

ARCHBISHOPS' COUNCIL

DEPLOYMENT, REMUNERATION AND CONDITIONS OF SERVICE COMMITTEE

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Supporting the Ministry of Retired Clergy Index

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1 Foreword

The following guidelines are offered to enable the dioceses to formulate a policy for both the best use and the care of retired clergy, who play such a vital – and increasingly important - part in the Church’s ministry.

These guidelines draw on diocesan good practice and advice from the Retired Clergy Association following a survey of its members undertaken in 2003. I hope that they will help to promote a common code of good practice throughout the Church.

+ JOHN RIPON AND LEEDS

Chair of the Deployment, Remuneration and Conditions of Service Committee

April 2007

2 Definition

2.1 In these guidelines the term ‘retired clergy’ includes those who have retired from full-time stipendiary ministry and are in receipt of a clergy pension and non-stipendiary ministers who no longer hold a licence.

2.2 Some retired clergy are in posts that require them to have a licence, for example House-for-Duty posts (see paragraph 7.4 and following). Others are given Permission to Officiate when they retire.

3 Preparation for retirement

3.1 Retirement can involve an enormous change in the lives of clerics. They will often be moving to a smaller house, and will now be responsible for its upkeep. They may be leaving friends or social structures, or moving away from relatives. On retirement, many experience a sense of loss, similar to bereavement. This loss is felt by most people retiring from work, but, for clergy, there is an added dimension, because they remain ordained and usually feel a calling to continue to minister as a priest in some way. Of course, all Christians are called to minister throughout their life, and retired clergy have to consider what difference their ordination makes to this ministry, once they have retired. Retiring incumbents may also suffer from their loss of position or ‘status’: they were automatically leader of a ready made community, their congregation, and people looked to them as the ‘vicar’ for help.

3.2 Preparation for retirement, by individual clergy and by the diocese in which they serve, should start at least ten years before the likely date of retirement, partly because of the housing issues for those who live in a parsonage house.

3.3 Discussions about preparation for retirement might usefully be raised as a matter of course during ministerial review at age 55.

3.4 A pre-retirement pack should be distributed at age 55. The pack should include:

- a) A copy of this set of guidelines on the ministry of retired clergy;
- b) Current information from the Pensions Board, Archbishops' Council, Church Commissioners;
- c) Details of the Retired Clergy Association;
- d) The Ministry Division's *Guidelines for the Payment of Parochial and Casual Duty Fees*;
- e) The booklet *The Parochial Expenses of the Clergy: a Guide to their Reimbursement*, (which applies to clergy exercising a ministry in retirement); and
- f) Any other information provided by the Diocese.

Packs for stipendiary clergy should also contain:

- g) the Archbishops' Council booklet *Providing for Housing in Retirement*;
- h) details of how to seek *independent* financial advice via the Financial Services Authority <http://www.moneymadeclear.fsa.gov.uk> ; and www.unbiased.co.uk.
- i) details of retirement courses.

3.5 The pack should be offered again at age 60.

3.6 Dioceses should provide and arrange free retirement courses for stipendiary clerics and their spouses/civil partners. These can be arranged jointly with neighbouring dioceses. They should cover all the issues raised above, together with pensions, finance and health. Ideally, a course should be attended 18 – 12 months before the date of retirement and a follow up course attended 6 – 18 months after retirement.

3.7 At the time of retirement, the Area/Rural Dean and the Retirement Officer should ensure that appropriate arrangements are made for the parish to say farewell. The Bishop should meet retiring clerics (or write a personal letter) to thank them for their ministry. The diocese should give life membership (currently £30) of the Retired Clergy Association.

3.8 Some dioceses have found it useful to have a 'Retirement Panel' of suitably qualified recently retired clergy supported and commended by the Bishop. Two Panel members meet with each stipendiary cleric around the age of 55 and with each cleric (stipendiary and NSM) between three and one year before retirement. The discussion should include what they might do after retirement and the changes described in paragraph 3.1. In the case of stipendiary clerics, the discussion can flag up the need to consider arrangements for the provision for housing in retirement. The cleric can be directed to the Archbishops' Council's booklet *Providing for Housing in Retirement*; and given details of how to seek independent financial advice via the Financial Services Authority (see 3.4 (h) above). It is important for clergy to ensure that any financial advice obtained is properly independent and not provided by a body selling its own financial products. **Panel members may not, by law, offer financial advice nor direct any person to a particular financial adviser.** The Panel members encourage the cleric and spouse/civil partner to go on the retirement courses offered by the diocese.

4 Moving house

4.1 Incumbents and priests in charge are expected, and advised for their own sake, to move an appropriate distance from their last parish on retirement. This is to enable the new incumbent to develop their own new ministry without feeling inhibited by their predecessor and the parishioners to establish a relationship with their new incumbent.

4.2 Clergy are strongly recommended to take a six-month break immediately after retirement, and not to get involved in ministry or committed to other activities during this time.

4.3 The Archbishops' Council booklet *Providing for Housing in Retirement* gives details of CHARM (Church's Housing Assistance for the Retired Ministry) offered by the Church of England Pensions Board. If assistance is required, contact with the Board's Housing Department should be made at an early stage. It should be noted that retirement housing is not provided 'as of right'.

4.4 Once clergy have resigned their office, they have no legal entitlement to stay in the parsonage house. A period of time, usually up to a maximum of 3 months is often allowed. In cases of death in service, widows, widowers and civil partners have a legal right to remain in occupation of the house for up to 2 months.

4.5 If a cleric wishes to continue ministry, he or she will need either a licence or Permission to Officiate from the Diocesan Bishop (see below).

4.6 When a cleric moves to a different diocese on retirement, or subsequently, the sending diocese should, with the cleric's permission, notify the new diocese. The Bishop of the new diocese should write to the retired cleric to welcome them and the Bishop or Retirement Officer (see Section 5 and Appendix I) should meet the retired cleric and explain the procedures for them to exercise a ministry. The Pensions Board also issues lists of addresses every 6 months to retirement and widow(er)s officers, but retired clergy should not assume that these procedures always work; if they hear nothing from their new diocese, they should themselves take the initiative and contact the Bishop or a Retirement Officer if they so wish.

5 Retirement Officers

5.1 The pastoral care of retired clergy should be an important part of diocesan policy, and should include, separated/divorced spouses, widows, widowers and civil partners of deceased clergy.

5.2 Initial pastoral care should be the responsibility of the appropriate parish priest. This pastoral care is ultimately the responsibility of the Bishop who may appoint Retirement Officers to assist in meeting these responsibilities. A model job description is provided at Appendix I.

5.3 The Bishop should appoint both male and female Retirement Officers, at least one of whom should be ordained; the other could be a clergy spouse or widow(er). Any associated expenses should be fully reimbursed.

5.4 The Retirement Officers, in conjunction with the Area/Rural Dean, may appoint a 'Visitor' in each Deanery, who will undertake to keep in touch with retired clergy, including visiting them once a year (unless the retired cleric does not want this), and will keep details of their next of kin.

5.5 All cases of sickness, bereavement, financial or other needs, moments of celebration (e.g. milestone birthdays or anniversaries) etc should be referred by the parish clergy or the Area/Rural Dean to a Retirement Officer or Visitor, who should, depending on the level of response needed or pastoral care required, notify the Bishop or Archdeacon and suggest appropriate action.

5.6 The Retirement Officers should be conversant with the national, local and other clergy charities that may be able to offer grants and assistance in cases of hardship.

5.7 Retirement Officers or a Visitor should contact retired clergy soon after their arrival in the area, welcome them and explain the various networks, contacts, available grants, Synodical representation, Continuing Ministerial Education opportunities etc. They should also explain that any ministry in a parish or deanery must first be discussed with the Area/Rural Dean.

5.8 The Retirement Officers should organise an annual gathering for retired clergy (which may be linked to a service for bestowing and renewing Permissions To Officiate). Depending on the numbers and the geography, this could be for the whole diocese or for smaller areas and it could be a bishop's garden party in some years. Other social events may be organised depending on the interest.

5.9 The Retirement Officers should maintain close contacts with the Retired Clergy Association, usually through its Council members who are responsible for a specific area.

6 Widow and Widowers Officers

6.1 Under section 40 of Clergy Pensions Measure 1961, dioceses are required to have 'a diocesan widows and dependants committee' and to appoint 'an officer or officers' to report to that committee.

6.2 A model job description is provided at Appendix II.

7 The deployment of retired clergy

7.1 Ordination is for life. This is typified by the desire of many retired clergy to participate in the annual renewal of ordination vows.

7.2 Many retired clergy want to be active and are willing to offer their expertise in a supporting pastoral ministry, freed from some of the formal and administrative business of being a parish priest or sector minister. Retired clergy are a reservoir of theological, spiritual, counselling and other experience, available to the church, especially in the area of collaborative ministry. Dioceses are encouraged to make full use of this valuable resource, while recognising that it is always on a voluntary basis: no retired cleric should feel coerced.

7.3 There are a wide variety of ministries that a diocese could consider offering to retired clergy, particularly in areas under-resourced with clergy, such as low-income areas.

7.4 Ministries requiring a licence include:

- a) House for Duty posts;
- b) sole charge of a small parish;

- c) member of a Team Ministry (probably as an Honorary Assistant Curate but possibly as a Team Vicar) or of a ministry team that includes lay people;
- d) acting as an Area/Rural Dean; or
- e) part-time sector ministry (e.g. chaplain in a hospital, fire station, workplace, school, cadets etc).

7.5 Ministries which do not require a licence – and which often require Permission to Officiate - include:

- a) Casual duties and occasional offices;
- b) substituting (under the authority of the incumbent or the churchwardens and Area/Rural Dean, where relevant) during a vacancy, sabbatical, maternity leave or sick leave for a defined period of time;
- c) spiritual direction, mentoring or work consultation (e.g. a retired cleric with experience of Church Schools can be of considerable help to an incumbent coming new to this specialised area);
- d) conducting retreats or Quiet Days;
- e) acting as an outside consultant/teacher/facilitator for parishes (e.g. for PCC away days, stewardship campaigns, Lent groups and house groups);
- f) participating in missions, staffing CME and ordination courses, assisting with ministerial review;
- g) representing the diocese or the Church of England on various bodies or visits (e.g. an overseas diocese linked with the diocese, a Charity, or a secular organisation), and drafting papers.

7.6 There are many other things that a retired cleric can do, not directly connected with the diocese, depending on their interests, experience and skills. Many retired clergy write books, do voluntary work for Christian and other charities, work for missionary societies at home or abroad etc. Some do 'secular jobs' for the income and/or to 'get alongside people' and/or because they enjoy them.

7.7 Some retired clergy are understandably reluctant to volunteer for fear of being trapped or taken for granted. They should not be made to feel uncomfortable about this nor be coerced into taking on duties against their wishes.

7.8 All ministry should be supportive, enabling others to fulfil their own ministry. Retired clergy are most appreciated when they sensitively fill gaps that the existing team find it difficult to cover.

7.9 Retired clergy should never regard it as a right (or necessary to be true to their priestly ordination) that they should preach or preside at the Eucharist: the purpose of such ministry is to further the Kingdom rather than to make the retired feel they are valued.

7.10 There have been instances of bad practice, when retired clergy have conducted a number of funerals without the consent of the incumbent, or gathered a following of their own in a parish, or challenged the authority or leadership of the incumbent.

7.11 Ultimately the incumbent may decide what ministry, if any, a retired cleric should have in their parish and the retired cleric must respect this.

7.12 If a retired cleric finds him/herself at odds with the vision of their incumbent the Bishop (with the help of the Area/Rural Dean) should try to find a nearby parish where the retired cleric can minister harmoniously with another incumbent. If no such parish can be found, then the retired cleric should be told that their ministry can only be on an occasional basis. If the retired cleric continues to hamper the work of the local parish, the bishop should consider withdrawing their licence or the Permission to Officiate.

8 Licences and Permission to Officiate

8.1 'Permission to Officiate' from the Bishop, or a Licence, is required for any form of public ministry.

8.2 If a retired cleric is given an office or post of significant responsibility (including a House for Duty), they will need a licence.

8.3 A retired cleric wishing to exercise any public ministry who does not hold a licence will need to have been granted Permission to Officiate by the bishop of the diocese.

8.4 Permission to Officiate enables a cleric to officiate when **invited to do so** by an incumbent in the diocese in which the permission has been granted.

8.5 In some cases, Permission to Officiate is formally bestowed and renewed by the Bishop at an annual service for all retired clergy, in the cathedral or more locally and linked with a social event.

8.6 Legally, Permission to Officiate is held at the Bishop's pleasure and may be withdrawn at any time.

8.7 Before Permission to Officiate is granted, we recommend the following as good practice based on experience.

- a) The Area/Rural Dean and the incumbent should meet with retired clerics to welcome them to the deanery and to discuss how they may be able to contribute to its ministry. Appendix III is a form for asking the appropriate questions and recording the answers. If the retired cleric is interested in a diocesan ministry beyond the deanery, the diocese should be informed. If the retired cleric is willing to travel to parishes in neighbouring deaneries, the relevant Area/Rural Dean should be informed. A retired cleric should not minister in the parish where he or she has been the incumbent or priest in charge.
- b) The Area/Rural Dean or the incumbent should speak to at least two people who know the retired cleric and their past ministry, to get independent references.
- c) The diocese should conduct the required Criminal Record Bureau checks with reference to both child and vulnerable adult protection.
- d) The incumbent or the Area/Rural Dean and the retired cleric should clarify in a simple written agreement expectations on both sides to avoid misunderstandings, and deal with practicalities. This could cover: frequency of preaching; presiding at the Eucharist; involvement in the leadership of ministry teams; leading Lent courses etc; house groups; pastoral visiting; fees; expenses etc. When finalised,

the agreement could be countersigned by the Area/Rural Dean or the Archdeacon/Bishop as appropriate. The agreement should include the provision for at least quarterly meetings with the incumbent or the Area/Rural Dean, and for a review every two or three years.

- e) Retired clergy with Permission to Officiate should participate in Ministerial review, which should acknowledge the possibility that, with increasing age or diverging visions, it might be appropriate to find a mutually agreed way to reduce or even end the work of the retired cleric.

8.8 When there is a change of incumbent in a parish, this procedure should be repeated, with sensitivity. Often the retired cleric will have worked hard in the parish during the vacancy, and the new incumbent and Area Dean should acknowledge this. However, it is important to remember that those with Permission To Officiate may only do so at the invitation of the incumbent.

9 Conducting Public Worship

9.1 When invited to conduct public worship, clergy with Permission To Officiate should bear in mind the following.

- a) The worship should be consistent with the usual pattern and conduct of worship of that church.
- b) Care should be taken to respect the ministry of lay people and, where the laity is regularly involved in worship, this practice should be encouraged.
- c) Care should be taken particularly where Readers are concerned. Retired clergy should not assume that a request to conduct worship automatically involves preaching. In many churches, Readers regularly preach and are involved in the Ministry of the Word during the Eucharist, and they should not be denied this ministry simply because there is a visiting priest. When arranging the worship, it is important to be sensitive in enquiring whether a Reader will be preaching or performing a liturgical role during the service.
- d) If problems arise over the question of the President's role and the practice of the Reader, the rubrics should be followed

9.2 Apart from vacancies and emergencies, the request to conduct public worship should be issued by the incumbent. Those inviting retired clergy to conduct worship should ensure that they are fully informed by completing and sending to them the form in Appendix IV.

9.3 Normally it is the incumbent's responsibility to request help from retired clergy for conducting occasional offices (baptisms, weddings and funerals) and their associated visiting. When an individual or a funeral director makes a direct approach to a retired cleric, the retired cleric must seek the agreement of the incumbent of the appropriate benefice.

9.4 Some retired clergy may have a particular ministry to the bereaved; this could be recognised in an agreement with the incumbent, which makes it clear how it is to be integrated into the rest of the ministry of the parish or deanery. In some cases it will be possible to inform all the local funeral directors about such a retired cleric. See the Ministry Division's *Guidelines for the Payment of Parochial and Casual Duty Fees to retired clergy, non-stipendiary ministers and readers*.

10 Ministerial Review

10.1 All retired clergy who hold a licence should participate in any ministerial review scheme operated by the Diocese for Non-Stipendiary Ministers. It is desirable that retired clergy with Permission to Officiate should also participate in ministerial review.

11 Disciplinary Procedures

11.1 Retired clergy who are licence holders are subject to the Clergy Discipline Measure 2003. In the case of clergy with Permission to Officiate, the bishop has, if necessary, the option of simply terminating the Permission, although, in the case of serious misconduct, he might wish to pursue the Clergy Discipline Measure option so that a prohibition can be imposed.

12 Child and Adult Protection

12.1 The appropriate CRB checks must be carried out. See paragraph 8.7(c).

13 Representation

13.1 Retired clergy who are licensed to a parish have ex-officio membership of their PCC and Deanery Synod.

13.2 The Church Representation Rules were changed in 2004 (Membership of Deanery Synods Rule 24) to give a limited franchise to those with Permission To Officiate. Those with Permission To Officiate have the statutory right to elect one of their numbers, for every ten or less in a Deanery, onto the House of Clergy of the Deanery Synod, which may also co-opt those with Permission To Officiate. Those so elected or co-opted may vote and stand as candidates in Diocesan and General Synod elections.

13.3 There is an advantage in encouraging Deanery Synods to include those with Permission To Officiate, as those who are members of their Deanery Synods can both vote in the General Synod election and indeed stand for election themselves.

13.4 Retirement Officers should be co-opted onto Diocesan Synod.

13.5 Those with Permission To Officiate do not have an automatic right to be members of the Deanery Clergy Chapter, as it is not a synodical body. Practice may vary in different deaneries: some deaneries may have meetings for incumbents only; others may invite retired clergy to some or all of their meetings. Some deaneries have separate chapter meetings for retired clergy.

13.6 It is recommended that all deaneries, at least occasionally, have a meeting to which all with a Permission To Officiate or licence are invited.

13.7 A cleric who has Permission To Officiate in a parish may be authorised by the Bishop to act as chair of the PCC when the incumbent is absent and/or during a vacancy. Application for such authorisation must be made by the incumbent and PCC (or the PCC only if the benefice is vacant). A cleric who is so authorised is automatically a member of the PCC. Otherwise, any cleric, whether or not he has PTO, may be co-opted.

14 Communications

14.1 It is suggested that retired clergy should initially be sent all the diocesan mailings that are sent to licensed clergy, but not those that go to incumbents only. Retired clergy should be asked to respond positively if they wish to continue to receive any of these mailings.

15 Continuing Ministerial Education

15.1 Where possible, Continuing Ministerial Education should be open to retired clergy if they pay the normal fee.

15.2 Continuing Ministerial Education needs should be covered in ministerial review.

15.3 Continuing Ministerial Education courses should be free when required by ministerial review or particularly appropriate to someone's ministry.

16 Fees, expenses and other payments

16.1 The Ministry Division issued Guidelines for the payment of Parochial and Casual Duty Fees to retired clergy, non-stipendiary ministers and readers in February 1999.

16.2 The Guidelines are not mandatory, and dioceses have some flexibility in how they are applied. The Archbishops' Council has set up a Group to review the legislation on parochial fees, and the Guidelines will need adjustment in the light of any changes made following the review. It is expected that proposals will come the General Synod for discussion in 2008.

16.3 The Guidelines recommend the following:

- a) all expenses should be fully reimbursed;
- b) the motoring costs of retired clergy, non-stipendiary ministers and readers should be reimbursed at the same diocesan mileage rate as for the stipendiary clergy, unless exceptional local reasons make another rate appropriate;
- c) the casual duty fee for a Sunday (or weekday) service should be an amount equal to one half of the incumbent's fees for a funeral service in church (subject to a diocesan maximum for a number of services in one day);
- d) retired stipendiary clergy who have a licence or the bishop's permission to officiate should be offered:
 - a casual duty fee for a service in a benefice other than the one where they normally worship;
 - a casual duty fee for a service in a benefice where they normally worship, but only when the benefice is vacant;
 - a fee equal to two thirds of the incumbent's fee (with the balance of the fee going to the incumbent or Board of Finance, as appropriate) for an occasional office provided that the appropriate pastoral visiting before and after the office is undertaken by the retired clergy person.

16.4 Non-stipendiary ministers are not entitled to receive fees unless this has been specifically provided for in a job description.

16.5 All expenses of formal ministry by retired clergy, including pastoral visits for weddings, funerals and other reasons, should be reimbursed in full by the PCC or equivalent. Expenses should be the actual cost or mileage at the current rates of Approved Mileage Allowance Payments set by HM Revenue and Customs. Further details can be found in the Booklet *The Parochial Expenses of the Clergy: A Guide to their Reimbursement*

<http://www.cofe.anglican.org/lifeevents/ministry/workofmindiv/dracsc/parochialexpenses/>

16.6 Retired clergy should not normally receive expenses for attending a service in their usual place of worship.

16.7 As a result of a change in tax legislation, pensions in payment will no longer be reduced or suspended if a pensioner receives earnings from ecclesiastical office or employment.

17 The Age Limitation Measure 1975 and the Employment (Age) Equality Regulations 2006

(The Archbishop's Council's Deployment, Remuneration and Conditions of Service Committee issued Guidance on the implications of the Employment (Age) Equality Regulations 2006 in May 2006. What follows is an extract from that guidance.)

17.1 The Employment (Age) Equality Regulations 2006 give protection to paid office holders and employees against discrimination on the ground of age.

17.2 The regulations also extend, **to employees only**, a right to request working after their retirement age and the employer's duty to consider this request. This right does not apply to clergy who are officeholders.

17.3 The Ecclesiastical Offices (Age Limit) Measure 1975 requires the following officeholders to vacate their office at 70 years of age:-

- Archbishops
- Bishops
- Suffragan bishops
- Cathedral deans and residentiary canons
- Archdeacons
- Incumbents of benefices
- Vicars in a team ministry established under the Pastoral Measure 1968;
- Vicars of a guild church.

17.4 It may be assumed that these officeholders will work until 70 unless they indicate that they intend to retire before then. However, it is good practice to discuss this during ministerial review as the age of 65 is approached. Many clergy prefer to retire at 65 when they are entitled to receive their clergy pension.

17.5 Care should be taken in the treatment of a cleric whose post is not covered by the Age Limit Measure (e.g. a team rector or priest in charge on a fixed-term licence) who holds a time limited post that is coming up for renewal in his or her early or mid sixties. Obliging such a cleric to retire before the age of 70 by failing to renew his or her licence may be regarded as discrimination under the Employment Equality (Age) Regulations 2006 which came into force on 1 October 2006, unless there is a clear **Objective Justification** why that cleric should retire at a younger age than others doing similar work.

17.6 Advice should be sought from your diocesan registrar on the position regarding individual clergy.

17.7 Because the housing element may be regarded in law as remuneration, a house for duty priest is regarded as a paid office holder under the Employment Equality (Age) Regulations 2006.

17.8 If house for duty priests are allowed to work beyond 70, it could be claimed that other officeholders (who must vacate at 70) are being discriminated against unless there is an **Objective Justification** for that particular office being exercised by a priest over the age of 70.

17.9 Advice should be sought from the diocesan registrar on the implications of issuing of licences for house for duty posts that will run on beyond the age of 70.

18 Additional resources

Promoting a Safe Church: House of Bishops policy for safeguarding adults in the Church of England: CHP GS Misc 837

The Parochial Expenses of the Clergy: CSA Booklet, available from the Ministry Division

<http://www.cofe.anglican.org/lifeevents/ministry/workofmindiv/dracsc/parochialexpenses/>

A Guide to Church of England Parochial Fees: CC Booklet, available from the Ministry Division

Your Pensions Questions Answered: CEPB Guidance, available from the Pensions Board <http://www.cofe.anglican.org/about/cepb/>

Retired Clergy Association - Mr John Sansom - Kiggon Cottage , St Clement , Truro, Cornwall TR1 1TE. 01872 520471 johnandpauline@kiggoncottage.fsnet.co.uk

19 Appendices

Appendix I – Model Job Description for Retirement Officer

Appendix II – Clergy Widow and Widowers Officer

Appendix III Retired Clergy Confidential Questionnaire

Appendix IV - Sunday Service Information

Appendix I

Clergy Retirement Officer: Model Role Description

The pastoral care of the retired clergy and their spouses and civil partners is primarily the responsibility of the parish clergy: to assist them in this the Clergy Retirement Officer (CRO) shall provide good communication with the Bishop on behalf of the clergy, and with the Area Deans and the Pensions Board.

- 1 The CRO is directly responsible to the Bishop to whom he or she refers, as appropriate, news of sickness, bereavement, financial or other needs, as well as matters for celebration.
- 2 The CRO works with the Visitors as appointed by the Bishop, and will chair the Visitors' meeting in the absence of the Bishop.
- 3 The CRO shall encourage the work of the Retired Clergy Association.
- 4 Good links shall be maintained with the Pensions Board especially in the event of bereavement and changes of address. When there are queries re: housing or other matters, the CRO may need to liaise with the Pensions Board on behalf of the pensioner.
- 5 The CRO must work very closely with the Widows and Widowers Officer (for whom there is a separate role description: see Appendix II).
- 6 A full, regularly updated address list must be maintained of all clergy spouses and civil partners. These will include NSMs and OLMs who have reached pensionable age, retired from their paid employment, and relinquished the Bishop's licence. Separated and divorced spouses should be included. There are some clergy living outside the diocesan boundaries but with the Bishop's Permission To Officiate, and they also are on the list when they still minister within the diocese.
- 7 Changes in the address list should be communicated as they occur to the Bishop's Secretary and to the appropriate Visitor and Area Dean. Special vigilance needs to be kept for new arrivals from outside the diocese. Visitors and Area Deans will have a full update after the Pension Board list is received around the end of the year.
- 8 The CRO arranges for charitable grants to be paid clergy as they retire, for example for training and for clergy and widows in particular financial need, and should be familiar with what the Church Charities can offer.
- 9 The full working expenses of the CRO are paid by the Diocese.
- 10 Retired Clergy will be encouraged to register a next-of-kin address with the Bishop's office where it will be kept securely.

- 11 Retired Clergy will be enabled, if they would like, to communicate to Area Deans and others, through the “locum finder”, the gifts that they believe they still have to offer to the parishes, deaneries and diocese.
- 12 The CRO shall make the necessary arrangements for the annual Cathedral Eucharist and meal.
- 13 An address list will need to be provided when a tea party is organised by Bishop`s Lodge.
- 14 Retirement Officers should be co-opted onto the Diocesan Synod.

Appendix II

Clergy Widows and Widowers Officer: model role description

Under section 40 of the Clergy Pensions Measure 1961, dioceses are required to have a ‘diocesan widows and dependants committee’ and to appoint ‘an officer or officers’ to report to that Committee.

The primary care of the widows ,widowers and civil partners of deceased clergy is in the hands of the Incumbent. Area deans like to be kept informed of those living in their Deanery.

The Widow(er)s Officer has a particular responsibility in the early days of widow(er)hood to provide advice and guidance on pensions, housing, grant making charities and to offer such other general support as may be needed. (Detailed guidelines are provided by the Pensions Board.)

He/She ensures widow(er)s and civil partners are invited to the annual Eucharist and lunch at the Cathedral.

He/She should keep in occasional contact with all widow(er)s and civil partners and maintain an up to date list of their names and addresses from which he can keep Incumbents and Area Deans informed.

He/She administers grants made by the Diocese to widow(er)s and civil partners and makes recommendations to their Annual Meeting.

These job descriptions are based on material provided by the Liverpool CRO, the Revd John Burgess, in 2007.

Appendix III

The completion of this questionnaire is not compulsory

Diocese of Retired Clergy – Confidential Questionnaire

Data Protection Act

A copy of the information supplied on Part 1 of this form will be held by the Diocesan Board of Finance and used for the purposes of data processing, communication and information gathering and may be published in the publicly available Diocesan Directory. It will be shared within the structures of the Church of England within the diocese and nationally.

This information **will not** be published on the diocesan website without seeking further consent.

This information may be supplied to other bodies in the UK which we think may be of interest to you. If you **do not** want this to happen please tick here

Parts 2 to 3 of the form will be copied to the Rural Dean, Lay Chair, Clergy of your parish, the Bishop and the Archdeacon, and held by them for three years for their use with regard to their responsibilities of office.

Parts 2 to 3 of the form will not be copied to the DBF or other Diocesan Officers.

Signed.....

PART ONE

Name

Address

Tel No

E-mail

PART TWO

When did you retire?

When was your last post?

What were the main strengths of your pre-retirement ministry?

What level of involvement would you now wish to have in:

- a) Worship/Preaching
- b) Pastoral Care
- c) Occasional Offices
- d) Mission
- e) Specialist ministry and interests

PART THREE

What skills would you be willing to offer in the parish you live/worship in?

What expertise would you be willing to offer your deanery?

What skill/expertise would you be willing to offer to the Diocese?

What further training would be appreciated?

How many opportunities have you had in these areas and what ways might you wish your experience be used more effectively?

Interview undertaken by:

Date:

**Diocese of
SUNDAY SERVICE INFORMATION**

Church

Location of Church

Car Parking

Contact Name and Tel No

Service (Date and time)

Liturgical Colour Violet/White/Green/Red

Readings

Old Testament

New Testament

Gospel

Preacher Celebrant/Reader

Eucharistic Prayer

Is the Peace exchanged? Yes/No

Lord's Prayer Traditional/Modern

Lay Ministry

Lesson Readers (If yes state which readings) Yes/No

Intercessor Yes/No

Administration of Communion Assistance Yes/No

Participation by Readers in the Ministry of the Word Yes/No

Any other information