

# **Supporting the Ministry of Retired Clergy**

**June 2014**

*This advice issued by the Remuneration and Conditions of Service Committee of the Archbishops' Council is an updated version of advice first issued in June 2007.*

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# 1 Foreword

Ordination to the Priesthood, in the Church of England, is understood as a life-long vocation, as is presumed in the Bishop's Introduction, at the beginning of the Common Worship Ordination Service, which contains the following words: "Priests are ordained to lead God's people in the offering of praise and the proclamation of the gospel. They share with the Bishop in the oversight of the Church, delighting in its beauty and rejoicing in its well-being. They are to set the example of the Good Shepherd always before them as the pattern of their calling. With the Bishop and their fellow presbyters, they are to sustain the community of the faithful by the ministry of word and sacrament, that we all may grow into the fullness of Christ and be a living sacrifice acceptable to God."

Ordained ministers are called, without any limit of time, as long as they live, to proclaim the glory of God in every part of their lives, not just in the exercise of celebrating public services. However the precise expression of that vocation in authorized public ministry is likely vary during a cleric's ministry. Following retirement from stipendiary ministry, many clergy wish to continue their ministry

This advice (first issued in 2007) has been produced to assist bishops and archdeacons in supporting retired clergy and enabling them to continue to contribute towards the Church's mission and ministry in a way that is beneficial both for them and for the Church. It has now been updated to reflect changes to the clergy's terms of service following the coming into effect of the Ecclesiastical Offices (Terms of Service) Measure and Regulations 2009, the recently amended Ecclesiastical Fees Measure 1986, and other legislation.

It draws on diocesan good practice and further input from the Retired Clergy Association. I hope that it will encourage the ministry of retired clergy – on which the Church relies so heavily – to continue to flourish.

+ DAVID MANCHESTER

Chair of the Remuneration and Conditions of Service Committee

June 2011

## 2 Definitions

2.1 In this advice the term 'retired clergy' includes:-

- those who have retired from full-time stipendiary ministry and are in receipt of a clergy pension;
- self supporting ministers on permission to officiate who no longer hold a licence.

2.2 This advice is primarily intended to provide informal advice and suggestions or flag up other sources of relevant guidance and information. Where it does refer to specific legal requirements, with which bishops, archdeacons and clergy must comply, it uses *must* or *required*. Where something is regarded as minimum good practice, but there is no specific legal requirement, it uses *should*. This good practice should be followed unless there is a good reason not to.

### 3 Preparation for retirement

3.1 There are three main areas where clergy need to prepare for their retirement

- (a) long term financial planning for retirement (including retirement housing), which needs to be considered right from the start of their ministry
- (b) starting discussions with the Pensions Board about retirement housing in good time before retirement
- (c) considering what ministry they might wish to offer in retirement.

#### *Long term Financial Planning*

3.2 Clergy should be encouraged to seek independent financial advice right from the start of their ministry via

- the Financial Conduct Authority website [www.fca.org.uk](http://www.fca.org.uk)
- [www.moneyadviceservice.org.uk](http://www.moneyadviceservice.org.uk) and
- [www.unbiased.co.uk](http://www.unbiased.co.uk).

3.3 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. Those providing advice on retirement for clergy may not, by law, offer financial advice nor direct any person to a particular financial adviser.

3.4 They should also contact the Pensions Board to make themselves aware of the level of pension and assistance with housing provision that will be available in retirement.

#### *Retirement Housing*

3.5 Clergy who live in a provided house will need to find a home of their own in retirement. Ten years before the likely date of retirement is not too soon to be actively considering the question of retirement housing. See section 4.

3.6 Clergy who need assistance with retirement housing should contact the Church of England Pensions Board's housing department well in advance of retirement. It can be helpful to make the initial approach after attending the pre-retirement course at aged 55. Finding suitable retirement housing can take up to a year, and it is important to allow enough time for this when planning for retirement. It should be noted that retirement housing is not provided 'as of right'.

### *Ministry in Retirement*

3.7 The Church has a real need of the ministry of retired clergy for those who wish and feel able to offer it, but they do not have any right to any particular public ministry. There are now an increasing number of options that they may wish to consider - including working in a part time post, staying in post on a temporary basis, and taking up a stipendiary post even though retired and in receipt of pension<sup>1</sup>. Details are provided at Appendix III. Clergy are recommended to make sure that they understand the varied forms that ministry in retirement may take and to consider with some care their options as to the kind of ministry that they may wish to offer. Ultimately they do not have a right to ministry in retirement – it is more about the needs of the Church and what they have to offer.

3.8 Nevertheless, as Appendix III shows, there are number of options other than retirement with permission to officiate, such as taking a house for duty post. These can have the effect of phasing retirement. Clergy may find it helpful to take a significant break (of up to six months) immediately after retirement, and not to get involved in ministry or committed to other activities during this time.

### *Sources of information*

3.9 Potential ways of involving clergy in retirement planning include the following

- MDR
- Pre retirement courses
- Circulating information
- Contacts with retired clergy.

### *MDR*

3.10 Discussions during ministerial development review can flag up the need to consider arrangements for the provision for housing in advance of retirement, and enable clergy to be directed to available advice.

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<sup>1</sup> Subject to a clear break between the last period of stipendiary pensionable service and any post-retirement stipendiary service

3.11 Discussions about preparation for retirement can usefully be raised as a matter of course during ministerial review from age 60, as it is helpful to provide information to clergy to consider their options for the future, as set out at Appendix III. However, it is important not to raise this in a way that is perceived as an encouragement to retire in case that is misconstrued.

3.12 Dioceses may also find it helpful to be aware of the possible retirement plans of their clergy when considering their mission plans and deployment strategies in the longer term. See section 7.

#### *Pre-retirement courses*

3.13 Bishops are encouraged to provide and arrange free retirement courses for clergy and their spouses/civil partners. These can be arranged jointly with neighbouring dioceses. Clergy should attend a course any time after reaching their 55th birthday. This is useful opportunity for clergy to be reminded to make contact with the Pensions Board about retirement housing well in advance of retirement, as it can take some time to find a suitable house. Retirement officers may wish to organise a follow up course 6 – 18 months after retirement.

#### *Information for circulation*

3.14 Information that can be circulated to clergy in advance of retirement (say, at 55 and again at 60) includes the following

- (i) a copy of this set of guidelines on the ministry of retired clergy (particularly Appendix III)
- (ii) current information from the Pensions Board on level of pension and assistance with housing provision in retirement (stipendiary clergy only)
- (iii) details of retirement courses and opportunities for contacts with retired clergy (see below)
- (iv) details about the Retired Clergy Association and any other information provided by the Diocese
- (v) reminders of the latest versions of guidance – available on the Church of England website – on parochial expenses and parochial fees.

#### *Contacts with retired clergy*

3.15 Some dioceses have found it useful to have a number of suitably qualified recently retired clergy supported and commended by the bishop, to meet clergy and their spouses/civil partners around the age of 55 and between three and one year before retirement. These clergy can

- advise on the kinds of ministry clergy might undertake after retirement from stipendiary ministry;

- explain the changes that come with retirement (including how some clergy can feel outside the family of the Church once they retire) and stress the value of available diocesan clergy networks for retired clergy;
- encourage the cleric and spouse/civil partner to go on the retirement courses offered by the diocese; and
- encourage the cleric to make contact with the staff at the Pensions Board to clarify the support and level of pension available to them in retirement.

## **4 At retirement**

4.1 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.

4.2 It is often desirable for the diocesan bishop – or a member of his senior team – to meet clergy, when they retire from ministry. Likewise it may also be helpful, when they move to another diocese on retirement or subsequently, for them to see the bishop or a member of his senior team to discuss the kind of ministry that they might be able to offer.

4.3 When a cleric moves to a different diocese on retirement, or subsequently, the bishop of the sending diocese should ask the cleric's permission to notify the bishop of new diocese. The bishop of the new diocese should write to the retired cleric to welcome them. Soon after their arrival in the area, the bishop or retirement officer (see Appendix I) should meet the retired cleric, discuss what ministry (if any) the retired cleric might wish to offer and go through the procedures that are required if he or she is to exercise a ministry. If permission to officiate is to be granted, this will include a clergy current status letter (CCSL) and an episcopal reference from the sending diocese.

4.4 The retirement officer should explain the various networks and contacts, and provide details of available grants, Synodical representation, opportunities for Continuing Ministerial Development (CMD), and ask whether the cleric wishes to be visited by the visitor once a year, and encourage him or her to register details of the next of kin (including the address) with the bishop's office where it will be kept securely.

4.5 As part of the retirement process, the Pensions Board seeks consent from retired clergy for their addresses to be passed to retirement and widow(er)s officers. It provides updated lists every six months.

## **5 Retirement officers**

5.1 Initial pastoral care is the responsibility of the appropriate parish priest. Bishops should appoint retirement officers to assist in meeting these responsibilities. A model job description is provided at Appendix I.

## 6 Widows and widowers officers

6.1 Under section 40 of Clergy Pensions Measure 1961, diocesan boards of finance must appoint 'a diocesan widows and dependants committee' to watch over their interests and 'an officer or officers' to keep the committee informed about their circumstances and make 'proper representations on their behalf. A model job description is provided at Appendix I.

## 7 The deployment of retired clergy

7.1 Retired clergy are a reservoir of theological, spiritual, counselling and other experience, available to the church. 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. 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.

7.2 Ordination is for life, and many retired clergy wish to continue to offer a pastoral ministry, freed from some of the formal and administrative business of being a parish priest or sector minister. If they wish to do this, they must either be issued with a licence or be given PTO. For more information, see the *advice on the deployment of clergy with licences and permission to officiate*.

7.3 Most retired clergy will probably have a ministry that does not require a licence, but which needs permission to officiate. However, where they are in a post of significant responsibility, or a house is provided or they are an integral member of the ministry team, it will be appropriate for them to exercise their ministry under licence. This means they will be under common tenure and must be issued with a statement of particulars unless they hold their licence solely in conjunction with a contract of employment. They will also be subject to the capability procedure and be required to participate in MDR at least once every two years and CMD.

7.4 Retired clergy should be reminded of the following.

- The purpose of all ministry is to further the Kingdom rather than to affirm the status of the minister. Retired clergy do not have an automatic right to preach or preside at the Eucharist, nor is this necessary to be true to their priestly ordination.
- On reaching retirement age, they do not have a right to hold office in order to increase their pension provision or give access to provided housing after retirement.
- Clergy on PTO carry out their ministry at the invitation of the incumbent or priest in charge, who may decide what ministry, if any, a retired cleric should have in the parish and the retired cleric must respect this.



7.5 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 the permission to officiate.

## **8 Conducting public worship**

8.1 A request to conduct public worship should normally be issued by the incumbent or priest in charge. Those inviting retired clergy to conduct worship might find it helpful to complete and send them the form in Appendix III to ensure that they are fully informed.

8.2 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 Occasional offices**

9.1 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 relevant incumbent or priest in charge.

9.2 Some retired clergy may have a particular ministry to the bereaved; this could perhaps be recognised in an exchange of letters with their own incumbent, or local

incumbents in the deanery, which makes it clear how their ministry 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.

9.3 Following the coming into effect of the amended Ecclesiastical Fees Measure 1986, parochial fees - in all but a very a few cases (such as at a cathedral) - are the property either of a diocesan board of finance (DBF) or a parochial church council (PCC). The DBF fee is legally owned by the DBF and is for the DBF to decide to which of its purposes that income should be applied. Fees due to the DBF for occasional services are intended to cover the full cost of providing authorised ministry – they are not a fee for the services of a particular minister. The fee is, therefore, payable to the DBF regardless of whom the actual minister is and whether or not they receive a stipend.

9.4 It is for a DBF to decide what remuneration might be paid to those ministers who are not in receipt of a stipend (SSM/NSMs, retired clergy with PTO, other clergy with PTO, Readers/licensed lay ministers (LLMs)). The Archbishops' Council has offered the guidance below, but it is for each DBF to decide whether to adopt it, and if it is adopted, how widely payments should be made, and how it is to be adopted, – for example, a diocese could implement the proposals in a phased way).

9.5 The Archbishops' Council has issued the following guidance on parochial fees. It was reissued in 2014.

“a. A DBF *might* decide to set aside 20% for central diocesan costs such as Continuing Ministerial Development, and 80% to stipends. These figures are not intended to be prescriptive, and it remains for each DBF to come to a view on how to use income from fees;

b. That payment be *offered* to retired clergy, though some may of course decline it, or receive it and then donate it to PCC or DBF. This could be the normal arrangement for every priest (including those whose former licensed service was non-stipendiary) with permission to officiate. Advice has been received that such payments, on a casual, ad hoc basis, would not normally constitute an employment relationship between a DBF and the minister concerned (but Diocesan Registrars should be consulted where arrangements are put in place that go beyond paying ministers on a casual basis – for example where retired clergy undertake to conduct a minimum number of services for an agreed overall sum);

c. In all cases, it should be made clear to ministers receiving such payments that they are responsible for declaring this income to HMRC for tax purposes.

20. Should the diocese decide to offer remuneration to ministers not in receipt of a stipend, DBFs will need an administrative system for making any payments to these ministers. This might easily be incorporated within an existing system for 'Casual Duty' payments, with the payment on offer being listed along with those for other services.

21. For stipendiary ministers matters relating to fees and associated ministry will be coverable under a Statement of Particulars. For Readers these matters will be covered by a written agreement. Ministers with Permission to Officiate (PTO) have no such document, but it is strongly recommended that bishops/dioceses put in place a document, for example, an information sheet, to sit alongside a PTO; this could cover:

- a. Whether payment for pastoral services may be claimed;
  - b. The processes for claiming such payment and the importance of HMRC declaration;
  - c. A requirement to liaise with the incumbent or priest-in-charge of the benefice in question when exercising a ministry;
  - d. Access to CMD relevant to the ministry being exercised (see Para 23, below);
  - e. Arrangements for review/renewal of PTO, relationships with Rural/Area Dean and such other matters as a diocese may think useful.
- Dioceses will in any case need to communicate the new arrangements clearly.”

9.6 Pensions in payment may not be reduced or suspended if a pensioner receives earnings from ecclesiastical office or employment.

9.7 For further information, see Appendix III.

## 10 Expenses

10.1 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.churchofengland.org/clergy-office-holders/clergypay.aspx>

Retired clergy should not normally receive expenses for taking a service in their usual place of worship. Even in a large rural multi-parish benefice, they should not normally receive travel expenses for taking services at the church where they usually worship, although expenses should be paid for services taken at other churches within the benefice.

## **11 Ministerial development review (MDR)**

11.1 All retired clergy *who hold a licence* must participate in any ministerial review scheme operated by the diocese for self supporting ministers.

11.2 Retired clergy with permission to officiate, even if their duties are occasional, should also have a regular review (say every two or three years) of their permission to officiate probably with their incumbent/priest in charge or the area/rural dean. This will also provide an opportunity to highlight any training or development needs, as they should have access to continuing ministerial development where this appropriate.

## **12 Continuing ministerial development (CMD)**

12.1 Continuing ministerial development should be open to clergy with PTO, particularly when a training need has been identified as a result of ministerial review or if it is required for their ministry.

12.2 The Bishop must provide appropriate CMD for all clergy who are licensed unless they hold their licence in conjunction with a contract of employment.

## **13 Disciplinary and capability procedures**

13.1 All clergy in holy orders (whether or not they hold a licence or have permission to officiate) 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. However, in the case of serious misconduct, the bishop might wish to pursue the Clergy Discipline Measure option so that a prohibition can be imposed.

13.2 Clergy who hold offices under common tenure are subject to the capability procedure.

## **14 Child and adult safeguarding**

14.1 The appropriate criminal record checks with the Disclosure and Barring Service should be carried out in every case. Failure to do so may be a disciplinary offence.

14.2 The bishop should in all cases require all retired clergy to undertake appropriate diocesan safeguarding training within the previous year before granting permission to officiate or a licence. It will be a disciplinary offence not to attend

safeguarding refresher training in the diocese when requested by the bishop. This will generally be every three years or so.

14.3 Retired clergy must abide by Church of England and diocesan policies and procedures in safeguarding children and adults, and observe the implementation of procedures in the parishes in which they serve.

14.4 Retired clergy are accountable to and must share information with the incumbent/priest in charge of the parish, or in a vacancy with the Area/Rural Dean or Archdeacon, on all safeguarding matters.

14.5 Retired clergy are subject to the same processes as any other ordained person in the event of an allegation of past or current abuse by a child or an adult being made against them.

14.6 In the event of a retired cleric or his or her dependants becoming a vulnerable adult, advice can be sought from the Diocesan Safeguarding Adviser.

## **15 Representation**

15.1 Retired clergy who are licensed to a parish have ex-officio membership of their PCC and deanery synod.

15.2 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.

15.3 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.

15.4 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.

15.5 It is recommended that all deaneries, at least occasionally, have a meeting to which all with a permission to officiate or licence are invited.

15.6 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. Where a cleric with PTO has been elected to the deanery synod, it is appropriate for them to be co-opted onto the PCC.

## **16 Communications**

16.1 It is suggested that retired clergy with PTO 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.

## **17 The (Ecclesiastical Offices) Age Limit Measure 1975**

17.1 The Ecclesiastical Offices (Age Limit) Measure 1975, as amended by the Ecclesiastical Offices (Terms of Service) Measure and Regulations 2009, requires all officeholders (including priests in charge) to vacate their office at 70 years of age. Unless office holders are in an appointment designated as fixed or limited term under regulation 29 of the Ecclesiastical Offices (Terms of Service) Regulations 2009, they may continue in post until 70. They may retire before 70, provided that they give three months' notice.

17.2 Where the archbishop or diocesan bishop considers that the pastoral needs of the parish or the diocese make it desirable and (if applicable) the PCC gives its consent, the Age Limit Measure permits an archbishop or bishop to extend the term of office for a limited period (up to one year for bishops, deans, residentiary canons and archdeacons, and up to two years in the case of incumbents or team vicars). Please note that this only applies to the offices specifically mentioned in this paragraph.

17.3 The retirement age should not be confused with the age (now 68) at which it is possible for clergy to retire on pension without any reduction in retirement benefits for early retirement.

17.4 Clerics over 70 may be appointed to any licensed post (i.e. any post other than as incumbent) for a fixed or limited term (which may be renewed) under Regulation 29 (1) (b) of the Ecclesiastical Offices (Terms of Service) Measure and Regulations 2009. For further information, see Appendix III.

## **18 Further ways of supporting the ministry of retired clergy**

18.1 Bishops may find it useful to bear the following in mind.

### *At the time of retirement*

18.2 At the time of retirement, the bishop will probably wish to consider how to express the diocese's appreciation of the retiring cleric's ministry, for example, by meeting the cleric or writing him or her a personal letter to thank them for their ministry. It may be helpful to offer life membership of the Retired Clergy Association.

18.3 If the cleric is moving to another diocese, the bishop should ask the cleric's permission to notify the bishop of the new diocese. It might also be helpful to ensure that people in the diocese are made aware that the cleric has moved to another diocese.

### *Subsequently*

18.4 The Bishop should encourage the work of retirement officers and appoint deanery visitors. See Appendix 1.

18.5 Many retired clergy will wish to participate in the annual renewal of ordination vows, and should be encouraged to do this.

18.6 Bishops are encouraged to offer the opportunity for 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. Other social events may be organised if there is interest.

18.7 It may also be desirable to encourage the retirement officers and visitors to ensure that there is celebration and appropriate marking of milestone birthdays and significant anniversaries.

## 19 Additional resources

Advice on the deployment of clergy with licences and permission to officiate

Protecting All God's Children (4<sup>th</sup> Edition (2010))

Promoting a Safe Church: House of Bishops' policy for safeguarding adults in the Church of England: CHP GS Misc 837 (2006)

Responding to Domestic Abuse (2006)

Responding Well to those who have been sexually abused (2011)

All the abovementioned policy documents can be found on the Church of England website:-

<http://www.churchofengland.org/clergy-office-holders/child-protection-safeguarding.aspx>

The Parochial Expenses of the Clergy: CSA Booklet, available from Payroll Services

<http://www.churchofengland.org/clergy-office-holders/clergypay.aspx>

Church of England Pension Scheme Members' Booklet: CEPB Guidance, available from the Pensions Board <http://www.cofe.anglican.org/about/cepb/>

Retired Clergy Association - the Revd David Phypers, 15 Albert Road, Chaddesden, Derby DE21 6SL [david@phypers.co.uk](mailto:david@phypers.co.uk)

Guidance on parochial fees issued by the Archbishops' Council issued in 2012

<http://www.churchofengland.org/weddings-baptisms-funerals/fees.aspx>

## 20 Appendices

Appendix I –The role of retirement officer and Clergy widow and widowers officer

Appendix II - Sunday service information

Appendix III- Guidance for clergy on ministry in retirement



### **The role of clergy retirement officers and clergy widows and widowers officers**

Bishops should ensure that appropriate provision is made for the pastoral care of retired clergy and their families, including separated/divorced spouses, widows, widowers and civil partners of deceased clergy<sup>2</sup>.

The pastoral care of the retired clergy and their spouses and civil partners is primarily the responsibility of the parish clergy. The clergy retirement officer (CRO) is to assist with this by providing good communication with the Bishop on behalf of the clergy, and with the area deans and the Pensions Board.

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, widow(er) or civil partner. Any associated expenses should be fully reimbursed.

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).

The retirement officers will encourage retired clergy to register details of their next of kin (including the address) with the bishop's office where it will be kept securely.

Parish clergy should refer all cases of sickness, bereavement, financial or other needs 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. The Pensions Board may also be able to help.

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;
- contact retired clergy soon after their arrival in the area, welcome them and explain the various networks, contacts, available grants, Synodical representation, Continuing Ministerial Development (CMD) opportunities etc.;
- maintain close contacts with the Retired Clergy Association, usually through its council members who are responsible for a specific area;
- work closely with the staff of the Pensions Board.

For model role descriptions for clergy retirement officers and clergy widows and widowers officers, see below.

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<sup>2</sup> In collaboration, where appropriate, with the bishops' visitors with specific responsibility in relation to clergy divorce

## Clergy retirement officer: model role description

*The job description below is based on material provided by the Liverpool CRO, the Revd John Burgess, in 2007.*

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.

- 1 The CRO works with the visitors as appointed by the bishop, and will chair the visitors' meeting in the absence of the bishop.
- 2 The CRO shall encourage the work of the Retired Clergy Association.
- 3 The CRO shall maintain good links with the Pensions Board especially in the event of bereavement, changes of address and changes in circumstances such as ill health (both mental and physical) and disability. When there are queries re: housing or other matters, the CRO may need to liaise on behalf of the pensioner with the Pensions Board who may be able to signpost individuals to local resources and support and keep a watching brief locally.
- 4 The CRO must work very closely with the widows and widowers officer (for whom there is a separate role description: see below).
- 5 The CRO should maintain a full, regularly updated address list of all clergy spouses and civil partners, who have given their consent for the Pensions Board to pass on this information, including
  - NSMs and OLMs who have reached pensionable age, retired from their paid employment, and relinquished the bishop's licence
  - separated and divorced spouses and civil partners
  - clergy living outside the diocesan boundaries who minister within the diocese with the bishop's permission to officiate.
- 6 The CRO should communicate changes in the address list 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. The Pensions Board will provide dioceses with an update every six months, along with monthly notification of the names of those who have died.
- 7 The CRO arranges for charitable grants to be paid clergy at any time, for example for training and for clergy and widows in particular financial need, and should be familiar with what the Church charities can offer.
- 8 The CRO can access advice from the Diocesan Safeguarding Adviser where retired clergy or their dependants become vulnerable and may need referral to support services.
- 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.
- 14 Retirement officers may wish to organise a follow up retirement course 6 – 18 months after retirement

## **Clergy widows and widowers officer: model role description**

*The job description below is based on material provided by the Liverpool CRO, the Revd John Burgess, in 2007.*

**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, but it is helpful to keep area deans informed.**

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, and 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.

**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**

## Appendix III

### Guidance for clergy on ministry in retirement

1. Retirement can involve an enormous change in the lives of clergy. 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, some experience a sense of loss, similar to bereavement. Some may also suffer from their loss of position or 'status': they were automatically leader of a ready made community, and are no longer looked to for leadership and help in the way that they were. 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.
2. 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. It is hoped that this guidance will be useful to clergy considering ways in which they might exercise a ministry in retirement.
3. 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 their successor to develop their new ministry without feeling inhibited by their predecessor and the parishioners to establish a relationship with their new priest.
4. There are many things that a retired cleric can do, not directly connected with the diocese, or requiring a licence or permission to officiate. 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. 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, or be coerced into taking on duties against their wishes.
5. A cleric who wishes to continue his or her ministry after retirement will need either a licence or permission to officiate from the diocesan bishop. See the *Advice on the deployment of clergy with licences and permission to officiate*.

6. Clergy wishing to exercise a public ministry in retirement should remember the following.
  - The purpose of all ministry is to further the Kingdom, not to affirm the status of the minister or keep people feeling busy in retirement. Retired clergy do not have an automatic right to preach or preside at the Eucharist, nor is this necessary to be true to their priestly ordination.
  - On reaching retirement age, they do not have a right to hold office in order to increase their pension provision or give access to provided housing after retirement
  - Clergy on PTO carry out their ministry at the invitation of the incumbent or priest in charge, who may decide what ministry, if any, a retired cleric should have in the parish and the retired cleric must respect this.
  
7. As part of the retirement process, the Pensions Board seeks consent from retired clergy for their addresses to be passed to retirement and widow(er)s officers. It provides updated lists every six months.
  
8. If retired clergy move to a new diocese, they may find it helpful to take the contact the bishop or a retirement officer if they have not heard from them and wish to have a ministry. A meeting with the bishop or member of his senior team to discuss the level of ministry that the cleric is able to offer may be helpful.
  
9. Answers to some frequently asked questions are provided below.

### **1. When am I required to retire?**

Clergy office holders (both in common tenure appointments and freehold appointments that started after 1 January 1976) have a statutory retirement age under the Ecclesiastical Offices (Age Limit) Measure 1975. This requires them to retire from the office they hold on attaining 70.

### **2. What if I wish to continue in office beyond 70?**

Regulation 29(1) b of the Ecclesiastical Offices (Terms of Service) Measure allows a bishop to licence an office holder who is over the age of 70 to any post for which the bishop's licence is sufficient authorisation. The licence must be for a fixed or limited term, or expire on the occurrence of a specified event, although it may be renewed or extended. The purpose of this provision is to enable those who wish to continue

to work beyond the age of 70 to do so, where there is an appropriate place for them to use their talents, but with an inbuilt mechanism to enable both the bishop and the office holder to review the position at stated intervals. This is a means of enabling people who still have a ministry to offer the Church to do so and is not intended to be a means of enhancing pension provision or keeping people busy in retirement.

### **3. Can I continue to receive a stipend after reaching 70?**

Yes. If your post is stipendiary, you may continue to receive a stipend after reaching 70 under the provisions in paragraph 2.

### **4. Can I continue to accrue pensionable service after reaching 70?**

Provided that you have not already retired and opted to receive your pension, you will continue to accrue pensionable service as long as you are in a stipendiary post until you have accrued the maximum benefits under the scheme.

### **5. If I am already receiving a pension, is it possible to be paid a stipend in addition?**

Clergy in receipt of pension may be appointed to regulation 29 posts and receive a stipend if the post is stipendiary<sup>3</sup>. However, you are unable to accrue more pensionable service under the clergy pension scheme, because you are already receiving pension.

If you are not accruing pensionable service in the clergy pension scheme (the Church of England Funded Pension Scheme – CEFPS), the payment of stipend (or a housing allowance) may, however, result in your being automatically enrolled into a pension scheme if you fulfil certain eligibility conditions although you will be able to opt out if you do not want to make further pension contributions.

If you are not automatically eligible, you may also have the right to opt-in to the automatic enrolment compliant pension scheme operated on behalf of stipendiary clergy not entitled to accrue further pensionable service in CEFPS.

### **6. I am an incumbent. What if I wish to remain in my current office after 70?**

Where the archbishop or diocesan bishop considers that the pastoral needs of the parish or the diocese make it desirable and (if applicable) the PCC gives its consent, the Age Limit Measure permits an archbishop or bishop to extend the term of office

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<sup>3</sup> Subject to a clear break between the last period of stipendiary pensionable service and any post-retirement stipendiary service

for a limited period (up to one year for bishops, deans, residentiary canons and archdeacons, and up to two years in the case of incumbents or team vicars).

This means that incumbents (whether on common tenure or in freehold offices subject to the Age Limit Measure) may not continue **as incumbents** beyond the age of seventy for longer than two years. However, they may in appropriate circumstances, be licensed to the benefice (for example as associate priest) for a fixed term under regulation 29 (1) (b). However, this would require the presentation to be suspended, and, therefore, the agreement of the patron.

### **7. What if I wish to remain in my current office after 70, and I am in a licensed post?**

A priest in charge could be relicensed to the benefice for a fixed term under regulation 29 (1) (b) once he or she reached 70.

### **8. What if I am on a contract of employment?**

Clergy who are on contracts of employment, unlike office holders, have the same rights as other employees. They may not be compulsorily retired on grounds of age, and may continue in employment after they reach pension age.

### **9. If I am an employee, must the bishop revoke my licence at 70 even though I am required to have a valid licence in order to carry out my job and this has the effect of preventing me from continuing in employment?**

The bishop is required to bring your licence to an end at 70, but he may then issue you with a new licence either for a fixed term (but renewable) or one that will expire whenever you retire from your employment.

### **10. What if I am under 70, but have retired on pension and want to take up a stipendiary post?**

You may take up a post (whether stipendiary or not) but will be required to relinquish it at 70. However, depending on the circumstances, the bishop may agree to extend your appointment for a limited period (see above) or to grant you a new appointment for a fixed term under regulation 29 (1) (b).

### **11. If I have ceased office at 70 and wish to keep accruing pension and obtain a stipendiary post under regulation 29, may I defer taking my pension?**



The general rule is that pension would come into payment once someone has reached the age of 68 and ceases service in a post that would be pensionable under the scheme. However, there might be scope, in exceptional circumstances, for regarding the service as continuous, where the gap between ceasing in one post and starting another was not more than 3 months. This would be subject to the discretion of the Pensions Board.

## **12. What is the age at which I am eligible to receive pension?**

The age under which clergy are required to retire should not be confused with the scheme pension age. The pension scheme's "normal pension age" (the age from which benefits can be paid without any reduction for early payment) is now 68 in respect of pensionable service completed from 1 January 2011. Benefits earned before that date retain a "normal -pension age" of 65, and would not be reduced if taken at or after that age. The rules of the scheme require members:

1. to have resigned from their post or position before they can draw benefits (although this will not necessarily prevent them subsequently being paid a stipend in a regulation 29 post at a later point)
2. to draw all their benefits at the same time, e.g. members who choose to retire at 65 would be required to take any benefits earned from 1 January 2011 as a pension and lump sum reduced for early retirement

This does not affect members' rights to retire at any age after 55 with an appropriate reduction to their benefits.

## **13. Will my pension be reduced if I receive other earnings?**

Pensions in payment may not be reduced or suspended if a pensioner receives earnings from ecclesiastical office or employment (including offers of remuneration for carrying out occasional offices).

June 2014