



## **INFORMATION**

**for**

**STIPENDIARY CLERGY,  
ACCREDITED LAY WORKERS AND  
THEIR FAMILIES**

**April 2010**

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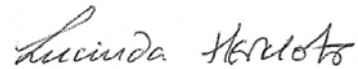
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## FOREWORD

This booklet is full of useful information particularly for clergy living in clergy housing. It deals with all sorts of issues, so please keep it by you to consult during the year.

Would you please direct any enquiries to Mrs Carolyn Cropp in the first instance, who has day to day responsibility for the financial care of the clergy.

A handwritten signature in cursive script that reads "Lucinda Herklots".

Lucinda Herklots  
April 2010

## THE HOUSE

### **Your home**

The house you have been provided with is your home, and is the centre of your family life. How much you open it up for the parish is up to you as a family to decide. Doubtless this will depend on parish facilities, the age of your children and your commitments. Do not feel obliged to do as your predecessors have done.

The provision and care of most clergy houses is the responsibility of the Diocesan Board of Finance. All enquiries should be addressed to the Property Department at the Diocesan Office (01722 411933)

### **Organisation and Policy**

There is a committee for each Archdeaconry, which normally meets at bi-monthly intervals. This is chaired by the Archdeacon and consists of representative clergy and laity (including clergy spouses), who have knowledge of and concern for clergy housing in their area. The name/s of your local member/s can be obtained from the Property Secretary and you are encouraged to discuss your concerns with them.

### **Moving in**

After accepting the appointment you will have an opportunity to raise with the Diocesan Surveyor and Churchwardens, any minor repairs, internal decorations and small improvements such as electric sockets.

Curtain rails and light fittings normally belong to the house and so should have been left for you (and subsequently need to be left for your successor).

The Diocese will arrange regular servicing of the central heating system and gas appliances under central contracts. All faults should be reported to the authorised contractor. The Board will not pay accounts from any other firm. It does not provide furniture, curtains and stair or first floor carpets. Any carpets and curtains or fuel you inherit, or leave behind for your successors, will be subject to an arrangement (if any) among successive occupants and possibly the churchwardens; the Diocese is not involved.

**Removal and Resettlement Grants:** see under '**Money**'.

### **Repairs and improvements**

The Diocese maintains the fabric of the house and the utilities. The Diocese is also responsible for improvements to the house, and the Archdeaconry Property Committees have a systematic programme of up-grading; it is prepared to consider requests for essential improvements for inclusion in its annual budget.

### **Quinquennial Surveys**

These are carried out by the Diocesan Surveyor, and essential repairs and external redecoration are carried out to maintain the property in good order. If there is need for urgent interim repairs between surveys, details should be submitted to the Property Secretary, and no work should be put in hand without prior authorisation, except in an emergency when he should be contacted as soon as possible.

No alterations may be made to houses without consulting the Property Committee. If occupiers wish to make improvements at their own expense details should be submitted to the Property Secretary.

### **In emergency**

Although generally no repairs should be put in hand unless cleared with the Property Secretary, in emergency or out of hours, contractors may be instructed by the occupants to carry out emergency repairs, particularly where there is a danger to life or to the fabric of the house by, for example, electrical or plumbing emergencies.

### **Internal Decorating**

This is the responsibility of the occupier, and it is suggested that a programme of gradual redecoration (say two rooms per year) will enable the interior of the house to be kept up to standard. Upon vacation, houses are expected to be left in reasonable decorative order. It is the policy of the Board (subject to available funds) to offer a grant towards reasonable materials while leaving the occupier of the house responsible for finding the labour. It is increasingly being found that PCCs are accepting this responsibility by either paying for the labour or carrying out the work on a parish DIY basis. A vacancy is an appropriate time for any major redecoration to be carried out. Please refer to the separate leaflet on the terms of the material grant. The Diocese holds a Personal Accident Policy for all parish volunteers working in a parsonage house or a Diocesan-owned Assistant Staff house. Details of any accident should be notified to the Property Secretary without delay.

### **Household bills**

Water rates are paid by the Diocese. Particular care should be taken not to waste water, especially as many of our houses are on metered water. Some of your lighting, heating, cleaning and garden expenses may be allowable against income tax. A proportion of the telephone bills can be negotiated with the PCC as part of clergy working expenses. Council Tax for Diocesan houses is paid directly by the Diocese. Any correspondence received from the District Council should be sent to the Property Secretary unanswered. The Board is entitled to a 25% Council Tax discount for any house with a single occupier. Where this discount is lost because the householder is taking in a rent-paying lodger, equivalent reimbursement must be made by the householder to the Board.

### **Insurance**

Your house is insured by the Diocese with: Ecclesiastical Insurance Group (EIG).

Damage as a result of frost, accidental breakage, storm, flood, theft, impact or vandalism should be reported to the Property Secretary **within 15 days**, with full details of how and when the incident occurred. Remedial work can be claimed on the Insurance Policy and invoices can be sent to him accordingly. Avoidable damage by the household cannot be paid for by the Board unless a claim is accepted by the Insurance Company.

If you have matters that you believe might lead to an insurance claim, the Diocesan Office should be notified immediately.

You are responsible for insuring your contents, including any greenhouses and sheds that you may install, and for third party liability (excluding property covered by the Diocese). Clergy should take steps to ensure that escape of central heating oil is covered under the terms of their contents insurance policy to avoid financial loss in the event of undetected rusting out of the oil tank.

### **Other Maintenance Responsibilities**

Garden sheds and greenhouses are your responsibility to maintain. Cookers, hobs, fridges, freezers, dishwashers and washing machines are also your responsibility to provide, replace and maintain, even if they were provided in your property when you moved in. A cooker grant is available in certain circumstances – see separate leaflet. The parsonage is your home and you are expected to undertake minor repairs and maintenance and report any defects that appear dangerous or cause damage to the house as soon as possible, and to keep it in good condition. In particular, you should ventilate and heat your house sufficiently to avoid condensation and damage to the building or to the health of you and your family. If sprinklers or unattended hosepipes are to be used the householder should notify the Water Authority and must pay all charges arising.

### **Wood Burning Stoves**

The responsibility for keeping chimneys properly swept lies with the occupier. Wood burning stoves can cause problems in chimney breasts etc., and may not be installed without authorisation. The Diocesan Surveyor will be glad to advise on this or other such technical matters.

**Pests**

The Occupier is responsible for dealing with bees, wasps and mice. Rat infestation will be dealt with by the Board on notification to the Property Secretary.

**Fire**

It is a good idea to have a fire extinguisher in your home. You are strongly advised to purchase at least one. The Diocesan Property Department has installed smoke detectors in all houses. If yours does not have one please advise the Diocesan Surveyor immediately. It is your responsibility to ensure that batteries are fitted and replaced at yearly intervals (if the detector is not connected to the mains electricity supply) and that detectors are tested regularly.

**Security**

The Property Committee will consider requests for improved locks, lighting and other security measures.

**Assistant Staff houses**

These may be the property of the Diocese or the parish, or each may own a proportion. If the former, then the care is as for the parsonage house; if the parish, then the parish is responsible and will arrange the insurance of the house, exterior maintenance, water and rates. Problems and expenses should be discussed with the Churchwardens. In case of difficulty, please consult your Archdeacon.

**Listed houses**

Where a house is listed as of historic or architectural interest, its internal fittings are not to be changed or modified in any way without prior reference to the Diocesan Surveyor.

**Sub-letting**

You should not sub-let any part of the parsonage house in any circumstances without consulting the Property Secretary.

**During a Vacancy**

The Board will continue to be responsible for insurance, water rates, Council Tax, outside decoration and major repairs. However, your attention is drawn to the following:

(a) **Central Heating:** Churchwardens are expected to arrange for the entire central heating and plumbing systems to be drained down unless otherwise advised by the Diocesan Surveyor for a particular reason. The Board will pay any essential plumbers accounts for such work. Frost damage in vacant houses cannot be recovered under the Insurance Policy. PCCs may run the central heating during a vacancy as long as they are prepared to pay the running costs and to take responsibility for any subsequent damage if the system fails.

(b) **Electricity/Gas:** These supplies must be turned off. Quarterly standing charges may be forwarded to the Diocesan Property Department.

(c) **Telephone:** The account for the outgoing occupier should be closed. The service should be transferred into the name of the PCC and, unless the telephone is to be used by the parish, a stop put on outgoing calls. This will preserve the line and number for the next occupier. Standing rental charges can be recovered from the Property Department but not reconnection charges should the line or number be lost. In some areas BT has other arrangements for preserving the line and number, and will advise when contacted.

(d) **Security:** Please advise the Property Department of the name, address and telephone number of the keyholder/s. Someone from the parish should walk around the house and property in general at least three times a week to check that the building is secure and that there has been no unauthorised access. No temporary occupation of the house should be arranged without Diocesan permission.

(e) **Garden:** The Property Department will pay for essential upkeep which should amount to no more than cutting the lawn and treating drives and paths with weedkiller. If you incur expenses for such work the account can be sent to the Property Secretary, who should be consulted in advance if the garden seems to be in need of very major attention.

**Costs**

The cost of maintaining our Clergy Houses absorbs a large proportion of the Diocesan Budget. Anything Clergy and PCCs can do to keep down such expenditure will be in their own interests.

**Further Details**

This is only a summary. Full details will be found in our Property Department's Housing leaflets pack, which you should have received. If you have any further queries or require advice on matters relating to your house please contact the Property Department at the Diocesan Office.

## **MONEY**

### **On moving in**

Expenses of removal within the United Kingdom for full-time clergy and licensed lay workers arriving in the Diocese or moving to a new post within the Diocese are paid by the Board of Finance. Three quotes should be obtained, without transit insurance. It is at the discretion of the individual as to which three firms are invited to quote. The Diocese has a corporate account facility with Pickfords, who may be contacted via their Head Office on 0800 212155 quoting a/c No. 000C4489. The lowest quote may be accepted, copies of all three quotes should be sent to the Diocesan Office for DBF records and the invoice from the removals firm sent direct to the Diocesan Office for payment.

You will also qualify for the Resettlement Grant, intended for carpets etc., and this is paid about a month before licensing. If appropriate the First Appointment Grant is paid around the time of the licensing. Both are paid according to a national scale. Current rates are shown in Appendix 4. Ordinands will receive both grants 7 weeks before first licensing. If the appointment is not taken up, then the grants become immediately repayable.

### **Stipend**

The Diocesan Stipend - also shown in Appendix 4 - is paid through the Church Commissioners. The Church Commissioners' leaflet, 'Your Stipend – what you need to know', explains the make-up. There is no reduction of stipend for clergy in receipt of state retirement pension.

Statutory Maternity Pay, Paternity Pay or Adoption Pay: The Diocese follows the Church's national guidelines in these matters. Please contact the Stipends Secretary at the Diocesan Office for detailed information.

### **Parochial fees**

Local fees for funerals and weddings etc. form a part of the stipend, but it is possible for a priest of incumbent status to complete a Deed of Assignment by which he or she is paid the full stipend by the Diocese and undertakes to send his/her fees on a regular basis to the Diocesan Board of Finance. Assigning fees ensures you get a regular cash flow, and is strongly recommended. When fees are assigned, the assignor remains responsible for ensuring that they are remitted to the Diocese even if, in practice, the fees are handled by the PCC treasurer. During a vacancy, fees which would otherwise be passed to the incumbent, should be sent to the Diocesan Office. Whether or not they are assigned, an adequate record of fees should be kept, and a form to assist clergy in keeping track of their fees during the forthcoming year, entitled "Record of Incumbent's Fees received 2010/11" is available on the diocesan website. It would be helpful if you then sent the completed form to the diocesan office at the end of the year. Team vicars may, with the agreement of their incumbent, account for and deal with their own fees whether or not they assign them. It is recommended however that in all cases assistant staff pass any fees they receive to their incumbents. A guide on statutory fees is available from the Diocesan Office.

### **Parochial working expenses**

It is important that clergy come to an early agreement with the PCC on working expenses, as stipends are based on the assumption of 100% reimbursement. Please read the Church Commissioners' booklet, 'Parochial Expenses of the Clergy, A Guide to Reimbursement'. In the event of any difficulty, please consult your Archdeacon. To assist, copies of a claim form may be obtained from the Diocesan Office.

### **Life Insurance**

All stipendiary clergy are covered by the Church Commissioners' Group Assurance Scheme, which is non-contributory. If a stipendiary deacon or priest dies in service before the age of 65, a lump sum of three times the National Minimum Stipend for the previous year will be payable tax free - see Appendix 4. The Pensions Board has discretion as to whom this lump sum death benefit is paid. Although clergy aged 65-70 are also covered, the amount of benefit declines sharply to take account of the retirement lump sum payable at the age of 65. This policy does not apply to clergy over 70 or those who have already retired. You may decide to take out additional insurance,

which is cheaper when you are young. If you want access to independent financial advice, please contact the Diocesan Secretary.

### **Car loans**

The Church Commissioners have a central scheme for loans at 5% interest to buy cars, usually up to half stipend, repayable over 4 years. Application forms available from the Diocesan Office. See Appendix 4

### **Annual Return**

Please return your PUN (pink) Annual Income and Expenses form to the Church Commissioners as soon after the start of the tax year as possible. Actual fees, either assigned or not assigned, for the year to 31<sup>st</sup> March are to be shown. For NI and tax purposes, income from local trusts has to be paid by the Church Commissioners. Such payment is initially from the Diocesan Stipends Fund so clergy should either send trust income direct to the Diocesan Office or request the trustees to do so. Please also ensure that the parochial expenses shown to 31<sup>st</sup> March are those properly chargeable to the PCC. You are also advised to fill in your Tax Return promptly. It may well be worth seeking help from a clergy tax advisory service or an accountant, who for a reasonable fee will manage your tax affairs.

### **Voluntary Contribution to Pension**

During your service you can supplement your eventual pension entitlement by making additional voluntary contributions. You should seek professional advice.

### **Financial headaches**

If you have a financial problem which has arisen either by bad luck or bad judgment, get in touch with your Archdeacon - and please do so before your debts mount up!

The Archdeacons also have access to grants from various trusts that can assist clergy with unforeseen expenses (like travel to hospital for a course of treatment). They can often find ways of helping in case of need. Please contact them.

### **A Will**

It is important that both husband and wife make a Will, appointing Executors and stating who should benefit from the estate. Bereavement is painful enough without the added complications which arise when a person dies 'intestate', i.e. not having made a Will. It is well worthwhile to get a solicitor to draw up the Will, usually for a very modest fee. Make sure that Securities, Deeds and Wills are kept in a safe place, and that some other responsible person knows where to find them.

### **Higher Paid Status**

It should be noted that when total emoluments, i.e. stipend, fees, Easter Offerings and all expenses reimbursed or paid on behalf of the individual or household, are at an annual rate of £8,500 or more, the person will be deemed to be of "Higher Paid" status. The implication of this is usually some loss of benefits in respect of heating, lighting and cleaning but full details are given in the Churches Main Committee booklet "The Taxation of Ministers of Religion", circular No 1991/15.

## HEALTH

### **Moving in**

When you move in, make sure you register at once with a GP and a dentist. No doubt your neighbouring clergy or churchwardens will be glad to advise you about this.

### **Illness**

Let the Rural Dean and churchwardens know at once; they will arrange for all duties to be covered.

The Rural Dean will inform the Bishop and his Staff if a priest or deacon or one of his/her family is seriously ill, so that they can be cared for and prayed for.

If you incur extra expenditure through illness, please let one of the Bishops, your Archdeacon or the Diocesan Secretary know. They have access to funds that may be able to help you.

### **Sickness Benefit**

If you are ill for more than four working days, you should obtain a sick note and send it to the Clergy Payments Department of the Church Commissioners, Great Smith Street, London, SW1P 3NZ. You should have a copy of their standard form on which to notify them; if not, they will send you one.

The stipend will continue to be paid for the first 28 weeks of an illness. If your illness is likely to last longer than 28 weeks, your Archdeacon will ask your permission to talk to your GP or specialist about the prognosis or ask you to be seen by a doctor instructed by the Board and you will need to apply for incapacity benefit. Payment for services taken by a locum is the responsibility of the PCC, who may (if necessary) request help from the Diocesan Board of Finance to meet additional costs, which should be for no more than the usual number of services from a month after onset of sickness

### **Convalescence**

Proper convalescence after an operation or serious illness is vital. Funds are available to make this possible. One of the Bishops, your Archdeacon or the Diocesan Secretary will advise.

### **St Luke's Hospital for the Clergy**

Parishes may contribute to this Hospital, which provides excellent treatment, free of charge, to clergy, their spouses, widow(ers) and dependant children. Even if your parish does not contribute to St. Luke's, you and your family are still entitled to its services.

In case of need, a GP's referral letter should be sent to the Medical Officer at St Luke's, 14 Fitzroy Square, London, W1T 6AH, (tel: 020 7388 4954 or e-mail: [stluke@stlukeshospital.org.uk](mailto:stluke@stlukeshospital.org.uk)) by the patient's doctor, giving full medical history.

### **InterHealth**

This is a Christian charity which provides clergy with a confidential 'out of parish' healthcare service. This offers a chance to talk through any problems in an unhurried environment, to discuss lifestyle issues and also to identify any serious health problems at an early stage. If you feel this would be useful to you please contact your Archdeacon or the Diocesan Office.

### **Early retirement through ill health**

If this becomes necessary, it will have been discussed fully with the Bishop and Archdeacon. The financial and housing arrangements, whatever your age, are based on those that would have been the entitlement at normal retirement age.

## SCHOOLS

### Information

Information about local schools may be obtained from the Diocesan Director of Education at the Diocesan Education Centre, Devizes Road, Salisbury, SP2 9LY, Tel: 01722 428420 and from the Local Education Authorities. The Diocesan Director of Education and his staff are very willing to give advice about both local authority and church schools in your area.

Some independent schools offer bursaries for clergy children. For information write to:

The Independent Schools Council Information Service (ISCIS)  
Regional Director: Quentin Edwards  
Cools Farm  
East Knoyle  
Salisbury  
Wilts SP3 6DB  
Tel: 01747 830761  
Website: [www.isc.co.uk](http://www.isc.co.uk)

### Grants

- a. *County Council Schools including Maintained Anglican Schools.* There are some charitable trusts which may provide help, particularly if special schooling is needed, e.g. for disabled or gifted children. Also help may be available towards the cost of uniform, travel, books, equipment, musical instruments, from your local authority.
- b. *Independent Schools.* As well as ISCIS, the Diocesan Office has a copy of 'The Handbook of Grant Making Trusts and Charities' which may help. Appendix 2 gives a list of charitable organisations who may be able to provide grants both for educational and other purposes.
- c. *Student Grants and Fees.* Information on these is readily available from the Local Education Authorities, details of which are available from the Diocesan Education Centre.

## HOLIDAYS AND TIME OFF

All clergy should take an uninterrupted period of at least 24 hours in every seven days. Preferably a regular day in the week should be chosen, which should be known to parishioners. Clergy should take an uninterrupted period of 48 hours rather than 24 hours once a month.

Clergy are encouraged to take the agreed amount of holidays each year. Holiday times may not be 'carried over' into the following year, unless this has been agreed with the Archdeacon.

All full-time clergy should have paid holidays of six full weeks per year including at least four Sundays and whatever break they might take after major festivals. This excludes any discretionary special leave such as extended study leave.

In addition, clergy are encouraged to take the inside of a week each year for spiritual refreshment, whether on retreat or at cell group meetings.

Clergy may spend a reasonable time on public duties other than the duties of the office without any loss of stipend.

Particular care should be taken to ensure that clergy in employment (MSEs, NSMs and OLMs) have adequate time off, both days off and holidays.

Parish Priests should see that their assistant staff take the time allocated.

It is essential for Rural Deans to know when clergy are away. Undertakers should be advised. The payment of locum tenens fees for the above occasions is the responsibility of the PCC. It is sometimes possible to provide financial assistance with holidays; applications in the first instance should be made to your Archdeacon.

Guidelines have been drawn up to help deal with matters such as payment of stipend, leave entitlement taken around the time of leaving or changing posts. A copy of the Guidelines may be obtained from the Diocesan Office. Your Archdeacon is the key person to authorise and advise on these matters.

## WELLBEING

Ordained or accredited ministry brings many joys but it can also be stressful and demanding. As well as serving others it is vital that we make proper provision for our own personal and professional wellbeing. The Diocese is committed to supporting all those who minister in its name with appropriate resources. These focus in three areas:

- *My role* (professional development)
- *My relationships* (interacting with others)
- *Myself* (self awareness and care)

For further information please ask for a copy of the Diocesan Wellbeing leaflet which is available from the Learning for Discipleship and Ministry Team Office, or look on the Diocesan website. The Diocese has three Wellbeing advisors any one of whom can be contacted in complete confidence for advice or to help you access the resources you need.

The Rev David Hart (Wellbeing Co-ordinator)  
Church House 01722 411944  
Direct dial 07739 219356  
[david.hart@salisbury.anglican.org](mailto:david.hart@salisbury.anglican.org)

The Rev John Tomlinson (Ramsbury contact)  
[Johnandclare-atuwvy@tiscali.co.uk](mailto:Johnandclare-atuwvy@tiscali.co.uk)

Jo Lacy-Smith (Sherborne contact)  
[jolacysmith@copperstream.co.uk](mailto:jolacysmith@copperstream.co.uk)

## RETIREMENT

### General

Our Diocesan Clergy Retirement Officers (see Appendix 3) are able to give details of the practical issues concerning retirement. What follows is a brief outline.

Clergy must retire at the age of 70 but are entitled to a full pension when they have completed 37 years' service, provided they have reached their 65th birthday, which is now the age at which the great majority of clergy retire. After the age of 70, clergy can apply to the Bishop for Permission to Officiate.

### Pension

On retirement, a cleric is entitled to a tax free lump sum payment and pension. The current rate is shown in Appendix 4. If you retire before completing the maximum period of 37 years, both pension and lump sum are adjusted accordingly (for example, 15 years' service entitles you to 15/37<sup>ths</sup>). Provision for voluntary contribution during service to supplement the pension is covered in the '**Money**' section.

### Retirement Housing

In the last few years the arrangements for housing have greatly improved. It is no longer the case, for example, that if you neither have your own house nor have sufficient capital to buy one, you have little choice about where you live. Apart from the good convention that you should not retire within the parish in which you are serving, within reason it is possible to choose where you wish to retire.

For housing purposes, retiring clergy fall roughly into five categories:

1. Those who have a house of their own, and wish to retire into it.
2. Those who have enough capital to enable them to purchase a property of their own.
3. Those who have some capital, and who wish to take advantage of the Pensions Board's new Shared Ownership scheme, which replaced the value linked mortgage scheme in April 2008.
4. Those whose capital is very small or non-existent, and who would wish to rent a property from the Pensions Board.
5. Those who wish to move into a residential home - full details are available from the Pensions Board.

It is not possible to give any exact answers to the degree of help which can be given because so many factors have to be taken into consideration. But in all cases the Church of England Pensions Board is very ready and willing to advise, and is prepared to consider the purchase of a retirement house at the age of 57 for stipendiary clergy.

The prospect of retirement is no longer the material anxiety it used to be for so many of our predecessors. Hopefully it is something we can look forward to, knowing that we will be materially secure. However increases in house prices have led to increased levels of anxiety and there is no substitute for planning positively for one's retirement well in advance.

You may remain in your clergy house free of charge for one month beyond your date of retirement.

### Removal Expenses

The Board will pay the removal costs of retiring clergy. If moving abroad, the Board will pay up to the average cost of a UK move undertaken during the previous 12 months. Three quotes should be obtained without transit insurance, the lowest may be accepted and copies of the quotes sent to the diocesan office. The invoice should also be sent direct to the diocesan office for payment.

## **BEREAVEMENT IN SERVICE**

Nothing can reduce the shock of bereavement. But some practical advice may help.

### **Preparing**

Draw up a list now of where certain things are kept, such as, for example, Wills, marriage certificates, birth certificates and insurance policies; lists of those to be notified of the death, so that someone else can do this on your or your widow(er)'s behalf if you wish; and any special requests regarding funeral arrangements (which should be stated in the Will).

### **But what do I do when someone in the clergy family dies?**

Telephone the Rural Dean (who will notify the Bishop and Archdeacon) whenever there is any family bereavement. In the event of the death of a stipendiary priest or deacon also advise the Diocesan Office, as the Diocesan Secretary will immediately get in touch with the Church Commissioners about the death-in-service benefit. In the event of the death of a retired priest or spouse please advise the Diocesan Widows' Officer in the appropriate archdeaconry (who will notify the Bishop and Archdeacons). You will find the Officers' addresses in Appendix 3.

### **Finance and your pension**

All serving clergy are insured by the Church Commissioners against death in service - see **'Money'**. Although clergy aged 65-70 are also covered, the amount of benefit declines sharply to take account of the retirement lump sum payable after age 65. This policy does not apply to clergy over 70 or those who have already retired.

A widow(er) will receive a proportion of the pension that his/her spouse would have received on normal retirement from the date of death. The Diocesan Office will inform the Pensions Board, who will initiate payments.

You may also receive the State benefit, and the local Social Security office will advise on this.

### **Housing**

In the case of anyone living in a tied house, the widow(er) has to leave his/her home. We recognise that this is an extra burden on top of an already painful situation. A widow(er) has a **legal** right to remain for two months, but the Diocese would not be hard and fast about regarding this as a maximum, and a mutually satisfactory arrangement will be made which takes into account both the circumstances of the widow(er) and the future ministerial needs of the parish.

The person to consult about where to live is the Clergy Retirement Officer (see Appendix 3), who will also be glad to negotiate with the Pensions Board on your behalf.

## **BEREAVEMENT IN RETIREMENT**

### **Pension**

A widow(er) may be entitled to a (reduced) State Pension, and he/she will also receive a pension equal to 2/3rds of the pension of the deceased person. No further lump sum is payable, but if a cleric dies within one year after retiring, the balance of the first year's pension is payable to his/her estate. A supplementary pension is also payable when necessary to a widow(er) or dependant and certain benefits in respect of dependant children are also available.

There is a minimum income standard for all clergy widows/widowers. Augmentation grants may be awarded by the Pensions Board.

There are Retired Clergy and Widow(er)s and Dependents Officers in each deanery who are ready to help with any advice you need.

### **Housing**

If you have a value-linked mortgage loan with the Pensions Board, or occupy a property under Licence, you will be able to remain in your retirement home, unless you choose to move, in which case the Pensions Board, the Bishop's Adviser for Retired Clergy and Widow(er)s and Dependents and/or the Deanery Officer will discuss suitable alternatives with you. The Pensions Board will consider sympathetically the position of dependants on your death, if appropriate, but would not normally expect to continue to house them.

### **Children**

The following charitable trust offers grants and help for many needs of children's education and training:

The Clergy Orphan Corporation  
1 Dean Trench Street  
London  
SW1P 3HB

## APPENDIX 1

### USEFUL READING

#### **From the Church Commissioners (see appendix 3 for contact details)**

1. Your Stipend - What you need to know.
2. Parochial Expenses of the Clergy - a guide to reimbursement. £1 incl. postage and packing.
3. The Taxation of Ministers of Religion published by the Churches Main Committee. e-mail: [cmc@c-of-e.org.uk](mailto:cmc@c-of-e.org.uk).

Your tax affairs are dealt with by:

HM Revenue and Customs,  
West Yorkshire and Craven Area  
Centenary Court  
1 St Blaise Way  
Bradford BD1 4YL  
Tel: 01274 205714. Tax ref: 073/C16

Publication 1 above can be downloaded from [www.cofe.anglican.org/info/clergypay](http://www.cofe.anglican.org/info/clergypay)

#### **From the Church of England Pensions Board (see appendix 3 for contact details)**

4. The Church of England Voluntary Contributions Scheme.
5. Your Pension Questions Answered.
6. Retirement Housing.
7. Church's Housing Assistance for the Retired Ministry.
8. Pensions, Grants and Housing Assistance.

Publications 4 and 5 above can be downloaded from [www.cofe.anglican.org/about/cepb](http://www.cofe.anglican.org/about/cepb)

#### **From The Diocesan Office:**

9. Statutory Fees – Bishop's Guidelines
10. A Fairer Share – Sharing the cost of ministry

## APPENDIX 2

### GRANTS

#### General

##### **FRIENDS OF THE CLERGY and SONS OF THE CLERGY**

**1 Dean Trench Street, Westminster, London Tel: 020 7799 3696 Fax: 020 7222 3468.**

**e-mail: [enquiries@clergycharities.org.uk](mailto:enquiries@clergycharities.org.uk) website [www.clergycharities.org.uk](http://www.clergycharities.org.uk)**

The objectives of these two leading grant-making charities are to provide financial help to Anglican clergy and their families in times of need. Between them, they are able to help towards a wide range of expenses, including school clothing and school trips, clerical clothing, holidays and resettlement, heating and home maintenance for the retired, bereavement expenses and some of the expenses arising from separation and divorce.

##### **NEWTON'S TRUST**

**Chapter Office, 19a The Close, Lichfield, Staffs, WS13 7LD. Tel 01453 306104**

Established to provide financial assistance to widows or unmarried daughters of deceased clergymen and to divorced or separated wives of clergymen of the Church of England.

##### **LLEWELLYN EDWARDS BELL RESTORATION FUND**

**Administrator: M G Moyes, Old Manse, Holt, Trowbridge BA14 6RS. Tel 01225 782444**

Assists Churches within Salisbury Diocese with restoration and maintenance of bells and to provide new bells. It also assists with repairs to bells, frames and fittings and to the fabric of the towers and belfries.

#### Educational

##### **THE ATHERLEY SCHOOL AND GROVE PLACE PREP.SCHOOL**

**Grove Place, Upton Lane, Nursling, Southampton, SO16 0AB Tel 023 80741629.**

Email: [office.atherley@church-schools.com](mailto:office.atherley@church-schools.com) Offers independent education for girls of 3 to 18 years and boys of 3 to 11 years. There are means-tested clergy bursaries available.

##### **SONS OF THE CLERGY and FRIENDS OF THE CLERGY (see general grants above)**

##### **THE BUTTLE TRUST**

**32 Denison House, 296 Vauxhall Bridge Road, London SW1. Tel 020 8828 7311**

Makes very generous grants to children over 8 years in particular to adopted children. Grants can include maintenance as well as education. They are paid direct to the School and the Trustees must be satisfied that Church of England teaching is given fully in the School.

##### **KING EDWARD'S SCHOOL**

**Witley, Wormley, Godalming, Surrey GU8 5SG. Tel 01428 686700**

Offers eleven year old children City of London Scholarships. Also Bridewell Endowments for children whose home background makes boarding education a special need.

##### **THE HABERDASHERS' COMPANY**

**Haberdashers' Hall, Staining Lane, London EC2V 7DD. Tel 020 7606 0967**

The Company administers the financial trust - The Jeston Charity. Application has to be made for a meeting of the Court of the Company in December each year. There is usually a long waiting list so early application is necessary.

##### **THE THOMAS WALL TRUST**

**1 York Street, Baker Street, London W1 .**

Makes grants for further education of all kinds, but in exceptional circumstances will also assist with the education of children at school. This Trust also makes interest-free loans for any kind of training, repayable after the child enters into employment.

**THE TOBIAS RUSTAT TRUST**

**The Dean, Jesus College, Cambridge CB5 8BL**

The primary object is to provide Scholarships or Exhibitions at Jesus College for children of Church of England clergy. The Trust can also provide help for children of especially needy parents, in easing urgent and unforeseen need and for special reasons such as physical or mental handicap. Applications must contain the fullest details and enclose evidence of diocesan support from the appropriate Area Bishop or Archdeacon.

**WESTONBIRT GIRLS' PUBLIC SCHOOL**

**Tetbury, Gloucester, GL8 8QG. Tel 01666 880333**

The School is based on an anglican foundation and, as a consequence, a special discount from normal fees of up to 30% is available to daughters of clergy.

**WALHAMPTON SCHOOL**

**Walhampton, Lymington, Hampshire SO41 5ZG. Tel 01590 672013**

The School has a bursary to assist with the education of a child which has a real need for boarding but insufficient financial support.

**TALBOT HEATH SCHOOL**

A caring Anglican, independent day and boarding school for girls aged 3-18 and boys 3-7. Very generous bursaries available for children of Church of England clergy.

**ST MARY'S HALL**

**Eastern Road, Brighton, East Sussex BN2 5JF**

The School has bursaries for clergy daughters in boarding need.

**THE OFFICERS' ASSOCIATION**

**48 Pall Mall, London SW1Y 5JY. Tel 020 7389 5227/5228**

For clergy who have served in the Forces.

**THE GABBITAS-THRING EDUCATIONAL TRUST**

**Broughton House, 6/9 Sackville Street, London W1**

This organisation advises on education problems and gives grants where there is proven need, but will also give the names of additional Trusts where educational grants may be obtained.

**LOCAL EDUCATION AUTHORITIES**

The Local Education Authorities of Bournemouth, Devon, Dorset, Hampshire, Poole and Wiltshire do not normally make grants for private education except in very exceptional circumstances, eg in the case of a father taking up an appointment abroad where there is no suitable source of education. Enquiries should be addressed to the Chief Education Officer of the appropriate Authority.

**THE REV CHARLES MAYO TRUST**

**Jennifer Parker 86 High Street Marlborough Wilts SN8 1HF Tel: 01672 515151**

Grants for further education are available under the Trust for the sons of living or deceased clergymen of the Church of England, who have ministered and resided at least five years in the County of Wilts or in the Diocese of Salisbury. Apply well in advance.

**EDUCATION GRANTS ADVISORY SERVICE**

**The National Council of Social Service, 26, Bedford Square, London WC1B 3HU**

Has no funds of its own but, for a small processing charge, will advise provided local education authorities have already been approached. Assistance increasingly restricted to cases of child taking examinations with programme in danger of interruption.

**JOINT EDUCATIONAL TRUST**

**Mr R A Cooper MC MA, Birdbush Cottage, Ludwell, Shaftesbury Dorset SP7 9NH**

For children whose future well-being is at risk without a new educational environment.

**ST JOHN'S SCHOOL**

**Leatherhead, Surrey KT22 8SP**

Boarding education for boys aged 13-18, also day boys and Sixth Forms girls. Substantial help with fees available to sons and daughters of the clergy. Applications to the Headmaster, Mr Christopher Tongue MA.

**BISHOP PIKE TRUST**

**c/o Diocesan Education Centre, Devizes Road, Salisbury SP2 9LY**

Small grants for education in the broadest sense, including sport, music, field trips and other activities connected with school and the immediate post-school period.

**SHAW FLETCHER EDUCATIONAL TRUST**

**Miss C Johnson, c/o Church House, Crane Street, Salisbury SP1 2QB**

Set up exclusively for the children of clergy in this diocese. Grants are offered for activities and educational needs which encourage the spiritual, moral and educational development of clergy children up to the age of 18 years.

## APPENDIX 3

### USEFUL CONTACTS

The following contacts may be of use. E-mail addresses are all the same format and all in lower case ie:

[Department or firstname.surname@salisbury.anglican.org](mailto:Department.or.firstname.surname@salisbury.anglican.org)

**Diocesan Office**, Church House, Crane Street, Salisbury, Wilts SP1 2QB.  
(01722) 411922 Fax (01722) 411990

**Board of Finance: Stipends Secretary**  
Church House, as above (01722) 411955  
e-mail: [carolyn.cropp@salisbury.anglican.org](mailto:carolyn.cropp@salisbury.anglican.org)

**Accounts Department**  
Church House, as above (01722) 411955

**Diocesan Advisory Committee Secretary**  
Church House, as above (01722) 438654

**Property Department**  
Church House, as above (01722) 411933 Fax (01722) 329833

**Learning for Discipleship and Ministry Team**  
Church House, as above (01722) 411944. [ldmt@salisbury.anglican.org](mailto:ldmt@salisbury.anglican.org)

**Wellbeing** The Rev David Hart, Church House, as above (01722) 411944  
Jo Lacy-Smith, e-mail: [Jolacysmith@copperstream.co.uk](mailto:Jolacysmith@copperstream.co.uk)  
The Rev John Tomlinson, e-mail: [johnandclare-atuwvt@tiscali.co.uk](mailto:johnandclare-atuwvt@tiscali.co.uk)

**Communications** Church House, as above (01722) 438651

**Board of Education** Diocesan Education Centre, Devizes Road, Salisbury, SP2 9LY  
(01722) 428420, Fax (01722) 328010

**Area Resource Groups**  
Sherborne Area Office (01202) 659427  
Ramsbury Area Office (01380) 729808

**Diocesan Registrar** The Registry, Minster Chambers, 42/44 Castle Street, Salisbury  
Wilts SP1 3TS (01722) 411141

**Chapter Office** 6 The Close, Salisbury, Wilts SP1 2EF (01722) 555100

#### **Bishop's Visitor to Clergy Spouses:**

**Dorset:** Hugh Privett, The Manor House, Marston Magna, Yeovil, BA22 8DW (01935)  
850294

**Wilts:** Dr Celia Grummitt, Gateways House, London Road, Shrewton, Salisbury SP3 4DC  
(01980 621587)

#### **Clergy Retirement Officers:**

**Ramsbury:** The Rev Michael Turner (01722) 504000 e-mail: [sarum.turners@ntlworld.com](mailto:sarum.turners@ntlworld.com)

**Sherborne:** The Rev David Thompson (01202) 668904 e-mail: [davidthompson@uwclub.net](mailto:davidthompson@uwclub.net)

#### **Diocesan Widows' Officers:**

**Wilts:** The Rev Canon Peter Hardman, 55 Palaiet Close, Bradford on Avon, wilts BA15 1US (01225) 867198. e-mail: peterhardman@onetel.com  
**Sherborne:** The Rev Canon Dr Brian Godfrey, Rowans, Kingcombe Road, Toller Porcorum, Dorchester, DT2 0DG (01300) 320833. e-mail: brian@rowanstp41.fsnet.co.uk  
**Dorset:** The Very Rev David Frayne, Newlands Cottage, Peacemarsh, Gillingham, Dorset SP8 4HD (01747) 824065. e-mail: davidfrayne666@btinternet.com  
**Sarum:** The Rev Ian Chisholm, 33 Meadway, Shrewton, Salisbury, Wilts SP3 4HE (01980) 620579

**Church Commissioners**

Church House, Great Smith Street, London SW1P 3NZ (020) 7898 1000

**Church Commissioners (Stipends)**

Church House, Great Smith Street, London SW1P 3NZ. (020) 7898 1604  
(020) 7898 1604

**Clergy Appointments Adviser**

The Rev John Lee, Fielden House, Little College Street, London SW1P 3SH  
(020) 7898 1898

**Church of England Pensions Board**

29 Great Smith Street London SW1P 3PS (020) 7898 1800

**Archbishops' Council**

Church House, Great Smith Street, London SW1P 3NZ (020) 7898 1000

**Church House Bookshop**

31 Great Smith Street, London SW1P 3BN (020) 7898 1304  
Mail Order (020) 7898 1301

**St Luke's Hospital for the Clergy**

14 Fitzroy Square, London W1P 6AH (020) 7388 4954

**SPCK (Salisbury)**

51 High Street, Salisbury, Wilts SP1 2PE (01722) 334535

## APPENDIX 4

### OTHER USEFUL INFORMATION

#### DIOCESAN INFORMATION

1. Copies of the Diocesan Directory are available from the Diocesan Office. You should also have a copy of the Diocesan Handbook (a copy is also held by each PCC Secretary).
2. The diocesan Newspaper "Sarum Link" is published each month and widely distributed. Please contact the Communications Office at the Diocesan Office with any queries.
3. There are regular communications with clergy through a weekly e bulletin.

#### STIPENDS - INCUMBENT STATUS CLERGY

4. Diocesan standard stipend for Incumbents, Team Clergy and full-time Priests in Charge from 1 April 2010 is at £22,900.
5. **Assignment of fees.** You may decide to assign your fees to the Diocese, which means that you pay your fees, at least quarterly, to the Diocesan Office, in return for which your augmentation and thus your stipend is paid at the full standard rate each year. This helps your cash flow and is strongly recommended.

#### STIPENDS - ASSISTANT CLERGY AND LAY WORKERS

6. The Diocesan stipend for Assistant Curates and Licensed Lay Workers from 1 April 2010 is £20,790.

#### ADDITIONAL FINANCIAL BENEFITS

7. **Removal Expenses.** Expenses of removal within the United Kingdom for full-time clergy and licensed lay workers arriving in the Diocese or moving to a new post within the Diocese are paid by the Board of Finance.
8. **Resettlement Grant.** A Resettlement Grant of £2,040 (from 1 April 2010) to reimburse additional expenses incurred in a move is payable, in addition to the removal expenses.
9. **First Appointment Grant.** A First Appointment Grant of £2,040 (from 1 April 2010) is payable to clergy entering their first post of incumbent status, and to assistant curates on commencing their diaconate.
10. **Insurance.** Under a Central Group Assurance policy, a capital sum of £60,690 (from 1 April 2010) will normally be payable on the death of a clergyman/woman under the age of 65 holding a full-time office in the Diocese. It also covers those between the ages of 65 and 70, but with the lesser benefits according to age taking account of lump sum entitlement under the Pensions Measure.
8. **Pension.** The pension for all clergy and licensed lay workers other than dignitaries, on retirement after age 65 and after 37 years or more pensionable service will be £13,486 (from 1 April 2010).
9. **Lump Sum.** A lump sum is payable to clergy upon retirement and to the estates of those who die after the age of 65 but before retirement. From 1 April 2010 £40,458 will be payable for full service with proportionately smaller sums for shorter periods of service.

10. **Widow(er)s Pension.** Pensions payable to widow(er)s on death in service are 2/3rds of the member's prospective pension. The full basic survivorship pension will thus be £8,991 from 1 April 2010.
11. **National Car Loan Scheme Maximum.** The clergy payments department operates a national scheme of car loans for all serving clergy and licensed lay workers paid through their office, but cannot offer loans to retired clergy. The maximum loan is currently £10,215 and interest is charged at 5% p.a. Repayments (normally over 4 years) will be deducted at source from stipend. An application form may be obtained from the Diocesan Office, or downloaded from [www.cofe.anglican.org/info/clergypay/car-loans/s50.pdf](http://www.cofe.anglican.org/info/clergypay/car-loans/s50.pdf), and must be forwarded to the Diocesan Office when completed.
12. **Fees for Casual Services.** The fee for retired priests in 2010 is £27 for Holy Communion, Parish Communion, Matins and Evensong. The fee is linked to one half of the Incumbent's fee for a funeral service in church. Reimbursement of travelling expenses is currently 40p per mile. Expenses, but not fees, are payable to stipendiary and non-stipendiary minister and to Readers.