❖ An entitlement to annual leave;
- ❖ 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 dependants in accordance with directions given by the Archbishops' Council as Central Stipends Authority;
- ❖ An entitlement to spend time on certain public duties 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 Diocesan Board of Finance will be the 'responsible body' for this purpose.

The legislation requires **all those 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', as now, 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.

Further details are available via the [Church of England website](#).

Freehold

Clergy who opted not to move onto Common Tenure will continue to hold the freehold of their parish(es) on all their existing terms, providing they remain in that particular office. However, freehold office may be brought to an end through reaching retirement age, ill health, after a breakdown of pastoral relationships, or through the effect of pastoral reorganisation as well as for disciplinary reasons. When the freeholder leaves the post/retires, this then becomes a common tenure post. Clergy with freehold may choose to opt into Common Tenure at any time.

The Bishop strongly encourages all clergy to participate in Ministerial Development Review (MDR) albeit this is optional for those with freehold.

Further details can be obtained from the Human Resources department at Church House Oxford.

Key Documents Regardless of the form of tenure

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;
- ❖ The licence/ deed of appointment;
- ❖ The role description (stipendiary clergy)/ ministerial working agreement (associate clergy)/ 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:

- ❖ [The Canons of the Church of England](#);

- ❖ [The Clergy Discipline Measure](#) (please follow related links on the dedicated website pages for all resources);
- ❖ 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;
- ❖ [Child protection and safeguarding](#).

Your Statement of Particulars (SoP)

All **clergy on common tenure** have the right to a **Statement of Particulars** within one month of the office holder taking up the post. This is a written document that confirms the obligations and rights of ecclesiastical office holders conferred to them by the Ecclesiastical Offices (Terms of Service) Measure and Regulations 2009, generally known as Common Tenure.

In other words, a Statement of Particulars sets out the terms and conditions on which the appointment is to be made, and will include (as appropriate for non-stipendiary and stipendiary clergy):

- ❖ Key information on your office, such as personal details and dates of appointment;
- ❖ The details of the entitlement to a stipend (including the amount or method of calculation), fees, and reimbursement of expenses as well as the right to a monthly stipend statement. When the stipend is payable;
- ❖ If the office post is full-time or part-time, and in the case of part-time posts, and of posts where special provisions have been made for hours of work, any terms and conditions relating to hours of work;
- ❖ Terms and conditions relating to rest periods and holidays (including annual holiday entitlement, Sundays on which leave may be taken, and the public and special leave days on which leave may not be taken);
- ❖ Terms and conditions relating to sickness absence, long-term absence or injury, including provision for sick pay;
- ❖ Pension provision;
- ❖ Statutory rights (including maternity, paternity, parental and adoption leave and time off work to care for dependants);
- ❖ Links to the processes, guidelines, and policies which underpin the roles and obligations of clergy within the diocese;
- ❖ Terms and conditions relating to an office holder occupying a house for 'better performance of his or her duties' including properties address and its owner;
- ❖ Length of notice the officeholder is required to give and if applicable receive if the appointment is terminated;
- ❖ For non-permanent appointments, the termination circumstances or if for a fixed term the end date.

For more information on what can be included on your [Statement of Particulars](#).

Here are some key points to remember about Statement of Particulars and related processes:

- ❖ It is required that all those on Common Tenure are issued with a Statement of Particulars document within one month of the appointment start date;
- ❖ Whenever a new appointment is made, regardless of whether the individual is coming into the diocese from another one or moving within the diocese a new Statement of Particulars will be issued;
- ❖ Any further changes to your SoP will be notified to you within one month of them coming into effect either by issuing a revised SoP or a letter detailing the change(s). An example of a change might be:
 - If there was a statutory change that required, an amendment to sick leave entitlement;
 - On a more individual basis, if you were provided with a house of residence for the better performance of your duties, it might be that you have agreed on a change in where you reside, and this would initiate a change in your SoP to update the details.

Any queries relating to the Statement should be discussed in the first instance with the appropriate Archdeacon, or with the Director of Human Resources.

Documents linked with the SoP

The SoP makes reference to this document you are reading now, and to your **role description** (for stipendiary clergy); your **ministerial working agreement** (for associate clergy) and **learning agreement** (for curates in training). These are documents that outline the key expectations, duties, and outcomes for an individual role. If you have more than one role you will have a role description and SoP for each role unless they are linked by design in which case it would be reasonable to have one SoP and one role description covering both roles.

Role descriptions/ministerial working agreements/learning agreements are not legal documents; however, it is very good practice to have them and they are encouraged across the diocese.

Our diocese is committed to ensuring that each member of the clergy has a role description/ ministerial working agreement or learning agreement. Initially, these will be developed in consultation with each clergy member, and through engagement with members of the PCC. Periodically they will be reviewed to ensure they are up to date and will be signed off by the archdeacon.

The Diocese has developed [role description guidance](#).

Guidance is provided for the ministerial working agreement for both [Self-Supporting Ministers \(SSMs\)](#) and [House for Duty \(HfD\)](#).

Each Archdeaconry has an Officer for self-supporting clergy who provides further support, facilitating the completion and review of ministerial working agreements. Your Archdeacon will be able to put you in touch with them.

Learning agreements for curates in training is already in place as part of the Initial Ministerial Education (IME) scheme. If you don't have a learning agreement already in place, then you may need to discuss the need for one with your training minister and use the [guidance notes](#) provided.

Your role description/ministerial working agreement/learning agreement will be a key document for you as it will guide your ministry on a day to day basis, as well as the longer-term development of your role. It will be a key document to refer to and bring along to your Ministerial Development Review (MDR) or the IME in the case of curates in training.

Hours of Work and Time Off

All clergy in our diocese are encouraged to take regular time off and holiday breaks for the benefit of their health. Time away from work and clerical responsibility is a vital factor in the wellbeing of those in ministry and their relationships with those close to them. Time for rest and re-creation is a biblical principle which should be at the heart of a ministry which models for others self-respect and a healthy way of working.

In a working day, proper time should be set aside for family responsibilities and relaxation with an overall aim of an average working week of up to 48 hours.

Clergy are, of course, expected to work flexibly because of the nature of the role, but should excessive hours become a norm and are regularly planned, it is advisable that you discuss this with your Archdeacon and in ministerial reviews or spiritual directions sessions so that you can be advised and guided appropriately.

The responsibility for ensuring leave and days off are taken lies with both the individual member of clergy and their parish. Parishes and those who are responsible in the setting in which clergy minister (e.g. PCCs, churchwardens, training incumbents) have a duty to enable clergy to take enough free time and to protect them from intrusion. This may involve the provision of another person to cover public worship, office time and administration. PCCs and other responsible bodies should review this provision annually. Meanwhile, incumbents should see that their assistant staff take the time off allocated.

If cover for services is a problem, a list of clergies willing to provide cover during holidays can be obtained from the Area Dean or the Bishop of Oxford's chaplain. They also have details of any fees and expenses that are payable to visiting clergy. Grant aid for holidays is available in certain circumstances, and application should be made to the Archdeacon.

The Ecclesiastical Offices (Terms of Service) Measure 2009 through its supporting Regulations [2009] and Directions [2010], conferred several rights and entitlements to clergy on Common Tenure in terms of rest period and time off. In summary, these are:

- ❖ An uninterrupted rest period of [24 hours] in each period of seven days;
- ❖ 36 working days annual leave for calendar year;
- ❖ Additional bank holidays or time off in lieu;
- ❖ Additional period of special leave granted by the Bishop in particular circumstances;
- ❖ Maternity, paternity, parental, adoption and shared parental leave;
- ❖ Request time off work, or adjustments to the duties of the office to care for dependants;
- ❖ Spend time on public duties.

Your Archdeacon is the key person to advise you on all aspects of time off.

Rest Period

As indicated above, it should be normal custom for full time clergy to work six days in a week allowing for a day off and to take six weeks' holiday each calendar year. Here are the provisions (including any relevant restrictions) and arrangements in more details:

- ❖ All clergy should take an uninterrupted period of at least 24 hours in every seven days;
- ❖ The weekly rest period may not be taken on a Sunday; on any of the principal Feasts of the Church of England, as set out in the Canons and Common Worship; on Ash Wednesday, or; on Good Friday;
- ❖ It is advisable that once a month, arrangements are made for clergy to take an uninterrupted rest period of 48 hours rather than 24 hours (this can be combination of two weekly rest periods together or a day annual leave attached to the rest period);
- ❖ Preferably a regular day in the week should be chosen, which should be known to parishioners.

Annual Leave

- ❖ The annual leave year runs from 1st January to 31st December;
- ❖ Your 36 days annual leave in each calendar year may include no more than six Sundays and time off after Christmas and Easter. This is in addition to your rest day;
- ❖ Annual leave may not be taken on any of the Principal Feasts of the Church of England, as set out in the Canons and Common Worship; on Ash Wednesday, or; on Good Friday;
- ❖ Unused annual leave may not be 'carried over' into the following year unless this has been agreed with the Archdeacon;
- ❖ If the appointment starts or ends part way through a calendar year the amount of leave days will be reduced accordingly;

- ❖ Part time clergy and licensed lay workers should take an appropriate proportion of the 36 days. The specific number of annual leave days should be detailed in their letters of appointment and/role descriptions/ministry working agreement or their Statement of Particulars;
- ❖ It is helpful that Area Deans and/ Incumbents are notified in advance when annual leave is being taken so that suitable arrangements can be made for cover. More than two weeks' notice would be advisable;
- ❖ It is advised you keep a personal record of annual leave taken.

Associate clergy will have the above entitlements agreed locally to suit their individual circumstances.

For further information on payment of stipend, leave entitlement taken around the time of leaving or changing posts, may be obtained by the HR & Stipend Administrator at Diocesan Church House.

Bank Holidays

All clergy are entitled to statutory bank holidays in addition to their annual leave entitlement. When it is not possible to take the actual bank holiday off (for instance, because it is a major festival) a day in lieu should be taken.

Stipend

For **all stipendiary clergy** – the body responsible for the payment of your stipend is the Oxford Diocesan Board of Finance (ODBF). It performs this responsibility through the Church Commissioners, who are not legally your employer, but they are responsible for paying a stipend to most clergy and licensed lay workers in parochial or diocesan appointments by monthly instalments paid into your 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 your post, in most cases the Diocesan Board of Finance. The diocese calculates your stipend 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. For current levels of stipend for different categories of clergy in the Diocese of Oxford please click on the [Stipends Letter](#).

MyView

The Church Commissioners payroll department has launched a new payroll self-service system for clergy 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. You can also view your personal details, amend your bank details and submit your Annual HLC Return using MyView. Further information relating to MyView – including a [User Guide](#).

If you have any questions about MyView, please email:
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 you to claim tax relief on the heating, lighting, cleaning and garden upkeep (HLC) costs of your 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 you can claim for your costs for the whole property, not just the work-related portion.

In order to qualify for the scheme, you 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) *{please notes 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};*
- ❖ Confirm an Annual Return each year.

The HLC allowance does not automatically apply to licensed lay workers, each case must be reviewed and approved by HMRC. If you are part-time or live in your own home you are also not eligible, however, 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.

Should you have any further queries about the HLC scheme or the Annual HLC Return in the first instance please refer to the [Clergy Payroll pages](#) on the Church of England website or

consult the HR & Stipends Administrator at Church House in Oxford (tel: 01865 208 204) or email pat.burton@oxford.anglican.org

Further information on when and how you are paid your stipend; your employment status; making statutory deductions in respect of PAYE tax and National Insurance please contact Clergy Payroll Services directly at clergy.payments@churchofengland.org (tel: 0207 898 1643) or by visiting [Clergy Payroll Services pages](#) on the Church of England website.

Tax Office

The tax office which deals with the Church Commissioners' payroll is HM Revenue and Customs at the Public Department 1 Office in Cardiff, HM Revenue & Customs, Public Department 1, Ty Glas Road, Llanishen, Cardiff, CF14 5XZ (03000 534720). If you do need professional help you should take it only from a suitably qualified person. Specialist clergy taxation services are available. Payment may be made to the clergy spouse for acting as receptionist, undertaking cleaning duties etc. This may be allowable against tax.

In the first instance please direct your enquiry to the [Clergy Payments department](#).

Another useful source introducing the complexities surrounding the particular tax position of stipendiary ministers is the Taxation of Ministers of Religion: A Rough Guide (August 2009) issued by the Churches' Legislation Advisory Service (Tel: 0207 222 1265; e-mail: info@clas.org.uk and [website](#)). The [full text](#) (scroll down to Taxation of Ministers of religion: a rough guide July 2009 word doc).

However, this is only a basic introduction and any minister who has doubt about any aspect of his or her tax affairs should seek advice from HMRC or from a professional adviser.

Parochial and Other Fees

Parochial fees also known as Statutory fees (as set by Parliament). Following the legislation relating to parochial fees undergoing an extensive revision by the General Synod in 2011. The Ecclesiastical Fees (Amendment) Measure 2011 made the following changes to the legal framework relating to parochial fees:

- ❖ Replacement of the incumbent's fee by a fee payable to the diocesan board of finance;
- ❖ Established a list of services and other matters in respect of which parochial fees may be prescribed;
- ❖ Archbishops' Council given power to prescribe fees (including increases) for a period of up to five years;

- ❖ Express power to prescribe what costs and expenses are included within the statutory fees.

The Guide to parochial fees published for the information of parochial clergy and parochial church councils. This has been updated to reflect the changes to fees that were made by the Parochial Fees and Scheduled Matters Amending Order 2014, made under the Ecclesiastical Fees Measure 1986 as amended by the Ecclesiastical Fees (Amendment) Measure 2011. The 2014 order came into effect from 1 January 2015. Clergy can receive two types of fees:

- ❖ **parochial fees** – these are fees for weddings, baptisms and funerals, burials of persons aged 16 years or more and monuments in Churchyards as identified by the current Parochial Fees Order made under the Ecclesiastical Fees Measure 1986 as inserted by the Ecclesiastical Fees (Amendment) measure 2011, and amended by the Parochial Fees and Scheduled Matters Amending Order 2014 and set out on the fees table;
- ❖ **DBF fees** – these parochial fees are now payable to the Diocesan Board of Finance. Under transitional arrangements from January 2013, some incumbents continue to be able to retain the DBF fees, providing they can satisfy three conditions, these are:
 - the incumbent of the benefice continues to hold their position on 1 July 2011;
 - the incumbent has not signed a Deed of Assignment of fees in favour of the DBF, and the incumbent gave written notice to the bishop of the diocese before 1 January 2010 that they wish to receive the DBF part of the fee whilst remaining in post;
- ❖ **“Extras”**- parochial fees do not include payment for “extras”. Parishes may decide to make an extra charge for items such as heating, the services of a verger, an organist, choir or bell-ringers, a sheet or recorded music that has to be specially purchased, the provision of recorded or taped music, taking films, video or sound recordings (where permitted), flowers and special furnishings. These fees are payable to the Parochial Church Council (PCC).

For more information on parochial fees, please refer to [A Guide to Church of England Parochial Fees](#).

Effective from 1 January 2015 parochial fees are now payable to the ODBF. This amount will be adjusted from the diocesan stipend provided. Below describes the way the Diocese of Oxford administer parochial fees.

Every quarter each parish is required to complete and submit the Parish Parochial Fees Quarterly Returns Form, together with the corresponding payment. Where no fees are due for the quarter, a nil return should be submitted. Payments and forms can be submitted either by paper returns and cheques or electronically. Click here for [specific details](#).

If a parochial fee is payable, the Diocesan Board of Finance part of the fee along with the Parochial Church Council part of the fee are legally payable to the DBF and PCC. If you need any further information please contact the Diocesan finance department at Church House (finance@oxford.anglican.org or 01865 208 206).

Fees for “Extras” and Special Services

This section explains the arrangements for payment of other fees and expenses to visiting clergy during holidays, vacancies, sickness cover and maternity leave in our diocese. All costs related to the payment of travel expenses incurred by visiting clergy are now the responsibility of the PCC (as would be in the case with an incumbent) and are no longer reimbursed by the diocese:

- ❖ **During clergy holidays**, the parish is responsible for fees and expenses;
- ❖ **In cases of clergy illness**, funds are available to help clergy. Please contact the HR & Stipends Administrator at Diocesan Church House;
- ❖ **During a vacancy**, fees and travelling expenses for statutory services are reimbursed by Diocesan Church House (claim forms are available from the HR & Stipends Administrator). If clergy are asked to do other pastoral work (e.g. school or sick visits, confirmation preparations, etc), it is expected that the parish will be responsible for expenses;-
- ❖ **During maternity/paternity leave**, the arrangements are the same as stated in cases of clergy illness as detailed above.

Where fees and expenses are the responsibility of the parish, we suggest that a cheque be left for the visiting clergy or sent to them the following week. This is particularly important in the case of retired clergy.

Retired Clergy, with Permission to Officiate (but not licenced), which includes ex-stipendiary clergy and ex-Self-Supporting Ministers (SSMs) but does not include Chaplains or Licensed Lay Ministers (LLMs) are entitled to retain two thirds of the Diocesan fee for weddings and funerals. All clergy covering services during a vacancy should be paid travel expenses only. The fee for occasional services taken by all other clergy must be paid to the Diocesan Board of Finance. There is no fee for a baptism service.

For up to date information on [all parochial fees](#) including the parochial fees table, parochial fees retired clergy and service in vacancy fees guidelines can be found here.

Alternatively, for further information on fees and the most up to date national current rates, please refer to [Church of England website pages](#).

Duration of Appointments (Termination and Extensions)

Termination of appointment

An officeholder is required to give not less than three months' written notice to resign from office, although this may be waived by agreement with the area 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 guilt 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 licence 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 licence in connection with a contract of employment and that contract is terminated; this, the term of office of the office holder is thereupon terminated.

Appointments held under Regulation 29

As set out in Regulation 29 posts held under Common Tenure may only be fixed term (or time limited) if the appointment is designated as one of the following:

- ❖ Covering authorised absence (e.g. maternity leave; sabbatical; absence from work) [Reg 29 (a)];
- ❖ Posts held by those aged over 70 and is occupying a post under a licence granted by the diocesan bishop;
- ❖ Training posts;
- ❖ Subject to sponsorship or local funding;
- ❖ Probationary posts;

- ❖ Posts covered by Bishop's Mission order (under the Dioceses Pastoral and Mission Measure, 2007);
- ❖ Posts designated as being held in conjunction with another office or employment;
- ❖ Where the post holder has limited leave to remain in the UK;
- ❖ A locally supported ministry post (for example, where a parish has agreed with the diocese that it will take on responsibility for funding an additional curate's post);
- ❖ A post may only be designated as a Locally Supported Ministry post if:
 - It is held by an assistant curate who is not in sole or principal charge of the parish in which he or she serves;
 - The PCC has entered into a legally binding agreement with the ODBF to meet all the costs, including stipend, expenses, pension, and housing;
 - The office holder, bishop, and PCC have all given their consent in writing.

For detailed provisions of the [measure and its regulations](#) and follow the links on the site.

In all cases of fixed-term or time limited appointments, the successful appointee will be clear from the outset of the reasons for this, their rights at the end of their appointment, and the dioceses responsibility. Clergy will not be treated less favourably than comparable permanent clergy on the grounds that they are only licensed on a fixed term basis unless this can be objectively justified. Good examples of such rights are:

- ❖ You will have the same opportunities in terms of access to support, training, and development;
- ❖ For stipendiary roles, the service is pensionable within the provisions of the Church of England Pension scheme.

It is therefore important that fixed-term or time limited are used appropriately; both the appointment letter and the Statements of Particulars will always set out the reasons for the post being fixed and have a specific end date.

Where a formal resignation is not required, clergy leaving the Diocese or moving to a differently remunerated office, should notify their area Bishops office who will complete a Movement form and pass it onto the area Archdeacon who will then circulate accordingly.

Review of the 'fixed term' Period

Prior to the end of an office held under fixed-term or time limited (usually 12 weeks), the Archdeacon will be in touch with the individual concerned to schedule a meeting to review the 'fixed term' period. Depending on the circumstances, the outcome may either be 'end of the fixed-term' or 'extend the fixed-term' period. In both scenarios, the Archdeacon has a supporting role to play.

Where the office is held under fixed-term or time limited because of Reg 29 (c) training post, the guidelines for completing the curacy will be followed. Please see the [Decision-Making Flow Chart \(End of Curacy\) process](#) within the Initial Ministerial Education (IME) scheme.

The qualifying period may be extended further for a period of one to two years maximum. Below we explain the ***reasons for extensions of curacy and advise on the process to be followed:***

- ❖ Ministry is exercised for fewer than 12 sessions per week for a continuous period of 17 weeks;
- ❖ A session is defined as a two-hour period and the working day is divided into five of these sessions. Sunday worship is included in the calculation of the sessions;
- ❖ A complete breakdown of the relationship between the curate and the training minister;
- ❖ A bullying and/or harassment case has been proven;
- ❖ Long term illness or an injury that causes long term illness for a period of no less than 3 months;
- ❖ A period of maternity/ paternity/ adoption leave;
- ❖ The 3-month period has been granted by the Bishop for the care of a dependant;
- ❖ Bereavement of a close family member;
- ❖ The outcome of a formal capability procedure;
- ❖ Unexpected pastoral reorganisation that has an impact on the parish itself or clergy roles;
- ❖ Unplanned departure or any long-term absence of the training minister;
- ❖ Any other reason determined as 'exceptional' and confirmed in writing by the Bishop.

It is advisable that a meeting between the individual concerned, training minister and the Director of the IME Part 2 is conducted. The recommendation for extension should come from the IME Officer to the Area Bishop. Where a fixed-term or time limited appointment is to be extended, this will be for a further defined period. Based on these recommendations, the Area Bishop will decide whether they ~~he~~ grant the extension and the dates for the extended period.

The Area Bishop may delegate the task of discussing and agreeing the 'extended period' to the Area Archdeacon, with the reasons and new date explained and agreed in writing.

To confirm any arrangement a revised Statement of Particulars (SoP) or a statement of change of the SoP will be issued by the Area Archdeacon.

Similar processes may be followed for reviewing 'fixed term' or 'time-limited' appointments falling under the other provisions of 'Regulation 29'.

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 [Interim Posts basic guidance](#) and the [Interim Posts supplementary advice](#) can both be located on the Church of England website.

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.

Grants

Ordination or licensing grant - the Diocese will pay a grant to those taking up an appointment for the first time after being ordained or licensed. The object of the grant is to help towards the cost of robes, theological books and other equipment that will be needed. The area Diocesan Director of Ordinance (DDO) will be able to advise you on this type of grant and how to access it. To find out who your Area DDO is, visit the [Staff List pages](#) of the Diocesan website.

First appointment grant - the Diocesan Board of Finance make grants to stipendiary clergy and licensed lay workers. A “first appointment” grant is payable when taking up a post of first responsibility. The purpose of the grant is to help towards the cost of robes, theological books, office and other equipment needed.

Resettlement grant – a resettlement grant is paid to assist with the expenses incurred which are incidental to a house move including alteration to or purchasing of furnishings.

Payment of these grants is made up to 6 weeks before the expected date of institution, ordination or licensing. This process happens automatically. Should you have any queries regarding first appointment or resettlement grants please contact HR & Stipends Administrator on (01865 208204 or pat.burton@oxford.anglican.org).

Birth or adoption of children – the Diocese will pay a grant to a parent in stipendiary ministry on the birth or adoption of a child, please contact your Archdeacon who will ensure payment. To find out who your Archdeacon is visit the [Staff List pages](#) of the Diocesan website.

Grants relating to maintenance of properties - the Glebe & Buildings Committee is a sub-committee of the Oxford Diocesan Board of Finance that sets the policy for acquisition, repair, maintenance and disposal of all parsonage houses, team vicarages and houses in the Board of Finance corporate ownership. It offers small grants relating to maintenance of properties. You need to contact the Director of Glebe and Buildings, Mr David Mason, on 01865 208230 to learn more about what is available.

Removals

The reasonable clergy cost of removal of normal household furniture and effects including insurance will be reimbursed on an appointment to a post in the Diocese from another in the Diocese or from Diocese in mainland Great Britain. Three removal quotations should be obtained, and the Archdeacon (or the Diocesan Secretary in emergencies) will normally authorise acceptance of the lowest of the quotations, although you are free to use whichever firm you choose. Removals outside of this area will be individually considered. Extraordinary items (e.g. antiques etc.) must be quoted separately.

Retirement

The Diocese will contribute £200 towards the legal costs of the purchase of a retirement home, providing this is done at the time of retirement or within the previous year. We will also pay the retiring person's removal costs to their retirement home within mainland Great Britain (in accordance with the removal expenses guidance detailed above), covering normal household furniture and effects. Removals to places outside this area will be dealt with on an individual basis. **Enquiries about removals expenses should be directed to the Archdeacon's PA in the relevant area.**

The current grant amounts can be found in the [Diocesan Stipends Letter](#).

Further information relating to [Retirement Housing](#).

Pensions

If you are holding a stipendiary office, your service is pensionable within the terms of the Church of England Funded Pensions Scheme. Please note that if you are holding your office on part-time basis, your pension entitlements will be proportionate to the level of stipend

you are receiving. The Church of England Pensions Schemes ('CEPS') were established for the purpose of providing pensions and associated benefits for clergy and others in the 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 your clergy pension, you should contact the Pensions Board at the Church Commissioners on 020 7898 1802 or pensions@churchofengland.org ideally three months prior to claiming, who 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, you can apply for a forecast of your state retirement pension [online](#).

You will not get your State Pension automatically - you must claim it. You should receive a letter no later than 2 months before you reach State Pension age, telling you what to do. If you do not receive an invitation letter, there are four ways you can make a claim. For details on ways to claim your State Pension, [visit](#).

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 [all schemes](#).

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

1. 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 us purchasing the remaining percentage, up to £150,000.
2. Rental properties – for those who don't have enough savings to buy a property through shared-ownership, you can rent a modest, unfurnished home under a tenancy agreement.
3. Supported housing – for those looking to live semi-independently. There are 7 schemes around the country.

Retired clergy and clergy widows

The pastoral care of all retired clergy and clergy widows is undertaken primarily by the area deans and the parish priests of the parishes where they live. In order to co-ordinate their care, it is the Area Bishop's responsibility to appoint a Retired Clergy Representative (RCR) and Clergy Widows Officers in their archdeaconry. Further details about your RCR can be found within the [guidelines for the ministry of retired clergy](#) document. Please refer to your Archdeacon for the contact details of your Clergy Widows Officer.

The Diocese of Oxford provides a residential preparation course for those approaching retirement and also a day course specifically about housing and finance. Information about these are available from the Deputy Director of Mission or you can discuss matters with your archdeaconry Retired Clergy Representative (RCR).

Other useful resources

The 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 is 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](#).

Death in service

If a member of the clergy dies in office, the relevant Bishop and Archdeacon should be informed, and contact should be made with the relevant Diocesan Widow/ers Officer (identified in the [Retired Clergy contacts](#)).

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 incumbent 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.

Childcare Costs

On 5 October 2018 HMRC closed the Childcare Voucher Scheme, in association with Edenred (the provider). This was a simple and tax efficient way of paying all or part of your childcare costs by enabling you to take part of your stipend in the form of an electronic childcare voucher issued free of tax and national insurance.

The government has introduced an alternative called Tax-Free Childcare. This is independent of payroll: you set up an account and every time you pay money in, the government will top it up by 20%.

Further details of both alternatives are available from the [Church Commissioners website](#).

Reimbursement of Expenses

All parochial clergy are entitled to the reimbursement of expenses reasonably incurred in connection with the exercise of their office. Reimbursement is the responsibility of the Parochial Church Council(s) (PCCs) of the parish(es) in which parochial clergy and other licensed and accredited staff serve. These sums do not form part of the stipend calculation, but the level of stipend presupposes full reimbursement of these expenses.

It is essential that at the very start of taking up an appointment an incumbent or assistant should discuss working expenses with the PCC by means of a consultation with the Churchwardens. It is suggested that agreement should be reached at such a meeting between the Churchwardens and the Minister (and the Incumbent too where an Assistant is involved), on those expenses to be paid directly by the PCC and those to be reimbursed. Procedures for monthly reimbursement and the claim form to be used should also be discussed.

Clergy should also regularly discuss with their PCCs the true costs of all expenses they incur. As a matter of good practice, clergy should retain all invoices and receipts relating to their

expenses. Where this is not possible, clergy should retain a written record of the cost they have incurred and the basis on which it is calculated.

Up to date rates for travelling, expenses are included in the annual stipend letter sent by the Diocesan Secretary which you will find in the Associated Documents.

The Archdeacons are available to give advice or to help with interpretation.

It is recommended that clergy avoid paying for items that are truly the PCC's liability and then seek reimbursement, as this can cause complications to their personal tax affairs. Items that may come under this heading include printing the parish magazine, repairs to or cleaning of church buildings, altar requisites, payments to organists and vergers. Providing all chargeable expenses are fully reimbursed, there will be no grounds on which to make a valid claim for a tax allowance.

Some clergy feel that the PCC should not be asked to reimburse the full cost of all their expenses, making the balance their own personal contribution to PCC funds. Should clergy wish to make a contribution to parochial funds in this way, it is recommended that clergy claim and be reimbursed for the full cost and then make a payment to the PCC via Gift Aid. Full declaration also avoids misunderstandings arising from the use of different figures on returns to the Diocesan Board of Finance, Church Commissioners and HM Revenue & Customs. Donating money back via Gift Aid or Payroll Giving is also more tax efficient than simply not claiming for expenses. **For tax purposes, full and accurate records should be kept of all working expenses received.**

Useful Information

The booklet entitled '[Parochial Expenses of the Clergy](#)' is a very extensive resource issued by the Central Stipends Authority (CSA). This document covers postage and stationery; telephone; computer equipment; administrative assistance; maintenance of robes; hospitality; locum; travelling – general, public transport and car; books; upkeep of the official house; payments to spouse or relative; in-service training, retreats and continuing ministerial development. It is written primarily with parochial clergy in mind, including but most of it is equally applicable to other clergy, deaconesses, lay workers and readers.

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. Further information and details of the products available can be found [here](#).

Working Families Tax Credits

Clergy families may qualify for Universal Credit a new benefit which has replaced six existing benefits and tax credits. If you are already receiving benefits under the old system, such as Working Tax Credit (WTC) and Child Tax Credit (CTC) you will continue to receive these benefits until you are transitioned over to Universal Credit.

Clergy are encouraged to contact the Working Families free legal advice service by email advice@workingfamilies.org.uk or on 0300 012 0312 for more advice. Alternatively, you can visit the [website](#).

Financial help

Several national charities exist to assist clergy and their dependents at time of need. For further information on these charities, you can visit the [Church of England website](#) located under the financial section.

There are no additional special benefits paid as of right to clergy in the Diocese of Oxford. However, the ODBF administers several small trust funds 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, national bodies maybe 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.

Data Protection

Although the diocese is not your employer, 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 General Data Protection Regulation (GDPR) sits alongside this act and tailors how the GDPR applies in the UK.

For detailed information on this very important issue, please contact the office of your area Bishop. You may also find the following links useful; the [National Church pages](#) dedicated to data protection and GDPR and the Diocese of Oxford pages dedicated to [General Data Protection Regulation for Parishes information](#).

Principles

The General Data Protection Regulation (GDPR) requires us to comply with several principles in relation to the personal data which are broadly like those of the Data Protection Act 1998. Data which we retain must be:

- ❖ Processed lawfully, fairly and in a transparent manner in relation to individuals ('lawfulness, fairness and transparency');
- ❖ Obtained for specified, explicit and legitimate purposes and not further processed in a manner incompatible with those purposes ('purpose limitation');
- ❖ Adequate, relevant and limited to what is necessary ('data minimisation');
- ❖ Accurate and kept up to date ('accuracy');
- ❖ Kept in a form for no longer than necessary ('storage limitation');
- ❖ Processed ensuring appropriate security ('integrity and confidentiality');
- ❖ The controller is responsible and able to demonstrate compliance ('accountability').

The key changes are:

- ❖ No principle for individuals' rights (dealt with separately in Chapter III of the GDPR);
- ❖ No principle for international transfer of personal data (dealt with separately in Chapter V of GDPR);
- ❖ A new accountability principle requires you to take responsibility for compliance by having processes and records in place.

Failure to comply with the GDPR principles may result in substantial fines.

Statement

The Bishop and his officers need to keep information about you for purposes connected with your office in the Diocese of Oxford. This includes your recruitment, financial matters relating to your stipend and other entitlements, ministerial development, retirement. The Bishop and his officers may also keep information on your health for purposes of compliance with health and safety regulations. More specifically, to consider how health affects your ability to carry out your duties; if you are disabled, whether you require any reasonable provisions to be made to assist you; and in relation to sick pay and any other related benefits.

All information provided by you will be stored on the Diocesan electronic database in accordance with the General Data Protection Regulation (GDPR). This is a password protected system that is accessible to and maintained by the approved individuals. For more information on the [Diocese of Oxford Privacy Policy](#).

As office holders, you may need to register separately with the Information Commissioner depending on the type of information you hold. The same may apply to local Parochial Church Councils (PCC), which are separate legal entities.

For more information on General Data Protection Regulation (GDPR), please visit the [Information Commissioner's Office \(ICO\) website](#).

