

## Appointments Process

The appointments process is triggered by:

- **Resignation:** must be written, with written acceptance by Diocesan Bishop; if also an Apokrisiarios also to Lambeth Palace, copying Bishop in Europe;
- **Retirement:** must be written, with written acceptance by Diocesan Bishop; if also an Apokrisiarios also to Lambeth Palace, copying Bishop in Europe;
- **Re-appointment** (a.k.a. **Transfer of Role [TOR]**): to another post in Diocese and date of licensing is arranged (following **resignation** letter being sent and also accepted by the Bishop before TOR takes place)
- **Revocation:** Diocesan Bishop revokes the licence
- **Expiry of licence** (at end of [extended] term, or in the absence of an age limit direction on the holder's 70<sup>th</sup> birthday) – Archdeacons need to monitor this
- **Removal from Office** under CDM or following a Capability Procedure
- **Death** in office

**NB:** Notice of resignation / retirement sent to the Pensions Board by AS.

NOTE: a resignation only becomes irrevocable when accepted in writing. Can be withdrawn if not accepted in writing.

Archdeacons (Ardns) ensure that the clergyperson writes to the Bishop in cases of resignation or retirement. Bishop responds copying in Appointments Secretary (AS) and Ardn. This information needs to be in writing; letters both received and accepted.

Acronyms in this document:

Ardn – Archdeacon  
AS – Appointments Secretary  
AD – Area Dean  
CC – Chaplaincy Council  
DS – Diocesan Secretary  
T&Cs – Terms & Conditions  
SoP – Statement of Particulars  
CRR – Church Representation Rules

	Action	Who?
<b>STAGE 1: Initial Communications &amp; Planning</b>		
a	Note the date of <b>Vacancy Day</b> , based on the Bishop's acceptance of a date	AS
b	<p><i>Only if chaplain has left their post</i>, on Vacancy Day +1 and at the request of the Ardn, AS informs the Chaplaincy Council Secretary officially of the vacancy and the date and sends them the <b>Vacancy Pack</b>. AS also sends the Vacancy pack to Ardns and the person with the customary right of presentation (may be the Bishop or another Patron). AS communicates the Lead for the process in the accompanying letter (Bishop or other Patron; the Bishop may delegate responsibilities to an Ardn).</p> <p>The vacancy pack contains:</p> <ul style="list-style-type: none"> <li>• Notes on locum priest support in vacancy</li> <li>• Template for the Vacancy Meeting</li> <li>• Template for the Chaplaincy profile, role description, person specification</li> <li>• Guidance on writing these</li> <li>• Financial questionnaire (insurance, pensions etc)</li> <li>• Clergy Remuneration Guide from handbook0</li> <li>• Country entry requirements</li> </ul>	AS
c	The Lead works with AS to set up an <b>appointments' timetable</b> , setting interim deadlines and bearing in mind a maximum of 2 interviews / month, none in August.	AS, Lead
<b>STAGE 2: The Preparation of the Recruitment Pack</b>		
a	The Lead works with the Chaplaincy Council [CC] to help them with the preparatory work for the Vacancy Meeting, which will determine most of the contents of the <b>Recruitment Pack</b> . There should be a written record of all these preparatory ('minor') meetings stating who was present and the main decisions taken. These meetings will normally concern the chaplaincy profile, role description, person specification as well as the financial questionnaire. Funding the recruitment process should also be agreed.	Lead, CC, DBF
b	If a CC wishes to have a meeting only of its members to discuss these matters, it may of course do so.	CC
c	The quorate* CC <u>must</u> gather for the <b>Vacancy Meeting</b> in accordance with Church Representation Rules [CRR] on due notice*. This meeting is normally to be chaired by the Lay Vice Chair, following the CRR (2020). Lead should be invited to the Vacancy meeting in an advisory capacity but does not have a vote. There is a template for this	CC

	<p>meeting that should be used to ensure everything required is voted on and the decisions recorded [in appendix]. At the meeting the CC must:</p> <ul style="list-style-type: none"> <li>• Approve the chaplaincy profile</li> <li>• Agree the role and person descriptions</li> <li>• Agree the Terms &amp; Conditions (T&amp;C)</li> <li>• Lead clarifies the status of the post (normally permanent; clear <u>Constitutional</u> grounds needed for a fixed/limited term or a transitional [interim] appointment)</li> <li>• Appoint the two lay representatives of the Council who will represent the Council during the remainder of the process</li> <li>• Agree the funding of the appointments process and the advertising strategy</li> </ul> <p>NB: candidates will be assessed against the criteria in the person description so unless something is included, it cannot be considered</p> <p>*CRR</p> <p>Notice period: M25 (10 clear days)</p> <p>Quorum: M27(1) and (2): 1/3 of its members, majority Lay (this is an <u>absolute minimum requirement</u>; a well-attended meeting is preferable by far)</p>	
d	<p>These documents (now referred to as the <b>Recruitment Pack</b>) are sent to the AS, who requests the Bishop's (or Archdeacon's) Statement outlining the wider needs of the Diocese / Archdeaconry.</p>	AS, Bishop (Ardn)
e	<p>AS, Lead and other stakeholders determine the remainder of the process, namely <b>finalise the dates for advertising, shortlisting, interview, possible commencement</b></p> <p>Typically, a timetable is known when the Vacancy Pack is sent to the Chaplaincy because the bishop's interview dates are fixed in advance, making it possible to fill in the possible dates for the rest of the process.</p>	AS, Lead (Ardn)
f	<p>The Recruitment Pack now contains the Bishop's (and/or Ardn's) Statement, Application Form, Confidential Declaration Form (CDF), and document with information on completing the application form for applicants.</p>	AS, Lead
<b>STAGE 3: Advertising the Post</b>		
a	<p>The Lead organises the <b>advertising</b>, which should be as wide as possible. The advert is added to the diocesan template (using logos) and shared with CoE <i>Pathways</i>, the diocesan website, and when the bishop is not the patron, the patron's website. <i>Church Times</i> advertising is used</p>	Lead, Finance Secretary, AS

	when the chaplaincy can afford it. It should go live everywhere on the same day, usually on the same Friday that it that goes live in the <i>Church Times</i> . The <i>Church Times</i> is paid for by the Chaplaincy through the Diocesan Finance Secretary.	
b	Adverts are <b>removed from websites</b> after closing date ( <i>Church Times</i> is automatic after 2 weeks)	Communications Team, Lead
<b>STAGE 4: Shortlisting, References, Invitation to Interview</b>		
a	Once the names are known for all applicants for a post, the list of names is sent to the bishop to check whether any of the names appear on the <b>Archbishops' List</b>	Bishop / Bishop's Chaplain
b	The Lead receives all the <b>application forms and CDFs</b> . If Lead is bishop, AS receives and sends to Ardn and Bishop; if Lead is not Bishop, Lead sends copies to AS for forwarding to Bishop and Ardn.	Lead, AS
c	<b>Details of applicants saved</b> in the correct format in the correct folders	AS
d	The Lead organises the <b>shortlisting</b> and informs the AS of the names shortlisted; good practice would suggest the whole interview panel is involved; if the panel is very large, a smaller group might be delegated this task; shortlisting is against the agreed documentation in the recruitment pack	Lead, panel
e	Episcopal <b>CCSL and reference requests</b> sent out	AS, Patron
f	<b>Interview timetable</b> prepared	AS, Ardn, Patron
g	Send <b>letters</b> to successful candidates inviting them to interview, Chaplaincy Reps inviting them to attend; and <i>if Ardn requests it</i> , AS sends out letters to unsuccessful candidates	AS
<b>STAGE 5: Interviews</b>		
a	<b>Documents sent to Interview Panel</b> ahead of interviews: <ul style="list-style-type: none"> <li>• Documents in the recruitment pack</li> <li>• Application forms (Sections 1-7 only)</li> <li>• Interview grid</li> <li>• Interview timetable</li> <li>• Equality and Diversity Statement</li> <li>• Guidelines for conducting interviews</li> </ul> These documents should all be <b>password protected</b> and panel members <b>must delete them all</b> after the end of the process. The full set is kept securely by the AS.	AS
b	<b>References, CDF, and CCSL</b> sent to Bishop only, ideally at least 3 days before the interview	AS
c	Where possible interviews should take place in the Chaplaincy and care should be taken to <b>ensure equality</b>	

	<b>of treatment of candidates.</b> The CC Reps should always be present. The Lead chairs the panel.	
d	<b>Interview day</b> typically includes: <ul style="list-style-type: none"> <li>• The interview</li> <li>• Presentations for all the candidates (and their spouses if present) about the context</li> <li>• A Q&amp;A session</li> <li>• Possible tour of the city / area</li> </ul>	Bishop, CC Reps, Ardn, Patron if not the Bishop
e	<b>Appointee</b> selected after deliberation and discussion; When Lead is the Bishop, AS informed; when Lead is another Patron, Patron sends a nomination letter to the bishop, who interviews the candidate, before deciding whether to accept the nomination.	Lead, Bishop, AS
f	If accepted, the bishop sends a <b>Provisional Offer Letter</b> confirming the bishop's willingness to appoint (subject to fulfilling the required conditions / the satisfactory completion of the necessary procedures); this includes an invitation to attend the <b>Confidential Visit</b>	Bishop
g	<b>Diocesan Safeguarding Team</b> informed by AS so that the necessary checks can be completed	AS, DST
g	Unsuccessful candidates informed by letter Sometimes Ardn might carry out this task and inform the AS	AS
h	<b>If no one is appointed</b> , the Lead may return to the CC to reconsider advertising or other aspects of the process / recruitment pack. The process re-starts from the relevant stage to be determined by the Lead working with the reps	Lead, CC
<b>STAGE 6: The Confidential Visit through to Official Offer</b>		
a	<b>Date of Confidential Visit agreed</b> ; AS informed	Ardn
b	T&Cs are based on Vacancy Meeting decisions and pro forma; they are drafted ahead of the visit (Zoom, email) and the draft <b>must be seen and approved by the Diocesan Secretary and Ardn</b> before they can be signed at or following the Confidential Visit	Appointee, Churchwardens, Ardn, DS
c	The purpose of the Confidential Visit is <b>to visit the chaplaincy</b> , including potential accommodation, particularly when the interview did not take place at the chaplaincy. The appointee might meet appropriate members of the community (e.g. clergy colleagues, other members of the CC, other significant stakeholders) although at this stage <b>confidentiality must be maintained</b> . If agreed and approved, the T&Cs can be signed. If not, they should be signed as soon as they are	Churchwardens, Appointee

	ready. If after approval by the DS and Ardn it is desirable to change something in the T&Cs, the amended version should be seen by both the DS and Ardn prior to signing by the churchwardens and appointee.	
d	Copy of the <b>final, signed T&amp;Cs</b> and signed <b>Confirmation of Agreement to Appointment sent</b> to Diocesan Secretary and his/her PA and to the AS by the Churchwardens	Churchwardens, Diocesan Secretary, AS
e	After the visit, the Appointee should write to the bishop stating their willingness to be licensed	Appointee
f	<b>Certificate of medical fitness</b> submitted by appointee directly to THRIVE, who sends the certificate to the AS and copy the appointee as well	Appointee, THRIVE
g	AS uses T&Cs to prepare <b>Statement of Particulars (SoP)</b> , which the Bishop checks. [The SoP is a notice to the minister concerned. It is not contractual and should not be treated as such. It should, therefore, be signed by or on behalf of the Bishop before it is issued.] Copy with Bishop's signature is <b>sent to appointee</b> .	AS, appointee, Bishop
h	Documents needed from / about appointee, to be filed in the <b>Episcopal (Blue) File</b> : <ul style="list-style-type: none"> <li>• Letter to the Bishop</li> <li>• Confirmation of Agreement to Appointment</li> <li>• Signed T&amp;Cs</li> <li>• Signed SoP</li> <li>• Safeguarding DBS check</li> <li>• Safeguarding C2 training</li> <li>• Letters of Orders / evidence of ordination</li> <li>• Medical certificate (THRIVE)</li> <li>• ABC PTO (OPTO)</li> <li>• National Insurance Number if joining CEFPS</li> <li>• Letter of Appointment sent by the Bishop (copy)</li> </ul>	AS, Bishop's Chaplain
i	AS works with Ardn (Patron) and Appointee to determine dates of "local announcements" (i.e. in the sending and receiving churches and on social media / online) and licensing date. AS sends Notice of Appointment (NOA) to usual distribution list, locum administrator, and Comms Team. Date when confidentiality ends (when appointment may be known publicly) to be included in NOA. When licensing date is agreed, a draft <b>Appointment Letter</b> is sent to the Bishop for personalisation and signature; licensing date should <u>not be set less than 4 weeks after</u> the issue of the NOA.	Ardn (Patron), DS, Comms Team AS, Bishop
j	Appointment Letter which includes the <b>start date and the safeguarding renewal date</b> is sent to Appointee, copies to Churchwardens, Ardn, Patron	AS

<b>STAGE 7: Announcements and Licensing</b>		
a	Registry reviews the information in the NOA and clarifies with AS where necessary	Registry, AS
b	Registrar prepares and issues the relevant documents for licensing	Registry
c	Registry circulates an electronic copy of the documentation to the Bishop or Commissary, the Bishop's Chaplain, the AS, Gail Wilmet and Bron Panter	Registry
d	The <b>Formal Announcement</b> is prepared for wide circulation and circulated (e.g. Church Times for appointments section, Pensions Board etc)	AS
e	Appointee <b>profile on CMS</b> completed	AS
f	<i>If applicable:</i> <b>CEFPS application documents</b> completed and sent to Pensions Board	AS
g	Documents printed and transferred to the Episcopal File	AS, Bishop's Chaplain
h	Licensing <b>may only proceed using the original sealed engrossment</b> issued by the Registry	
i	Licensing and celebrations Optional: send photos to Communications Team with short write-up (action by someone from Chaplaincy)	Bishop, Ardn, Area Dean, Chaplaincy, guests
j	<b>Signed Declaration and Oaths</b> need to be sent to the Registrar by the Bishop or the Commissary	Bishop or Commissary
k	Where licensing was undertaken by a commissary, the Registry sends a copy of the signed declaration and oaths to the Bishop's office by email	Registry
<b>STAGE 8: After Licensing</b>		
a	Archdeacon to-do list after licensing: <ul style="list-style-type: none"> <li>Put date 3 months before chaplain's 70<sup>th</sup> birthday in the diary (trigger age direction work)</li> <li>Put date 3 months before expiry of a fixed or limited term license in the diary (time to organise an extension or manage departure)</li> <li>Check in with reps 3 months after licensing to see how things are going</li> </ul>	Ardn
b	Care for the newly appointed clergyperson: <ul style="list-style-type: none"> <li>If a woman, the Dean of Women's Ministry makes contact and informs them of support networks available</li> <li>Check-in from Area Dean and/or Archdeacon in the first two months</li> <li>Inform clergy of training opportunities, and set date for first MDR</li> <li>Induction for clergy new to the Diocese</li> </ul>	Dean for Women's Ministry; Ardn / AD; Head of CMD

c	Care for the Chaplaincy: Possibility of a questionnaire to ask lay reps about their experience of the process	Ardn
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