

# DIOCESE OF TRURO

## Clergy Handbook

September 2025

Dear brothers and sisters,

I'm very happy to commend this Clergy Handbook to you: I hope and pray it will be a really valuable resource for you in your ministry. It's intended to be a sort of 'one stop shop' providing practical advice and guidelines on a number of issues specific to the exercise of ordained ministry - it's definitely meant to be a helpmate and not a straightjacket! It's also always a work in progress and we would welcome feedback on its content, and suggestions for its development.

In February 2020, General Synod approved 'A Covenant for Clergy Care and Wellbeing'. It's worth quoting some of that Covenant, because I see this document as an expression (albeit a small one) of that commitment:

*In its formularies, the Church of England recognises that God calls men and women to serve as deacons, priests and bishops to build up and equip the whole People of God. Conscious that such a calling is both a privilege and a demand, we as the Church of England commit together to promote the welfare of our clergy and their households in terms expressed in the Covenant for Clergy Care and Wellbeing.*

*We undertake to work together to seek to coordinate and improve our approach to clergy care and wellbeing that ordained ministers flourish in their service of the mission of God within and beyond the Church.*

It is certainly my prayer that we each of us, and all of us, as ordained ministers, will flourish in the service of the mission of God, here in our Diocese of Truro.

And may our God bless you in all you do to serve him, his Church and his world,

+David

|   |           |
|---|-----------|
| <b>INTRODUCTION.....</b>                                | <b>6</b>  |
| <b>1 EQUITY, DIVERSITY AND DIGNITY .....</b>            | <b>7</b>  |
| 1.1 POLICY STATEMENT .....                              | 7         |
| 1.2 BULLYING AND HARASSMENT POLICY .....                | 7         |
| <b>2 STARTING A CLERGY ROLE .....</b>                   | <b>11</b> |
| 2.1 CLERGY RECRUITMENT .....                            | 11        |
| 2.2 TERMS OF OFFICE .....                               | 11        |
| 2.3 STATEMENT OF PARTICULARS .....                      | 11        |
| 2.4 ROLE DESCRIPTION .....                              | 12        |
| 2.5 INDUCTION .....                                     | 12        |
| 2.6 ACOMMODATION AND HOUSING.....                       | 12        |
| 2.7 FIXED TERM APPOINTMENTS.....                        | 12        |
| Annex 2a: CLERGY HOUSING POLICY .....                   | 14        |
| <b>3 DAY TO DAY ARRANGEMENTS .....</b>                  | <b>19</b> |
| 3.1 CHANGES IN PERSONAL DETAILS AND CIRCUMSTANCES ..... | 19        |
| 3.2 STIPENDS, EXPENSES AND PAYMENTS .....               | 19        |
| 3.3 DIOCESAN AND SYNOD DUTIES .....                     | 19        |
| 3.4 PUBLIC DUTIES .....                                 | 19        |
| <b>4 HEALTH, SAFETY AND SECURITY.....</b>               | <b>20</b> |
| 4.1 PERSONAL SAFETY AND SECURITY .....                  | 20        |
| 4.2 HEALTH AND SAFETY .....                             | 20        |
| 4.3 SAFEGUARDING .....                                  | 21        |
| <b>5 FAMILY POLICIES .....</b>                          | <b>22</b> |
| 5.1 INTRODUCTION.....                                   | 22        |
| 5.2 MATERNITY LEAVE AND PAY.....                        | 22        |
| 5.3 ADOPTION LEAVE AND PAY .....                        | 28        |
| 5.4 PATERNITY LEAVE AND PAY .....                       | 29        |
| 5.5 SHARED PARENTAL LEAVE .....                         | 30        |
| 5.6 PARENTAL LEAVE.....                                 | 32        |
| 5.7 DEPENDANTS' LEAVE .....                             | 33        |
| 5.8 CHILD PLACEMENT AND FOSTERING .....                 | 34        |
| <b>6 WELFARE AND WELLBEING.....</b>                     | <b>37</b> |
| 6.1 WELLBEING PRINCIPLES .....                          | 37        |
| 6.2 SICKNESS ABSENCE .....                              | 37        |
| 6.3 ANNUAL LEAVE AND REST DAYS .....                    | 43        |
| 6.4 BEREAVEMENT, COMPASSIONATE AND EMERGENCY LEAVE..... | 44        |

|           |  |           |
|-----------|--|-----------|
| 6.5       | MENOPAUSE POLICY .....                                     | 45        |
| 6.6       | TRADE UNION OR PROFESSIONAL ASSOCIATION MEMBERSHIP .....   | 48        |
| Annex 6a  | Self-Certificated Sick Absence Form (Clergy).....          | 49        |
| Annex 6b  | Confidential support services .....                        | 50        |
| Annex 6c  | Clergy menopause checklist guidance .....                  | 51        |
| Annex 6d  | Further menopause support and information.....             | 52        |
| <b>7.</b> | <b>PERSONAL AND MINISTERIAL DEVELOPMENT .....</b>          | <b>53</b> |
| <b>8</b>  | <b>DISCIPLINE AND CONDUCT .....</b>                        | <b>54</b> |
| 8.1       | CONDUCT .....  | 54        |
| 8.2       | FOLLOWING UP CONCERNS .....                                | 54        |
| 8.3       | CLERGY DISCIPLINE MEASURE .....                            | 60        |
| <b>9</b>  | <b>GRIEVANCE PROCEDURE .....</b>                           | <b>62</b> |
| <b>10</b> | <b>CAPABILITY .....</b>                                    | <b>66</b> |
| <b>11</b> | <b>WHISTLEBLOWING .....</b>                                | <b>69</b> |
| <b>12</b> | <b>IT AND COMMUNICATIONS .....</b>                         | <b>70</b> |
| 12.1      | DATA PROTECTION AND IT SECURITY.....                       | 70        |
| 12.2      | DEALING WITH THE MEDIA .....                               | 71        |
| 12.3      | SOCIAL MEDIA GUIDELINES.....                               | 72        |
| ANNEX 12a | Social media: guidelines and tips .....                    | 73        |
| <b>13</b> | <b>CURATES.....</b>  | <b>75</b> |
| 13.1      | INTRODUCTION.....  | 75        |
| 13.2      | STATEMENT OF PARTICULARS .....                             | 75        |
| <b>14</b> | <b>HOUSE FOR DUTY CLERGY .....</b>                         | <b>77</b> |
| 14.1      | INTRODUCTION.....  | 77        |
| 14.2      | OVERVIEW .....   | 77        |
| 14.3      | COMMITMENTS AND WORKING AGREEMENTS .....                   | 77        |
| 14.4      | EXPENSES AND FEES .....                                    | 78        |
| 14.5      | HOLIDAYS AND TIME OFF .....                                | 78        |
| 14.6      | SICKNESS AND ABSENCE .....                                 | 78        |
| 14.7      | OPPORTUNITIES FOR CONTINUING MINISTERIAL DEVELOPMENT ..... | 79        |
| <b>15</b> | <b>SELF-SUPPORTING CLERGY (SSMs).....</b>                  | <b>80</b> |
| 15.1      | INTRODUCTION.....  | 80        |
| 15.2      | COMMITMENTS AND WORKING AGREEMENTS .....                   | 80        |
| 15.3      | FAMILY FRIENDLY POLICIES AND GUIDELINES .....              | 80        |
| 15.4      | EXPENSES AND FEES .....                                    | 81        |
| 15.5      | HOLIDAYS AND TIME OFF .....                                | 81        |

|   |           |
|---|-----------|
| 15.6 SICKNESS AND ABSENCE .....   | 81        |
| <b>16 LEAVING OR ENDING A CLERGY ROLE .....</b>   | <b>82</b> |
| 16.1 RESIGNATION .....  | 82        |
| 16.2 END OF CONTRACT .....  | 82        |
| 16.3 REMOVAL FROM OFFICE .....  | 82        |
| 16.4 PASTORAL REORGANISATION .....  | 82        |
| 16.5 RETIREMENT .....   | 82        |
| 16.6 SPECIAL AGREEMENTS .....   | 83        |
| 16.7 DEATH IN OFFICE .....  | 83        |
| <b>ANNEX 16a: WHEN CLERGY CHOOSE TO MOVE - POLICY AND GUIDANCE FOR<br/>“SPECIAL AGREEMENTS” .....</b> | <b>86</b> |

## INTRODUCTION

1. This handbook aims to provide a one-stop resource for licensed clergy who have any queries about everything from their appointment to rights, accountabilities and responsibilities. It is available on our website [here](#).
2. Information is grouped into a range of sections as indexed below, and will be updated regularly, so we do recommend that if you need to keep a hard copy you also check the website to ensure you have the most up to date version of the section you need. Your Archdeacon, or HR at Church House, can provide further advice and guidance.
3. In this handbook the terms 'The Diocese' and 'we' are referred to. This is convenient shorthand for the Bishop, the Episcopal College, and other professionals and members of staff who have delegated roles in working with the churches and people in the parishes of the Diocese of Truro.
4. This handbook is for those clergy engaged under Common Tenure terms. The [Ecclesiastical \(Terms of Service\) Measure](#), became law across the Church of England in 2011. Some of the regulations have been updated since then ([see here](#)). Separate guidance is available for:
  - Public preachers;
  - Those clergy with permission to officiate (PTO) in the Diocese; and
  - Lay readers

# 1 EQUITY, DIVERSITY AND DIGNITY

## 1.1 POLICY STATEMENT

### 1.1.1 We will work to:

- ensure that individuals are treated fairly, with dignity and respect, regardless of their race, colour, nationality or ethnic or national origins, disability, age, gender, spent criminal convictions, faith or religious beliefs, social background, part time or fixed term employment, sexual identity or marital status;
- create an enjoyable, inclusive and supportive working environment and culture that recognises diversity and enables everyone to contribute fully and reach their potential.
- ensure that parishes are trained so that their recruitment and selection processes are carried out in the spirit of fairness, honesty and integrity, conscious always of the reverence we should have for one another, and for the power of the Holy Spirit who informs and guides us all;
- ensure that training and development opportunities are available to all without unfair discrimination within our resources; and
- take positive action to ensure equality of opportunity and of treatment on the matters specified above throughout our sphere of influence, and in so far as it lies within our power. The Episcopal College will monitor our progress in implementing this policy and track progress across any areas in which we fall short.

### 1.1.2 It is the responsibility of all clergy, staff, Board and committee members, both paid and voluntary, to abide by and to promote this policy, and any grievance, or other matter relating to it, should be taken up, in accordance with the relevant policy procedure (see Sections 9 and 11).

## 1.2 BULLYING AND HARASSMENT POLICY

### Introduction

*“The Church is required by God to foster relationships of the utmost integrity, truthfulness and trustworthiness. Abuse, harassment and bullying will not be tolerated within the Church of England. All complaints of abuse, harassment and bullying are to be taken seriously and thoroughly investigated.”* House of Bishops 2001.

### 1.2.1 Many people in our society are victimised and harassed and bullied as a result of their race, colour, ethnic or national origin, religious belief,

political opinion or affiliation, sex, marital status, sexual orientation, gender reassignment, age or disability.

- 1.2.2 Personal harassment and bullying takes many forms ranging from tasteless jokes and abusive remarks to pestering for sexual favours, intrusive and threatening behaviour and actual physical abuse. Whatever form it takes, personal harassment and bullying are totally unacceptable.
- 1.2.3 Personal harassment and bullying can exist in our churches, and local communities, and this can seriously affect relationships and working lives by interfering with their job performance or by creating a stressful, intimidating and unpleasant environment. It is offensive in itself and profoundly unacceptable in communities that profess the belief that we are all made in the image of God and all called to share the life of Christ.
- 1.2.4 The legal position of issues relating to bullying and harassment is covered through several pieces of legislation.
- 1.2.5 The Diocese will take seriously - and investigate - any complaint made regarding bullying and harassment.

### **Policy**

- 1.2.6 All forms of personal harassment and bullying are deplored and the Episcopal College and TDBF will seek to ensure that the environments within the sphere of our control are sympathetic to all our clergy, Readers, and those clergy who have been employed centrally.
- 1.2.7 These procedures have been included in this Handbook to reinforce all the types of behaviour that are unacceptable, and to provide those who are the victims of personal harassment and bullying with a means of redress through appropriate process. Where appropriate, disciplinary action will be taken.

### **Examples of personal harassment and bullying**

- 1.2.8 Personal harassment and bullying take many forms, including mail, email, telephone conversations, etc, and individuals may not always realise that their behaviour constitutes harassment or bullying. Personal harassment is unwanted behaviour by one individual towards another and examples of harassment include:
  - insensitive jokes and pranks
  - lewd or abusive comments about appearance
  - deliberate exclusion from conversations
  - displaying abusive or offensive writing or material
  - unwelcome touching and/or attention
  - abusive, threatening or insulting words or behaviour.

**1.2.9** Bullying is a form of psychological harassment. It is intimidation that serves to undermine self-esteem, confidence, competence, effectiveness and integrity. Examples of bullying include:

- continual, undeserved criticism
- arbitrary and inconsistent demands
- imposition of unreasonable deadlines
- shouting, swearing and offensive language
- displaying overbearing or intrusive behaviour.

These lists are not exhaustive.

### **Informal Process**

**1.2.10** Complaints of bullying or harassment, particularly of sexual harassment, can sometimes be of a sensitive or intimate nature and difficult to challenge.

**1.2.11** An individual is encouraged to raise such issues in the first instance with a colleague of their choice as a confidential helper. This person may be for example the Diocesan Director of Ordinands (DDO), a Rural Dean, a senior or other local colleague or, where appropriate, an Archdeacon.

**1.2.12** If an individual is the victim of what they perceive to be minor harassment or bullying they can, on their own or with the assistance of a confidential helper, make it clear to the harasser on an informal verbal basis that their behaviour is unwelcome, and they are being asked to stop.

**1.2.13** Through due and fair processes, the Diocese will always seek to work with individuals informally in the first instance to try and achieve an informal resolution (sometimes using trained mediators), and encourage people to meet, share feelings, and give opportunities for apologies to be given and reconciliation achieved.

**1.2.14** If this is not possible, a written request to the harasser may be appropriate and, if they are supported by someone as their confidential helper, they can assist with this also.

**1.2.15** Where an informal approach is not possible or appropriate, a formal approach may be required.

### **A Formal Complaint**

**1.2.16** Where the informal approach fails or if the harassment or bullying is more serious, the individual should bring the matter to the attention of their Archdeacon as soon as possible verbally, and/or by formal written complaint (again the confidential helper can assist with this). If the complaint is about an Archdeacon, the complaint should be sent to the Bishop.

**1.2.17** If possible, it's a good idea to keep notes or a diary of the harassment or bullying so that the written complaint can include:

- the name of the alleged harasser or bully;
- the nature of the alleged harassment or bullying;
- the dates and times when the alleged harassment or bullying occurred
- the names of any witnesses; and
- any action already taken by you to stop the alleged harassment or bullying.

**1.2.18** On receipt of a formal complaint the Archdeacon will arrange to meet with the individual to investigate their allegations and discern the most appropriate series of next steps. Depending on the nature of the complaint, and the resources available, the Archdeacon may ask another Archdeacon, HR representative, or an independent member of the Episcopal College to assist with investigation or undertake it. However, anyone dealing with a grievance raised by any person holding office must have regard to the Code of Practice as set out under Section 5 of the Ecclesiastical Offices (Terms of Service) Measure 2009 and Regulation 32(1) of the Ecclesiastical Offices (Terms of Service) Regulations 2009.

**1.2.19** Full details of the grievance procedure can be found in Section 9. You can also find more information on the Church of England website [here](#).

## 2 STARTING A CLERGY ROLE

### 2.1 CLERGY RECRUITMENT

2.1.1 Recruiting a new priest for a parochial role is an exciting new time for parishes. It also comes with processes of:

- information gathering
- liaising with patrons
- working with the Archdeacon and other diocesan officers where appropriate
- producing a clear roles and responsibilities document.
- producing a profile and a clear Statement of Needs document
- advertising
- shortlisting
- interviewing and recruiting processes
- discerning the right person
- new clergy moving in, licensing, induction and support; and
- who does what, when and how, during the period of Transition.

2.1.2 Parishes are expected to follow the guidance set out in “A Changing Season - Flourishing in a time of Transition” and in the “Parish Safeguarding Handbook” recruitment section. These both contain information and advice for parishes, from the start to end of the process. They must also follow the Church of England Safer Recruitment and People Management Guide.

### 2.2 TERMS OF OFFICE

2.2.1 Since 2011, clergy office holders have been appointed under Common Tenure (see the Ecclesiastical Offices (Terms of Service) Measure 2009 [here](#)). You will be issued with a Statement of Particulars (SoP) when, or soon after, you start your role that sets out the terms of your office, but some FAQ are [here](#).

### 2.3 STATEMENT OF PARTICULARS

2.3.1 Whenever a new appointment is made, regardless of whether the individual is coming into the diocese from another, or moving within the diocese a new Statement of Particulars (SoP) will be issued.

2.3.2 The SoP sets out the minimum legal terms and conditions on which the appointment is to be made, any enhancements we have made to these, and will include (as appropriate for self-supporting and stipendiary clergy):

- The details of the entitlement to stipend, fees, and reimbursement of expenses
- Terms and conditions relating to leave and rest periods (including annual leave entitlement, Sundays on which leave may be taken, and the public and special leave days on which leave may not be taken)
- Terms and conditions relating to sickness absence

- Pension provision
- Statutory rights (including maternity, paternity, parental and adoption leave)
- Right to time off to care for dependents
- The right to a monthly stipend statement
- Links to the processes, guidelines and policies which underpin the roles and responsibilities of clergy within the diocese

2.3.3 Any queries relating to your SoP should be discussed in the first instance with your Archdeacon or with the Diocesan HR team.

## 2.4 ROLE DESCRIPTION

2.4.1 On appointment, or within the first few months, the role description used to recruit to the role will be confirmed or revised as needed between you and your Archdeacon (or Rural Dean). This will normally then inform (and be amended by) subsequent Ministerial Development Reviews.

## 2.5 INDUCTION

2.5.1 Your Archdeacon and Rural Dean (where existing) are responsible for inducting you into the diocese (where relevant) and your role. Your PCC(s) and Churchwardens are responsible for ensuring you are welcomed into their community and working with you to help you to settle into your new role as quickly as possible.

## 2.6 ACCOMMODATION AND HOUSING

2.6.1 Where there is a requirement to live in a Diocese property, [The Property Handbook](#) sets out guidance and responsibilities in relation to this.

2.6.2 The Diocese has its own housing policy (see Appendix 2a) that enables clergy to make an application to live in an alternative property and under what circumstances a housing allowance may be payable if an office holder lives in their own or other accommodation.

## 2.7 FIXED TERM APPOINTMENTS

### Introduction

2.7.1 Under the Terms of Service Measure, clergy appointments may be made on a fixed term basis for any of the following reasons:

- Those on a short to medium term appointment covering sickness or other reason for another post holder's absence from work;
- Clergy who are over 70 years of age;
- Those in training posts (and who must complete their 4-year training period);
- Posts with designated time-limited funding or sponsorship;
- Posts created by a Bishop's Mission Order under the Dioceses, Pastoral and Mission Measure; or

- for other reasons where an interim appointment is appropriate (up to a maximum of three years) in line with Church of England guidance for interim posts here.

**2.7.2** In all cases of fixed term appointments, known as Qualified Common Tenure, the candidate will be clear from the outset of the reasons for the fixed term nature of the appointment, of their rights at the end of the appointment, and of the responsibility of the diocese.

### **Appointment Status**

**2.7.3** Under secular employment law the rights of individuals on fixed term arrangements (Fixed Term Employees Prevention of Less Favourable Treatment Regulations 2002) ensures that all on fixed term contracts have clear rights. The Diocese extends the spirit of these rights to all our fixed term clergy in terms of access to support, training, and development.

**2.7.4** Fixed term clergy will not be treated less favourably than comparable permanent clergy on the grounds that they are only licensed on a fixed term basis unless this can be objectively justified.

**2.7.5** It is therefore important that fixed term appointments are used appropriately. Under Qualified Common Tenure, where a post can be specifically for a fixed term, Statements of Particulars will always set out the reasons for the post being fixed term and have a specific end date.

**2.7.6** Prior to the end of a post the Diocesan HR team or the Archdeacon's office will be in touch with the individual concerned to offer appropriate HR support.

**2.7.7** Where the post ending is a curacy, the guidelines for completing the curacy will be followed, see section 11.

### **Appointing to a fixed term post**

**2.7.8** Following the processes set out in recruitment guidelines, candidates for clergy appointments must be made aware of, and show that they understand, that the post is a fixed term post, for how long, and the reason(s) why, along with any appointments in place where a post is covering for a permanent member of clergy.

**2.7.9** Fixed Term Regulations require employers to offer access to the occupational pension scheme on the same basis as permanent individuals, so fixed term clergy are automatically enrolled into the Church Commissioners Clergy Pensions Scheme.

### **Reviewing or Extending Fixed Term arrangement**

**2.7.10** Where a fixed term appointment is to be extended this will be for a further defined period, with the reasons and new date explained and agreed. To confirm any arrangement, a revised Statement of Particulars will be agreed.

## Annex 2a: CLERGY HOUSING POLICY

### 1. INTRODUCTION

1.1 This policy sets out our:

- Guidance and rules relating to the provision of clergy housing;
- How the circumstances in which agreement to living in property other than that provided by the Diocese will be made; and
- The housing allowance that may be paid.

1.2 It forms part of our commitment to clergy wellbeing, transparency and equity relating to clergy terms and conditions, and good governance.

### 2. HOUSING POLICY

2.1 We are committed to following the Church of England “[Guidance on housing flexibility for clergy office holders \(April 2023\)](#)”. The areas where there is Diocesan discretion are covered below.

### 3. APPLYING TO LIVE IN ALTERNATIVE ACCOMODATION

3.1 As set out in the policy (see link above), the expectation is that most clergy office holders will live in a house provided for the better performance of the duties of the office held, unless there are good reasons for not doing so. In these cases, the Bishop may give their agreement for an eligible member of clergy to live in accommodation other than that being offered by the Diocese.

3.2 If the office holder wishes to request to live in another property of their choosing, they should first discuss the matter informally with their Rural Dean and Archdeacon and/or Diocesan Secretary, so that all parties are fully informed of the options. A formal request should then be made using the form at Annex A. An online version is available on request from Church House HR or Finance teams.

3.3 On receipt of the request, Archdeacon and Diocesan Secretary will decide whether to reject the application, or recommend it to the Bishop for approval or rejection, using the information supplied and the [guidance](#).

3.4 Any alternative arrangements to the provision of the official property:

- will be an exception rather than usual;
- require, if they do not live in the parish, the office holder still to have a base within the parish, whether this is an official house, or parish office.
- should enable the office holder to carry out their duties no less effectively than had they lived in the official accommodation;
- require the office holder to live reasonably close to, if not in, the parish and within reasonable travelling distance, of the benefice or parish boundary (whichever is appropriate);
- should facilitate recruitment to the role, and a good appointment to be made

- in the interests of parish, priest and diocese;
  - must not be disproportionately expensive or significantly financially disadvantageous for the diocese; and
  - will be made on a fair, transparent and equitable basis.
- 3.5 All clergy vacancies for which for stipendiary clergy for which accommodation is provided will be advertised on the basis that the successful candidate will normally be expected to occupy the official property as detailed in the particulars, but that application may be made to live elsewhere, subject to the Bishop's agreement, and in line with this policy.

#### **4. PROVISION OF HOUSING ALLOWANCE**

- 4.1 The payment of a housing allowance is separate to the above process. Approval to live in a property of the office holder's choice does not necessarily mean that a housing allowance will be paid, either in full or part, or at all. They are discretionary payments. However, we will treat all cases fairly and on merit.
- 4.2 Housing allowances are paid in addition to stipend as compensation for not receiving the usual benefit of housing. It is taxable in the same way as stipend. The formula will be recalculated annually as part of the budget process and the individual informed of any changes. The formula itself will be reviewed as and when required by the Diocesan Secretary, and changes will be approved by the Finance, Assets and Risk (FAR) Committee. Current housing allowances are paid at the rates set out in Annex B.
- 4.3 A housing allowance may be paid in the following circumstances:
- The Diocese property provided, or alternative offered, is unsuitable for the office holder or a member of their household for health and/or wellbeing reasons; and/or
  - The TDBF benefits financially significantly from the arrangements; or
  - There is clear evidence that the office-holder's role can be performed significantly more effectively with the new accommodation arrangements, and will not be adversely affected by them.
- 4.4 Where the office holder gives up the right to accommodation at the request of the diocese, a housing allowance will normally be paid.
- 4.5 Housing allowances will be pro-rata for part-time clergy.

#### **5. CONFIDENTIALITY**

- 5.1 There is often an expectation and desire by the parish for the office holder to live in the parish or benefice. If alternatives are agreed, care will be taken in communicating to the parish the reasons for this, and this should be agreed with the office holder, in order that confidentiality and privacy are not compromised.

August 2023

## APPLICATION TO LIVE IN ALTERNATIVE ACCOMODATION

### PART A (to be completed by clergy member)

Name:

Current role (or appointed role to take up):

Current property address:

Address of property you wish to move to or live in (if applicable):

I wish to (tick as applicable):

- ☐ move from the current provided accommodation
- ☐ not take up the accommodation being offered and remain in my current property
- ☐ not take up the accommodation being offered and live in a different property to my current property

The reason(s) for this are:

- ☐ to benefit my own physical and/or mental health and wellbeing
- ☐ to benefit the health and wellbeing of my family or household members
- ☐ financial
- ☐ I believe it will benefit my ministry
- ☐ other

Please expand on your reasons (referring to the guidance [here](#))

If your application is approved, you may be eligible for a housing allowance. If you would like to be considered for this additional payment, please tick here: ☐

Signed:

Date:

**PART B (to be completed by Rural Dean if appropriate)**

I support/do not support this application. Please expand on your answer below if necessary

**PART C (to be completed by Archdeacon)**

I support/do not support this application. Please expand on your answer below if necessary

Signed:

Date:

**PART D (to be completed by Diocesan Secretary)**

I support/do not support this application. Please expand on your answer below if necessary.

Signed:

Date:

**PART E (to be completed by the Bishop if the application is supported above)**

I approve/do not approve this application.

Signed:

Date:

**HOUSING ALLOWANCE**

NB. The housing allowance will be recalculated annually a part of the budget process and may go up or down depending on the factors used.

The maximum annual full time housing allowance (paid monthly and pro-rata for part-time clergy) as at 1 August 2023 is £12,000.

This is based on the following calculation:

**A. Housing Allowance Calculation**

|                                       | <u>£</u>      |
|---------------------------------------|---------------|
| Housing element of cost of ministry   | 11,150        |
| Less Council Tax (note 1)             | (2,500)       |
| Less Water charges (note 1)           | <u>(500)</u>  |
| Net costs to TDBF                     | <u>8,150</u>  |
| Rental income (notes 1 & 2)           | 11,520        |
| MMF contribution from parish (note 3) | <u>11,150</u> |
| Total income to TDBF                  | <u>22,670</u> |
| Net income to TDBF                    | £14,520       |
| Rounded down to                       | £1,000pcm     |

**Notes:**

1. Council Tax, water charges and rental income are averages, as per the budget.
2. Average income (£1,200 pcm) reduced by 20% to account for:
  - a. Tenancy occupancy rate assumed to be less than 100%;
  - b. Additional costs to be incurred for rental of property.
3. Housing element of cost of ministry included in unit cost in MMF toolkit (or previous year's collection rate).

### **3 DAY TO DAY ARRANGEMENTS**

#### **3.1 CHANGES IN PERSONAL DETAILS AND CIRCUMSTANCES**

- 3.1.1** As an ordained member of the Church of England you will have a unique personal number account (PUN) on the Church of England People System. Communications relating to this come direct from the National Churches Institutions (NCI) but it is important that you keep your personal details (e.g. bank details, phone numbers, email addresses, marital status, titles, qualifications, etc) up to date on the system.
- 3.1.2** You must also inform the appropriate person in the Information and Governance team in Church House of any change of contact details (i.e. address, phone, or email) so that the Diocesan database and online directory can be updated or amended and kept up to date.

#### **3.2 STIPENDS, EXPENSES AND PAYMENTS**

- 3.2.1** Information on stipends, expenses and payments is available in the [guide](#) produced by the Church of England regarding parochial clergy parish expenses. The information sets out guidelines for parochial clergy and PCC Treasurers about the reimbursement of expenses, how and where to claim and assign fees and expenses. More information is available [here](#).

#### **3.3 DIOCESAN AND SYNOD DUTIES**

- 3.3.1** The Bishop expects that clergy will play an active part in their Chapter and, of course, in Deanery synodical arrangements. Where clergy may have a national role e.g. General Synod, this is much encouraged. However if such a role impacts negatively on your parish role for any reason this will be discussed with you and the Bishop or Archdeacon.

#### **3.4 PUBLIC DUTIES**

- 3.4.1** As part of your parochial duties, you may hold various public duties such as school governor. Other duties such as roles in local government, or trade union duties for example, may require a review of your time in order to undertake these roles, as well as to be trained for them. You should consult your Archdeacon, or the Bishop, if you wish to undertake a national or local public or other professional role.

## 4 HEALTH, SAFETY AND SECURITY

### 4.1 PERSONAL SAFETY AND SECURITY

4.1.1 The Diocese is committed to doing all it can to help with advice and guidance in enabling clergy and authorised ministry to minister safely. You should take all possible steps to ensure the personal safety of yourselves and your families in relation to your house, church office and vestries.

4.1.2 In the event of any incident involving verbal abuse, threats or actual violence to you or a member of your household, you should contact the police and Rural Dean or Archdeacon immediately; they will provide immediate practical and pastoral assistance.

4.1.3 Basic precautions include:

- Ensuring that porches and entrances are well-lit, using spy-holes
- Not inviting unknown visitors beyond the office or study in a house
- Not leaving unknown visitors unattended in an office or house
- Not seeing children or a vulnerable adult alone
- Ensuring that other people know when you are seeing people in the house, or seeing people at an external venue, and that someone has a contact number for emergencies or an address

4.1.4 You can find other useful information via the following links:

[Working alone in a church](#) - A guide from Ecclesiastical Insurance

[Personal Safety Plan](#) - a guide from Ecclesiastical Insurance

[The Suzy Lamplugh Trust](#) - the UK's pioneering personal safety charity and leading stalking authority.

### 4.2 HEALTH AND SAFETY

#### Introduction

4.2.1 Clergy have health and safety responsibilities, to themselves and their families, and within their churches and church buildings, and parochial responsibilities.

4.2.2 Much helpful information, advice and guidance can be found through [this link](#) to Ecclesiastical Insurance. This includes template policies and risk assessments.

4.2.3 Working from home can bring its own health and safety hazards and you should be mindful of good practice tips regarding electricity, water, gas, computers, cabling and so on. The Diocese has a policy on holding events in your home and this is available from Church House. Again, much information and good advice can be found on the Health and Safety Executive's website. This is especially helpful if parishes are employing other people such as

administrators as there will be health and safety liability for these employees. These can be found on the [Health and Safety Executive website](#).

#### 4.3 SAFEGUARDING

- 4.3.1 Truro Diocese, in line with all dioceses, national legislation, best practice and clear Church Commissioner guidance, has very strict rules and guidelines for matters relating to child protection and the protection of vulnerable adults. All diocesan requirements, guidelines and policies for parishes can be found on the diocesan website [here](#)
- 4.3.2 Every PCC must maintain current policies, recruit through National Church Safer Recruitment guidance and pay due regard to national policies and codes of conduct. See [here](#) for more details.
- 4.3.3 All clergy, readers and those with authorised ministries must attend mandatory training and this will be monitored and recorded through the safeguarding team.
- 4.3.4 There are a variety of template resources for parishes through the [diocesan website](#) and links to local authorities, statutory bodies etc.

## 5 FAMILY POLICIES

### 5.1 INTRODUCTION

5.1.1 The Diocese places great value on family life and the vocation of parenthood is to be celebrated. We have policies and practices in place to ensure that you are able to support, and spend time with, those you care for, about and live with. General advice and information for clergy is available on the Church of England website [here](#) and there is specific guidance for clergy about to become clergy [here](#), but our specific policies are below.

5.1.2 Although clergy are not employees any legislative changes to the rights of employees in respect of maternity, paternity, parental and adoption leave will automatically apply to clergy.

### 5.2 MATERNITY LEAVE AND PAY

#### Introduction

5.2.1 This policy includes both information and some practical guidance and a checklist to help work through the various things to think about as the pregnancy continues. It reflects, and takes into account, the Church of England guidance to dioceses on maternity policy [here](#).

5.2.2 You are encouraged to inform your appropriate senior member of clergy and the Archdeacon as soon as possible, and no later than 15 weeks before the expected week of childbirth (EWC), so that:

- you can receive information/advice regarding your entitlement to maternity leave and pay;
- there is time for any necessary payroll action to be taken;
- a risk assessment can be undertaken;
- you can discuss options and arrangements for cover; and
- have any other discussion that might be helpful or other advice given.

5.2.3 Confidentiality will be maintained at all times.

#### Ante-natal care

5.2.4 Clergy have the right to paid time-off for ante-natal care regardless of the length of service or the number of hours that they work.

#### Maternity leave entitlements

5.2.5 All office holding clergy (whether stipendiary or self-supporting), including those in training curacies, are entitled to 52 weeks of statutory maternity leave from the day they join the diocese. It is made up of two parts:

Ordinary Maternity Leave (OML) - 39 weeks

Additional and unpaid Maternity leave (AML) - 13 weeks

- 5.2.6 The clergy member must send her Archdeacon and HR her MATB1 form as soon as possible. This is forwarded to the national clergy pay team for stipend payment purposes. They should provide:
- Their full name and place of work;
  - The expected date of childbirth; and
  - The date they are intending to commence maternity leave.
- 5.2.7 Individuals have the right to change the date they wish to commence their maternity leave and much will be down to local arrangements and the individuals own wishes - however, they should give a reasonable period of notice.
- 5.2.8 Clergy who live in accommodation provided by the Diocese are entitled to stay in it throughout their maternity leave.

### **Maternity Pay**

- 5.2.9 In the Diocese of Truro, there is no qualifying period for maternity pay and clergy will receive Enhanced maternity pay at their full stipend rate for the 39-week OML period regardless of when they started with us. For those clergy that qualify, this will include an element of [Statutory Maternity Pay](#) (SMP), which the Church Commissioners can claim back from the government. Whether you qualify or not however for SMP, this does not affect your monthly maternity pay from the Diocese.
- 5.2.10 Maternity pay is subject to income tax and NI in the same way as normal earnings.
- 5.2.11 The Clergy Pension Scheme ensures that individuals' contributions are paid automatically as usual during maternity leave, regardless of whether this is paid or unpaid. Voluntary contributions may be decreased or increased if wanted.
- 5.2.12 Maternity leave/pay can start on any day of the week but not before the beginning of the 11<sup>th</sup> week before the expected week of childbirth. However, if a woman gives birth before the start of their maternity leave, then their maternity leave/pay will start the day after the birth.
- 5.2.13 A woman may not work for two weeks immediately after the birth of a baby by law.

### **Pregnancy related-illness before maternity leave commences**

- 5.2.14 If a woman is absent from work due to a pregnancy related illness, at the beginning of the 4<sup>th</sup> week before the expected week of childbirth, this absence will trigger the start of her maternity leave. In this case, her

maternity leave will commence on the day after the first day of absence after the beginning of the 4<sup>th</sup> week before the expected week of childbirth.

- 5.2.15 Individuals should let their Archdeacon know if their baby arrives before they start maternity leave. This is so adjustments to the date for their return from maternity leave can be discussed.

#### **Working during maternity leave (Keeping in Touch days)**

- 5.2.16 As office holders, and not employees, clergy are not eligible for [“KIT” \(Keeping in Touch\) days](#) as defined by current employment legislation, and can stay in touch or do some work, attend courses, etc. without losing any entitlement to maternity pay.
- 5.2.17 However, the principle behind the legislation is useful, and undertaking some work can benefit both individual clergy and their parishes. Clergy may find it helpful to agree, with their Archdeacon and Churchwardens (or other individuals) a plan to keep in touch with the diocese and the parish. This should be reviewed regularly as the leave progresses.
- 5.2.18 It is however important that clear boundaries are agreed, communicated and adhered to, e.g. in relation to parishioners, PCCs, clergy colleagues, etc. The KIT legislation allows for up to 10 days of work whilst on leave before SMP is affected; clergy and PCCs and clergy are encouraged to set this as an appropriate boundary to prevent overwork.
- 5.2.19 If they agree to work whilst on unpaid maternity (or other) leave then they should arrange to have an additional day’s leave (similar to time off in lieu) following their return to work.
- 5.2.20 The appropriate Archdeacon or HR can be consulted if there are any problems. However, parishes and colleagues should be aware there is no obligation for the individual to attend their normal role/work during this time nor is there the obligation for parishes or the Diocesan clergy leaders to expect, or offer, such opportunities.

#### **Maternity leave and annual leave**

- 5.2.21 The period of absence on maternity leave will be counted as “service” for the purposes of annual leave. Individuals are advised to take their annual leave in the current year before the commencement of their maternity leave but where this is not possible or practical, for example where the baby arrives early, then this leave can be taken after the maternity leave period.
- 5.2.22 When an individual returns to work they may take the remainder of their annual leave entitlement once they have returned to work. Often women decide to take it immediately after the end of their maternity leave. If it is not possible to do take all leave in the year it was accrued, it may be carried over to the following year.

- 5.2.23** If an individual is unsure whether they will be returning to work, they are advised to take only a leave amount based on her anticipated service in the current leave year. If an individual returns to work they will be entitled to any outstanding leave entitlement due to her.

### Health & Safety

- 5.2.24** A pregnant individual is given specific health and safety protection under the European Union “Pregnant Workers Directive” and the Management of Health & Safety at Work Regulations 1999 and the Working Time Regulations 1998. Whilst clergy are not employees, these do provide some sound advice and good practice, and the diocese recommends that individuals are mindful of these and take responsibility for familiarising themselves with their content, see [here](#) for more information.
- 5.2.25** The individual and their Archdeacon (or Rural Dean/Training Incumbent) should together complete a risk assessment as soon as possible, and review this on a regular basis. Diocese HR can provide a template for this if needed. Any area of work or work practice, which might adversely affect the individual’s, or baby’s, health and safety or pose a risk should be raised. These can then be talked through, and any adjustments or action recorded and taken as required.

### Maternity checklist

- 5.2.26** It can be a tricky balance maintaining proper time out on maternity leave, having an ear for what is going on in the parish/benefice, being seen out and about, and managing the expectations of parishioners, callers and others.
- 5.2.27** The following questions are prompts to help you think through boundaries, and plan for, what may arise and can be talked through with the Archdeacon and an incumbent/DDO or Rural Dean as appropriate.

|          | Checklist   | What’s next? | Done? |
|----------|---|--------------|-------|
| <b>1</b> | Establish with those close to you what you feel the boundaries need to be in your particular situation.   |              |       |
| <b>2</b> | Meet with the appropriate people to discuss preferences and how they might be accommodated.   |              |       |
| <b>3</b> | Might you want to worship in the Church and remain open to hearing what is going on?<br><br>Might you want time away for a period, and only be informed of particular things e.g. a significant |              |       |

|    | Checklist   | What's next? | Done? |
|----|---|--------------|-------|
|    | <p>death in the parish or other important concern?</p> <p>Might you want a key link person/people to keep you in touch rather than lots of well-meaning people? How can you manage this?</p>  |              |       |
| 4  | <p>Meet with your PCC to express your preferences in this regard and how they may be accommodated. Whatever you agree, confirm agreements in writing so there is an ongoing reference point throughout your absence.</p>                          |              |       |
| 5  | <p>Practical arrangements - check and put on an "out of office" message on emails and your voicemail in order to manage enquiries effectively. If you have a personal email address, who needs to have it (e.g. Diocesan HR, clergy payroll)?</p> |              |       |
| 6  | <p>Are there any key social events or activities you want to be involved with while on leave?</p>   |              |       |
| 7  | <p>What cover arrangements are needed and are there gaps that others e.g. the Rural Dean may be able to help with?</p>  |              |       |
| 8  | <p>Will there be a temporary cover person? Are you happy to have catch up meetings or be available for any ad hoc advice needed? Or do they know who else to contact, etc.</p>  |              |       |
| 9  | <p>How will people knocking on the vicarage door, be dealt with or redirected? It might be helpful to have a small A5 leaflet that can be handed to any callers setting out what to do for contact re. baptism, weddings, and other issues.</p>   |              |       |
| 10 | <p>Have you, or the person responsible, updated any website information or</p>  |              |       |

|  | Checklist  | What's next? | Done? |
|--|--|--------------|-------|
|  | social media so it's clear about arrangements when you are on leave? |              |       |

### Returning to work after maternity leave

- 5.2.28** Under current regulations, the Archdeacon will assume that the maternity leave will end at the dates which had been agreed with the individual.
- 5.2.29** If an individual wishes to return to work before their official return date, then they should discuss this with their Archdeacon so that arrangements can be made and any advice or other support can be given.
- 5.2.30** Where an individual wishes to return to work but on a different basis this should be discussed with the Archdeacon prior to any local or PCC conversations taking place.
- 5.2.31** Where it has been agreed that an individual may return to work on a different basis, i.e. part-time, the details and implications should be thoroughly explored and agreed with the Archdeacon. (See also Right to request time off work or adjustments to the duties of the office to care for a dependent within this section).
- 5.2.32** When it has been agreed that an individual can take parental leave immediately following the expiry of maternity leave, local arrangements must be discussed with the Archdeacon. (See Parental Leave policy within this section).
- 5.2.33** An individual has the right to return to the clergy role in which she was prior to the maternity leave period. In the most exceptional of circumstances where this is not practical or advisable, the Archdeacon will discuss any available options or alternatives.
- 5.2.34** Where an individual is in a training role e.g. a curacy, or other fixed term role (Qualified Common Tenure), appropriate extensions to the training or other arrangements will be agreed by the Diocesan Director of Ordinands in discussion with the individual, the IME Phase II tutor, Head of Ministry and Archdeacon.
- 5.2.35** If an individual decides not to return to work after the maternity leave period, they must inform their appropriate Archdeacon giving their decision to resign from their post and a mutually agreed notice period.

### Maternity leave cover in a parish setting and responsibilities

- 5.2.36** Under the Ecclesiastical Terms of Service Measure Office; Regulation 29 affords the appointment of fixed term roles in a few very specific settings. Cover for maternity leave is one such provision. Such fixed term arrangements are made only with the express direction of the Diocesan

Bishop and will be clearly set out within a Statement of Particulars which will be shared with the office holder for reassurance and clarity. The end date of any fixed term arrangement can be changed should the office holder return to work earlier than initially discussed.

- 5.2.37 All office holders on maternity leave remain in office while they are on leave - which means they retain the rights and responsibilities that go with the office, for example the right to remain in any accommodation provided for the better performance of their duties and the obligation to ensure that the duties of the office are carried out on their behalf.
- 5.2.38 For clarity, unlike an employee, an office holder does not have the right to be found an equivalent post when he or she returns from maternity and adoption leave. However, she or he has deemed not to have left her office whilst on maternity/adoption leave and therefore returns to work in the existing post as of right unless she or he resigns or is removed from it for under CDM or redundancy.

### 5.3 ADOPTION LEAVE AND PAY

#### Introduction

- 5.3.1 As with pregnancy, clergy should inform their appropriate senior member of clergy and the Archdeacon that they will be adopting, or going through the adoption process, as soon as possible in order to receive advice, support and information/regarding their entitlement to adoption leave and pay. However, it is recognised that some clergy may not wish to let people know about their plans until things are clearer. Although joyful, this can be a very anxious and stressful time and will do all we can in terms of practical and pastoral support.

#### Time off for introductions

- 5.3.2 Clergy have the right to paid time-off for specific introduction or other meetings with appropriate social workers/children. Clergy who are adopting should let their Rural Dean and Archdeacon know when they are planning to take this time off and provide evidence if asked.

#### Adoption Leave Entitlements

- 5.3.3 Leave arrangements can begin once a member of clergy can demonstrate that they have been matched with a child through an authorised adoption agency and are the main carer for the child (see the current laws [here](#))
- 5.3.4 Once you have your Matching Certificate (or equivalent) from the adoption agency you should discuss this with the Archdeacon and send the certificate to HR with a note of the date when you plan to start your adoption leave who will send this on to the Church of England clergy payroll office. They need the certificate ideally at least 28 days before the start of your leave to set up a claim for Statutory Adoption Pay. We appreciate there is

sometimes very little time between the date you are matched and the date a child is placed with you, so please send as soon as reasonably possible.

### **Adoption Pay**

**5.3.5** In the Diocese of Truro, there is no qualifying period for adoption pay and clergy will receive enhanced adoption pay at their full stipend rate for the 39-week OAL period regardless of when they started with us. For those clergy that qualify, this will include an element of [Statutory Adoption Pay](#) (SAP). Whether you qualify or not however for SAP, this does not affect your monthly adoption pay from the Diocese.

**5.3.6** Adoption pay is subject to income tax and NI in the same way as normal earnings.

**5.3.7** The Clergy Pension Scheme ensures that individuals' contributions are paid automatically as usual during adoption leave, regardless of whether this is paid or unpaid. Voluntary contributions may be decreased or increased if wanted.

### **Working During Adoption Leave (Keeping in Touch days)**

**5.3.8** The same principles of KIT days apply for adoption leave as for maternity leave and pay above.

### **Adoption Leave and Annual leave**

**5.3.9** The period of absence on adoption leave will be counted as "service", similar to maternity leave, and the same rules apply (see above).

### **Disrupted adoption**

**5.3.10** If your adoption leave has started but you are then notified that either the placement will not take place, or if the child is returned to the adoption agency after placement or if, tragically, the child dies after placement, your entitlement to adoption leave and if applicable, adoption pay, will continue for a further 8 weeks from the end of the week in which the disruption occurred, unless your leave and/or pay would have ended earlier in any event.

## **5.4 PATERNITY LEAVE AND PAY**

### **Introduction**

**5.4.1** You are entitled to time off when you will be the father or mother of a baby that a woman giving birth to, of a child being adopted, or a baby being born through surrogacy arrangements, providing you will have responsibility for the child's upbringing. You should inform your Archdeacon, Rural Dean (and Training Incumbent if appropriate) and HR as

soon as possible so that initial thoughts regarding potential paternity leave can be discussed, and clergy payroll notified.

### **Qualifying criteria**

- 5.4.2 We do not require any period of service in order to qualify for paternity leave or pay.

### **Paternity leave and pay**

- 5.4.3 You may take four weeks' paid leave, taken either as a block or as separate weeks. A week is a calendar week, so if you work 2 days a week and take these two days off, that counts as a week. Discussions should take place locally regarding cover etc.
- 5.4.4 The appropriate Rural Dean, Training Incumbent and/or Archdeacon, and HR should be notified of an intention to take paternity leave in writing, detailing the expected week of delivery, the length of leave the leave to be taken and the start date. This date can always be negotiated depending on the individual circumstances.
- 5.4.5 We offer stipendiary clergy paternity enhanced leave on full stipend, but can claim back [Statutory Paternity Pay](#) from the government. In order for clergy payroll to successfully do this, we must be notified at least 28 days before the start of the paternity leave using the HMRC form [SC3](#) (or SC4 if you are an adoptive parent).

### **Antenatal appointments**

- 5.4.6 You can take paid leave to accompany a pregnant woman to antenatal appointments up to the equivalent of 21 hours total if you're:
- the baby's father
  - the expectant mother's spouse or civil partner
  - in a long-term relationship with the expectant mother
  - the intended parent (if you're having a baby through a surrogacy arrangement)

### **Adoption appointments**

- 5.4.7 You can take paid leave to attend adoption appointments after you've been matched with a child up to a maximum of 21 hours.

## **5.5 SHARED PARENTAL LEAVE**

### **Introduction**

- 5.5.1 Mothers and adopting parents who meet the conditions for entitlement to Shared Parental Leave remain entitled up to 52 weeks of maternity leave within the scope of this policy.

- 5.5.2 Mothers and adopting parents who meet the conditions for entitlement to Shared Parental Pay (statutory) are entitled to up to 39 weeks of pay.
- 5.5.3 In the diocese this means that for clergy mothers, clergy fathers and clergy partners you are entitled to your full stipend for the period of shared parental paid leave you take on within the scope of this policy.

#### **Process for reducing maternity or adoption leave to return to work**

- 5.5.4 After taking two weeks' compulsory leave (see below) there is an entitlement to reduce maternity or adoption leave either by returning to work before the full entitlement of Statutory Maternity/Adoption Leave has been taken, or by giving notice to curtail their leave at a specified future date and to share the balance of any remaining leave, and pay, with the other parent.
- 5.5.5 The eligibility and notification requirements for Shared Parental Leave are quite complex. If this is an issue that is of interest, please get in touch with HR at Church House who will be able to share details of how this can work in practice, or discuss this with your Archdeacon.
- 5.5.6 Clergy who exercise an entitlement to Shared Parental Leave and who meet the eligibility requirements of the Statutory Shared Parental Pay (General) Regulations 2014 are entitled to Statutory Shared Parental Pay. See [here](#) for further information.

#### **Shared parental leave and pay**

- 5.5.7 Shared Parental Leave must be taken between the baby's birth and first birthday (or within one year of adoption).
- 5.5.8 To qualify you must share responsibility for the child with one of the following:
- Husband, wife, civil partner or joint adopter
  - The child's other parent
  - Your partner (if they live with you and the child)
- 5.5.9 You must also:
- Have been in your role continuously for at least 26 weeks by the end of the 15th week before the due date (or by the date you're matched with your adopted child)
  - Remain in the same role while you take shared parental leave
- 5.5.10 Your partner must:

During the 66 weeks before the week the baby's due (or the week you're matched with your adopted child):

- Have been working\* for at least 26 weeks (they don't need to be in a row);
- Have earned at least £390 in total in 13 of the 66 weeks (add up the highest paying weeks, they don't need to be in a row)

\* This can be as an employee, worker or self-employed person. Your partner doesn't have to be working at the date of birth or when you begin your leave and pay period.

### **For Shared Parental Leave to start**

**5.5.11** The mother (or the person getting adoption leave) must either:

- Return to work, which ends any maternity or adoption leave
- Give the diocese what is known as binding notice' of the date when they plan to end their leave (you can't normally change the date you give in binding notice)

**5.5.12** You can start SPL while your partner is still on maternity or adoption leave as long as they've given binding notice to end it.

### **When can't shared parental leave happen?**

**5.5.13** A mother can't return to work before the end of the compulsory 2 weeks of maternity leave following the birth (4 weeks if she works in a factory). If you're adopting, the person claiming adoption pay must take at least 2 weeks of adoption leave.

### **Changing your mind**

**5.5.14** It is possible to change arrangements, but it is strongly advised you talk to the Archdeacon to explore options before any requests for changes are made so that discussions can be supported and appropriate advice shared.

## **5.6 PARENTAL LEAVE**

### **Introduction**

**5.6.1** All parents are legally entitled in law to a period(s) of time to assist in the arrangements for their child(ren)'s welfare, known as parental leave. All parental leave is unpaid (whether for father/mother/other carer). For more details see the current legislation [here](#). These rules apply to clergy, other than the requirement for a qualifying period of employment (i.e. service) with us to be eligible.

### **Qualifying criteria**

**5.6.2** We do not operate a qualifying period for unpaid leave. You are entitled to this from the day you join us.

## **Making leave arrangements**

- 5.6.3 As parental leave falls outside the normal leave arrangements, the local senior colleague or Archdeacon, and HR, should be advised of parental leave to be taken to be assured of cover arrangements, and so that clergy payroll can be notified.

## **5.7 DEPENDANTS' LEAVE**

### **Introduction**

- 5.7.1 A dependant is defined in law as a person whose support and maintenance is contingent upon the aid of, or being sustained by, another person. This may be a:

- Child
- Spouse
- Parent
- Grandparent
- In secular arrangements - a co-habitee or civil partner
- Anyone who reasonably relies on the individual for assistance in cases of illness and/or injury

- 5.7.2 All clergy have much flexibility built in to the way they are able to carry out their duties. You are entitled to short period(s) of paid leave (usually no more than a few days) to assist in dealing with emergency situations or to make alternative arrangements in instances such as:

- Providing assistance when a dependent is injured, falls ill or gives birth
- To make care arrangements for a dependent who is ill or falls ill;;
- As a the consequence of the death of a dependent due to the unexpected disruption or termination of current care arrangements

- 5.7.3 Longer term flexible working, as it is understood in a normal legal employment context, does not apply to clergy office holders, who have more autonomy than employees in determining their working patterns. The Ecclesiastical Offices (Terms of Service) Directions 2010 does currently confer a legal entitlement on clergy to make requests to take time off or make adjustments to the duties of the office to care for a dependant, but not for other reasons. The procedures for doing this are below.

### **Dependants' leave arrangements**

- 5.7.4 We are committed to providing as much appropriate and reasonable pastoral and/or practical support that can be offered and/or arranged. Individuals should let their senior colleague/Archdeacon know as soon as possible of their need for some time to make arrangements to care for dependants

- 5.7.5 The amount of time off will depend on each set of circumstances.

- 5.7.6 Where prolonged absence is required individuals should talk to their local senior colleague, and/or Archdeacon, as it may be appropriate for an agreed period of special leave, compassionate leave, unpaid leave, or temporary change in working days/arrangements.
- 5.7.7 Where an individual wishes to request time off work or adjustments to care for a dependent on a more permanent basis because of changing responsibilities they should seek immediate advice from the Archdeacon.
- 5.7.8 The process for requests and more guidance is set out in the Church of England policy [here](#).

## 5.8 CHILD PLACEMENT AND FOSTERING

### Introduction

- 5.8.1. We recognise and value the contribution that foster carers make to society, and especially to the lives of children in care. We understand that foster carers who undertake work in addition to fostering often need some flexibility in their working arrangements to meet the needs of their fostered child (or children). We are therefore committed to support any member of licensed clergy who is a foster carer or an approved kinship carer (i.e. relative or friend raising children who cannot live with their parents).
- 5.8.2. We do this by, wherever practical, having working practices and an organisation culture that creates a fostering friendly organisation. This includes offering, or agreeing to, flexible working arrangements that respond to the needs of foster carers or approved kinship carers.
- 5.8.3. The process of seeking approval to become foster carers is a lengthy one and places a number of reasonable but demanding expectations upon prospective carers, particularly in relation to the training, assessment and approval process. Therefore, this policy extends to prospective foster or kinship carers who have begun the formal process of seeking approval and registration as carers, not just those who have been approved.
- 5.8.4. We will offer clergy the opportunity to apply to work flexibly where this is compatible with the demands of their ministry and role. Our flexible working, emergency time off for dependents, and parental leave policies all apply to foster carers and approved kinship carers, but this policy sets out the additional time off that we will offer.

### Scope and eligibility

- 5.8.5. This policy covers licensed clergy who are, or who are applying to be, foster carers, or who, as a member of the child's family or a friend, are taking on the long term care of a child under a special guardianship, residence, child arrangement order, or other court order. For cases

relating to adoption, or permanent fostering placements (i.e. “fostering to adopt”), please see the adoption policy in the Clergy Handbook.

5.8.6. It applies to all licensed clergy, regardless of length of service.

5.8.7. To be eligible for the benefits outlined below you must either be:

- applying to become a foster carer; or
- an approved foster carer and have a child in placement (or have had a child in placement for 75% of the previous 12 months) or are an approved kinship carer; or
- an approved respite foster carer (who provides temporary care for foster children when their foster parents need some time to themselves).

5.8.8. In exceptional circumstances, when the needs of the child requires both carer’s full time involvement, leave may be granted when the clergy member is not the primary carer.

5.8.9. If more than one carer is licensed in the Diocese of Truro, then only one shall be entitled to receive this leave.

#### Time off

5.8.10. We will give paid time off in any 12-month period as follows:

- assessment and training prior to approval as a foster carer - 21 hours (pro-rata for part-time clergy based on a 40 hour week);
- attendance at a panel for approval - one day;
- attendance at panel for final sign-off (normally after one year) - one day
- child review meetings, annual foster carer review meeting, and ongoing training - up to six days or 40 hours (pro-rata for part time clergy)
- To end or begin a placement (meetings, handovers, or farewell activities) - two days

5.8.11. Requests for leave should be made to, and discussed with, the Rural or Area Dean, or the Archdeacon if there is no Rural or Area Dean, for authorisation by them. You should outline the reason for, and amount of, leave required, and include supporting and relevant documentation.

5.8.12. If you need to take more leave than the maximum entitlement of paid leave above, you should discuss with your Rural or Area Dean what other options might be available e.g. annual leave, time off in lieu, temporary change in working hours or pattern, or unpaid leave. You are also encouraged to discuss your plans with your PCC(s) but understand you may feel that this is not appropriate given the confidential and sensitive nature of fostering.

5.8.13. Agreement to leave should be made in writing and copied to HR, who can provide support and advice to clergy.

## Support and more information

- [Fostering Network](#) - The Diocese of Truro is proud to be a member of the Fostering Network, the UK's leading fostering charity, see [here](#) for more details. As a member we commit to promoting and supporting their annual [Foster Care Fortnight](#)
- [Fosterline](#) - support and advice on fostering
- [Family Rights Group](#) - information on kinship caring
- [Cornwall Council Fostering](#) advice and information
- [Home for Good](#) (merged with [Safe Families](#)) - work to mobilise the Church in the UK to respond to the needs of vulnerable children through families stepping forward to foster, adopt or provide supported lodgings for teenagers, and advocacy and engagement to create systemic change.

## 6 WELFARE AND WELLBEING

### 6.1 WELLBEING PRINCIPLES

- 6.1.1 The Diocese places the wellbeing of its clergy and staff as its highest priority. Many of the policies and practices in this handbook are designed with this in mind, e.g. annual leave, reflective practice groups, maternity and paternity leave, ministerial development, etc. However, we know that the demands placed upon you are many and demanding, and can leave clergy feeling isolated. The current available support sources, including our employee assistance programme provided by the occupational health service, and the Diocesan counselling service are on our website here. You, and your family, are encouraged to use these whenever you think there may be a need to do so.

### 6.2 SICKNESS ABSENCE

#### Principles

- 6.2.1 This policy is based on the following principles:
- 6.2.2 Support - All clergy will be supported through sickness, ill health and in critical illness.
- 6.2.3 Respect for individual dignity and privacy - in accordance with medical guidelines, medical information will only be shared with the individuals' express informed consent.
- 6.2.4 Quality pastoral and practical care - we will stay in touch throughout the stages of illness and/or longer-term treatment and that we can offer and/or link with local networks of colleagues, for the best professional, pastoral, and practical care.
- 6.2.5 Seeking medical reports and professional advice - to ensure that any medical reports are obtained when needed, will offer practical advice, suggestions and recommendations phrased both in terms of fitness for duty, and short, medium and longer term adjustments which will enable the individual to return to full capacity at work as safely as possible.
- 6.2.6 Ensuring appropriate financial support - to ensure that stipends are maintained within the appropriate diocesan and Church Commissioner policies, and that in cases of hardship we will work to try and secure grants and other benefits from appropriate bodies on an individual's behalf.
- 6.2.7 Being flexible and focusing on the individual - to work with an individual to help them structure their working schedule and workload in such a way

that will give them the maximum flexibility to balance managing their medical treatment with maintaining effectiveness and efficiency at work.

- 6.2.8 Providing information and support - to work with individuals to seek out information that may help with their circumstances, and where appropriate and wanted, put people in touch with others known to us who may have knowledge of/been through similar circumstances and can offer support.
- 6.2.9 Providing assistance with cover arrangements - often an individual is left to make their own arrangements with Churchwardens and/or their Rural Dean at a time when they are feeling most vulnerable/ill. We will work with individuals to lighten this load and to help make cover arrangements for them where this is helpful.

### **Reporting Sick Absence**

- 6.2.10 It is especially important for your own wellbeing that you take appropriate time off if you are ill. It is equally important that you report any illness or health problems if this means you are unable to perform the duties of your office, even if it is only for a day, as required under [the Ecclesiastical Offices Measure section 27](#). If you do not do this you may not only put your own health at risk, but also the wellbeing and care of your family, parishioners and colleagues.
- 6.2.11 When you know are going to be absent in advance, you will be able to plan appropriately (e.g. if you are having an arranged operation or treatment). Where this is not the case and you feel unable to work, you should report your absence by phoning the Archdeacon's office or your manager, if you have one, ideally by 10am on the morning of the first day of illness. In some instances, the Rural Dean or Training Incumbent may be your first point of contact.
- 6.2.12 If you feel able to have a conversation, you should discuss with the person(s) you contact:
- the nature of your illness or health problem (if you feel able to discuss this);
  - anything (other than that agreed or will discuss with your Churchwardens/colleagues/Rural Dean) that the Archdeacon may need to do or be aware of due to your absence;
  - what action you or others will take, or have taken, to ensure you are not contacted whilst you are unwell (e.g. putting a message on your phone, setting an out of office reply on your email account); and
  - when you will make contact again.
- 6.2.13 If you are too ill to have a conversation, and do not have anyone who can do so on your behalf, then a text or email is perfectly appropriate. In such

a situation, you must not worry about your ministry. People will cope in your absence!

- 6.2.14 If your absence is 7 days or less, when you return to work you should complete a self-certificated sick certificate form (see [Annex 6a](#)) and send it to the Archdeacon's office (or other senior clergy as agreed otherwise) and HR. There is no need to complete a certificate for any half days you are unable to work.
- 6.2.15 If your absence lasts more than seven days then you must then obtain a "Fit Note" from your GP or hospital to cover your absence from the 8th day. You should post or email a copy of this to the Archdeacon's office (or other senior clergy as agreed otherwise) and HR as soon as possible, and retain the original note.
- 6.2.16 If your absence continues, or is likely to continue, beyond the first GP/hospital dates on the Fit Note, you should send consecutive notes at regular intervals according to the dates given on each note. On your return to work, if not before, you will need to complete a self-certificated absence form for the first 7 days, as all days of absence should be covered.
- 6.2.17 The Diocese is required to send sick certificates to the national clergy payroll team.

#### **Sick pay**

- 6.2.18 The Diocese has an occupational sick pay scheme during periods of certificated absence that supplements statutory sick pay (SSP).
- 6.2.19 You will receive full stipendiary pay during sickness absence for up to 28 calendar weeks within a rolling 12-month period, followed by up to a further 24 weeks at half pay.
- 6.2.20 Should you agree a phased return to work from sick leave, days or hours not worked will still count as sick leave and you will be paid these at the sick pay rate applicable as above. Hours or days worked will be paid at your normal stipendiary rate.
- 6.2.21 Any clergy who do not qualify for SSP under government regulations or who have exhausted their period of sick pay entitlement as above can claim sickness benefit direct from the appropriate government department.

#### **Occupational Health**

- 6.2.22 We have a professional consultancy arrangement with an independent occupational health provider.
- 6.2.23 Occupational health advice focuses on how a medical condition, illness or absence impacts on your ability to fulfill your role, and what reasonable adjustments might be made to facilitate a return to work if you are absent. Advice may include a framework and guidelines for managing a gradual

return process, and may include, where appropriate, advice for family, colleagues, senior clergy or managers.

- 6.2.24 Occupational health referrals are made by HR following a discussion with the Archdeacon or line manager (or Bishop, as appropriate), and the individual concerned.
- 6.2.25 We will usually seek advice if you are absent for a continuous period of 3 weeks or more, have had five or more absences in a 12 month period, or have a condition or illness that is affecting your performance and ability to undertake your role effectively. All of this is quite normal and the aim is to support clergy in their ministry. All referrals are made with your consent, shared and discussed with you, and draft reports from the OH advisor are shared with the individual before seen by HR and the Archdeacon (and Bishop if appropriate).
- 6.2.26 The Occupational Health professional will look at nature of work, workload, current pressures, and priorities, and give their advice on what is realistic and what is not advisable. Sometimes more than one OH appointment will be made so that the OH physician can help you individual track progress and increase workload gradually and so return to your full duties.

### **Supporting critical and serious illness**

- 6.2.27 There are four key stages to critical or serious illness

- diagnosis
- treatment
- recovery
- returning (not returning) to work

#### Diagnosis stage

- 6.2.28 It is important that as soon as possible after diagnosis the individual contact their appropriate senior local colleague (e.g. Rural Dean and/or their Archdeacon) so that both practical and pastoral support can be put in place.
- 6.2.29 The Archdeacon will arrange to meet the individual as soon as possible and will be in touch with their senior colleague or Rural Dean. The primary purpose of this meeting (which may be with the individual on their own or with a spouse or other family member or colleague - whichever they prefer) is to be as supportive as possible. They will ensure the individual has access to this policy and will talk through immediate plans for treatment and other hospital visits etc., the likely impact of treatment, whether or not it would be appropriate for the individual to continue to work and how this should be reviewed. They will also review local cover arrangements with the appropriate people. Most importantly they will focus on the likely impact of the diagnosis and ongoing medical treatment on the individual

themselves, their family members; on their team/local senior colleagues; and on their local church communities.

### Treatment

- 6.2.30 The nature of treatment for critical illnesses will vary from person to person and will determine how much/what work an individual is able to maintain.
- 6.2.31 During treatment (or with long term sickness for other reasons) an Archdeacon or any other nominated contact person should arrange to be in contact at regular intervals - purely for the purposes of keeping in touch.
- 6.2.32 At any stage of an individual working through treatment they feel they are unable to work, or are advised not to for a period, they should let their Archdeacon know and send in doctor's certificates at the appropriate times.

### Recovery and returning to work

- 6.2.33 During a period of recovery and the road to returning to full capacity/duties the Diocese may take professional medical advice on what is most appropriate for an individual.
- 6.2.34 Through the Archdeacon, a referral may be made by the Diocese HR for the individual to be assessed by the Occupational Health (OH) service, who will give both the individual and the Diocese professional advice.
- 6.2.35 OH will look at nature of work, workload, current family and other pressures, and priorities, and give their advice on what is realistic and what is not advisable. It is usual that more than one OH appointment will be made over the course of the absence so that the OH professional can advise and help the individual, their senior colleagues, senior staff, to make adjustments, track progress and increase workload gradually and so return to their full duties safely.
- 6.2.36 OH will advise throughout the period of recovery, and the phased return to work, appropriate adjustments. These may include a range of temporary changes which may include, e.g.
  - reduced working hours
  - reduced days
  - only working one or two 'sessions' a day/week etc
  - change in role
  - reduced responsibilities
  - recommendations to assist plans for transport to and from work engagements
  - onward referral for other professional specialist advice and guidance (where appropriate these costs will be met by the Diocese), and

- any other reasonable adjustments that would be helpful.

**6.2.37** Where appropriate the Archdeacon, or a local senior colleague, may arrange a 'round-table' discussion to ensure that the professional advice and guidance, and diocesan and local pastoral and practical support which are in place for the individual and their family, are well planned and coordinated.

#### Where an individual is unable to return to work

**6.2.38** In the most serious of cases, it may be that an individual will not be able to return to, or maintain their duties.

**6.2.39** Where their own doctor/specialist supports the application, an individual may apply for [ill health retirement](#) via the Pension scheme.

**6.2.40** Where the individual is not able to move from the diocesan property into their own accommodation the Diocese will do all it can to provide assistance and/or advice.

**6.2.41** Initially a period of 3 months will be given to remain in the current property during which time the Diocese will work with the individual and their family to help them find appropriate alternative accommodation.

**6.2.42** Pastoral support to both family members and the individual will be paramount at this time.

#### **Professional counselling support for clergy and their families**

**6.2.43** You and members of your families are able to access independently either the Diocesan Professional Counseling Service, the OH employee assistance programme or other support services. Information can be found at [Annex 6b](#).

**6.2.44** You may also be recommended, and referred, to have professional counselling. This may be to an external therapist or to the Diocesan Service as most appropriate. Other referrals may be for other short-term medical interventions/support such as physiotherapy. All referrals are in confidence.

#### **Disability**

**6.2.45** The Diocese will seek to follow the spirit of the Equality Act in support of all clergy (regardless of whether or not the individual's circumstances falls within the legal definition of a disability as set out in the Act).

**6.2.46** Where a critical illness has left an individual with a disability, or where an individual with a disability is appointed to a clergy role, the Diocese will take responsibility for working with the individual (and where appropriate

local senior colleagues) to ensure that appropriate reasonable adjustments are made that will enable the individual to work effectively.

- 6.2.47 The Archdeacon will work together with the individual and their local senior colleagues to ensure the parish(es) are aware of, and have the training required, to ensure that local reasonable adjustments are in place.
- 6.2.48 Centrally, the Archdeacon and Diocesan Secretary or HR will make the appropriate links with departments (e.g. Property, Ministry, etc.), to ensure the individual is supported, and their needs addressed appropriately; and will also ensure that there is access to appropriate professional advice and support which will ensure that the individual is able to take up/continue their role effectively.
- 6.2.49 In circumstances where specific equipment is required, e.g. specialist software, adaptations to property etc., the Archdeacon or HR will provide advice on funding and resourcing.

### 6.3 ANNUAL LEAVE AND REST DAYS

#### Introduction

- 6.3.1 It is important that you take, and record, all your annual leave time. Not doing so can contribute to over-working and burnout, does not respect your own private and family time, sets a poor example to others, and puts your, and others', health and wellbeing at risk.
- 6.3.2 The responsibility for ensuring your full leave allowance is taken lies with both you and your parish.

#### Annual leave entitlement

- 6.3.3 The annual leave year runs from 1 January to 31 December. The full-time annual leave entitlement is 6 weeks, i.e. 36 days. This is based on the expectation that clergy work a six-day week, although we do not expect that normal weekly hours exceed 40.
- 6.3.4 Annual leave is pro-rated for part time clergy. The amount of leave is calculated based usually on hours, or sometimes days, depending on what the working arrangements are. For example, for someone whose SoP states working as two days a week, annual leave will be calculated as  $36/6 \times 2 = 12$  days per year. If the hours are 24 per week, then annual leave will be calculated as  $25/40 \times 36 = 22.5$  days per year.
- 6.3.5 The days taken as annual leave may not ordinarily include more than six Sundays, and include any days taken after Christmas and Easter (unless these latter periods are taken as time off in lieu). Where Christmas Day, Easter Day or New Year's Day fall on a Sunday and you are working these days, an additional day's holiday should be taken shortly as time off in lieu.

- 6.3.6 Public Holidays do not include Christmas and Easter public holidays or where New Year's Day falls on a Sunday. As above, you clergy should take a day's leave in lieu of each if worked.

#### **Time off during the week**

- 6.3.7 When planning a working week, wherever possible you should ensure appropriate time is allocated to personal space between ministerial commitments. You are legally entitled to, and are expected to take, an uninterrupted minimum rest period of at least 24 hours in each period of seven days. However, the policy of the Diocese of Truro is that we expect our full time clergy to take an uninterrupted minimum rest period of at least 36 hours in each 7 day period.
- 6.3.8 If you work without any personal time off in a week, you should, and are entitled to, take the whole or part of a second day off during that week.
- 6.3.9 Clergy need of course to be flexible because of the nature of the role, but should you find yourself working or planning to work excessive hours, you should discuss this with your Archdeacon, and in ministerial reviews and spiritual directions, so that you can be advised and guided appropriately.
- 6.3.10 If you are required to, and are provided with, accommodation as part of your role, but also have your own property, you may stay overnight at the beginning or end of days off and, of course, as part of leave arrangements, but you should not stay more than one night away from the parsonage house during normal working weeks without prior arrangements agreed with the Archdeacon.
- 6.3.11 You are encouraged to put "out of office" automatic replies on your email and phone when on rest days and on leave.

#### **6.4 BEREAVEMENT, COMPASSIONATE AND EMERGENCY LEAVE**

- 6.4.1 We will treat all bereaved clergy compassionately and allow you reasonable paid time off to attend funerals of loved ones, deal with the administration and responsibilities associated with bereavement, and to grieve. There are no hard and fast rules about how much leave may be given - we will treat each situation individually whilst ensuring clergy are treated consistently and fairly - but it would be normal for someone to be given up to two weeks' paid leave following the death of a partner, or close family member, or maybe a close friend. This may be needed immediately following the death or later on; grief and bereavement affect everyone differently and at different times.
- 6.4.2 At present, the Church of England is not legally require to offer parental leave, as employers are. However, the Diocese of Truro has chosen to follow the statutory employee provision [here](#) and enhance it, by making it paid. This is in addition to the bereavement leave above.

- 6.4.3 If you struggle returning to work, then your Archdeacon may seek agreement from the Bishop and advice from HR for more paid leave, or agree with you some unpaid leave, reduced hours. Or you may need to take advice from your GP as to whether you are fit to work.
- 6.4.4 We offer several confidential support services that you can seek help and advice from, see the Wellbeing section.
- 6.4.5 We will also be sympathetic to any other hardship, difficulty or special circumstances that might necessitate a request for absence from work on compassionate grounds. Such circumstances might include the severe illness of a close relative or dependant. Normally such leave will be unpaid.
- 6.4.6 Requests for bereavement or compassionate leave should be made in the first instance to your Archdeacon.
- 6.4.7 If you suffer an unforeseen emergency at home that requires your immediate action and attention, and means you are unable to work for more than a day then you should apply for paid domestic distress or emergency leave after the incident. This includes flooding, gas leak, fire, emergency drain or building repairs, etc.

## 6.5 **MENOPAUSE POLICY**

### **Introduction**

- 6.5.1. The Diocese of Truro is committed to providing an inclusive and supportive working environment for everyone who works for, or ministers with, us. Menopause is a natural part of life, and should not be taboo or 'hidden'. It is not however always an easy transition, and whilst not all women will suffer with symptoms, we will support those who do, so that their experience at work and in ministry is improved.
- 6.5.2. We want our clergy office holders, especially those who have pastoral, training or management responsibilities, to understand what menopause is, and to be able to talk about it openly, without embarrassment. This applies to everyone, regardless of their gender expression or identity. We support this whilst appreciating and understanding that sometimes, even with the best of intentions, you or colleagues may get things wrong or say the wrong thing. But this is better than not having the conversation at all, and we encourage clergy to learn from any mistakes and be supportive of each other whilst navigating these potentially sensitive conversations.
- 6.5.3. Partners, family members or friends of those experiencing menopause-related symptoms or conditions are often also affected, and you are encouraged to talk to your Archdeacon or HR and/or seek external support if this is affecting your work, wellbeing, or attendance.

## Aims

6.5.4. This policy is part of our overall aim to put clergy wellbeing at the heart of what we do. It applies to all Diocese of Truro licensed office holders, stipendiary and non-stipendiary, and Ordinands, and sets out the guidelines for you and Archdeacons on providing and getting the right support to manage menopausal symptoms at work. It does not form part of your Statement of Particulars but you are expected to follow the guidance and principles.

6.5.5. Specifically, it aims to:

- Foster an environment in which clergy can openly and comfortably instigate conversations, or engage in discussions about, menopause;
- Ensure that our clergy understand what menopause is, can confidently have good conversations, and are clear on our policy and practices;
- Educate and inform those who have management responsibilities about the potential symptoms of menopause, and how they can support people they work with;
- Ensure that those suffering with menopause symptoms feel confident to discuss it, and to ask for support and any reasonable adjustments so they can continue to be successful in their roles, whilst respecting;
- Reduce absenteeism due to menopausal symptoms; and
- Assure our office holders, employees, volunteers and the communities in which we work that we are a responsible organisation and employer, committed to supporting their needs during menopause.

## Definitions

6.5.6. *Menopause* is defined as a biological stage in a woman's life that occurs when she stops menstruating, and reaches the end of her natural reproductive life. Usually, it is defined as having occurred when a woman has not had a period for twelve consecutive months (for women reaching menopause naturally). The average age for a woman to reach menopause is 51, however, it can be earlier or later than this due to surgery, illness or other reasons. People who are non-binary, trans or intersex, and who may not identify as a woman, may also experience menopausal symptoms. This policy therefore applies to anyone experiencing the menopause, regardless of their gender expression or identity.

6.5.7. *Perimenopause* is the time leading up to menopause when a person may experience changes, such as irregular periods or other menopausal symptoms. This can be years before menopause.

6.5.8. *Post menopause* is the time after menopause has occurred, starting when the person has not had a period for twelve consecutive months.

## Menopause symptoms

- 6.5.9. It is important to note that not every woman will notice every symptom, or even any symptom, or need help or support. However, 80% of women will experience some symptoms and at least a quarter will experience severe symptoms such as hot flushes, insomnia and low mood.
- 6.5.10. The symptoms are many and varied, and can be both physical and psychological. They include hot flushes, poor concentration, tiredness, headaches, panic attacks, heavy/light periods, anxiety, loss of confidence and self-esteem, mood swings, difficulty sleeping, heart palpitations, excessive sweating, and weight gain.

### Roles and responsibilities

- 6.5.11. Office holders - as an office holder, you are responsible for:

- Taking a personal responsibility to look after your own health;
- Being open and honest in conversations with your Archdeacon or other senior clergy as far as you feel able to do so (if you are unable to do so, for whatever reasons, you can speak directly to HR or any senior TDBF colleague) - don't suffer in silence;
- Contributing to a respectful and productive working environment;
- Being willing to help and support colleagues (including PCC members), whilst respecting that not everyone will be willing or feel able to talk about the subject or their symptoms;
- Understanding any necessary adjustments a colleague may receive or need because of their menopausal symptoms.

More guidance and a checklist is at Annex 6c.

- 6.5.12. Managers and Training Incumbents - Clergy may manage volunteers or staff, or other clergy. Anyone in this position has additional responsibilities to:

- Familiarise themselves with this policy and guidance;
- Be prepared to challenge or "call out" inappropriate behaviour or language that causes, or may cause, someone to feel excluded, offended, or embarrassed;
- Be ready and willing to have open discussions about menopause, appreciating the personal nature of the conversation, and treating the

- discussion sensitively and professionally, without labelling or making judgements about someone just because they are menopausal;
  - Use the guidance in Annex 6c, signposting and reviewing together, before agreeing with the individual how best they can be supported, and any adjustments required;
  - Record adjustments agreed, and actions to be implemented, in writing, and share these with the individual; and
  - Ensure that all agreed adjustments are implemented, and there is ongoing dialogue and review dates.
- 6.5.13. Sometimes, adjustments may not be successful, or symptoms prove to be more problematic, in which case the manager may consider asking the individual's GP for further advice, or an Occupational Health Advisor. After a referral, they should, with the individual, review the advice received, and implement adjustments where reasonably practical.
- 6.5.14. Bishop's Senior Leadership Team (including Archdeacons) - The senior leadership is responsible for:
- leading and role modelling the management behaviours set out in this policy;
  - ensuring that the facilities and adjustments needed to support menopausal clergy are in place wherever practical; and
  - championing the organisation as a menopause friendly employer.
- 6.5.15. Human Resources - HR is responsible for:
- the review and implementation of this policy;
  - providing support on the interpretation of this policy and guidance;
  - sourcing any training required;
  - ensuring the policy is communicated to office holders and that it is kept up to date; and
  - monitoring and evaluating the effectiveness of this policy in respect of related absence levels and performance.

#### **Further support and management**

- 6.5.16. Self-management, with support from the organisation, managers, and colleagues, will help to manage symptoms. Annex D lists organisations providing support and resources.

### **6.6 TRADE UNION OR PROFESSIONAL ASSOCIATION MEMBERSHIP**

- 6.6.1 It is a matter for individual decision, but all clergy are entitled, and supported, to be a member of a Trade Union or Professional Association. As a member, you may be represented or accompanied (where appropriate and allowed) by the relevant representative in matters affecting you as an individual, e.g. grievance hearing.

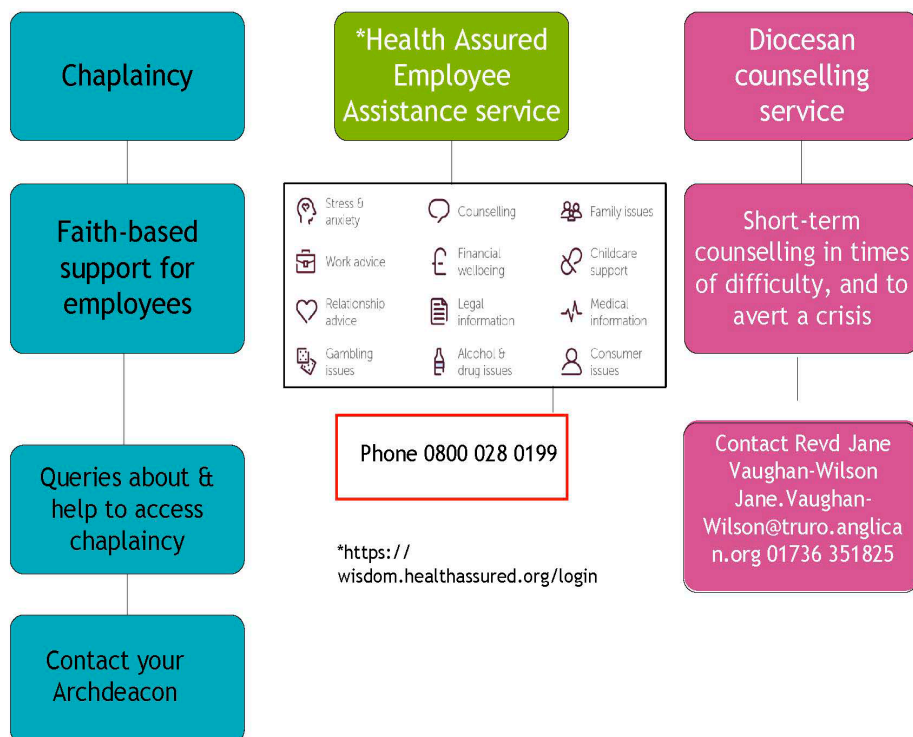
## Annex 6a Self-Certificated Sick Absence Form (Clergy)

To be completed for up to the first 7 days or less of any period of sick absence

| PART A: TO BE COMPLETED BY CLERGY MEMBER   |  |
|--|--|
| Name:  |  |
| Date of first day of absence:  |  |
| Reason for absence:  |  |
| Was your absence due to an accident or incident at work? If YES, please give details.  | YES <input type="checkbox"/> NO <input type="checkbox"/> |
| Was your absence related to a disability? If YES, please give details  | YES <input type="checkbox"/> NO <input type="checkbox"/> |
| Was your absence pregnancy-related?  | YES <input type="checkbox"/> NO <input type="checkbox"/> |
| No. of calendar days absence covered by this certificate (up to 7 only):   |  |
| Date of return to work (if returned)   |  |
| Signed:  | Date:  |
| <b>PLEASE NOW FORWARD TO YOUR ARCHDEACON OR TRAINING INCUMBENT (via rural dean if appropriate)</b>                                     |  |
| PART B: TO BE COMPLETED BY ARCHDEACON/TRAINING INCUMBENT   |  |
| Please add notes of any discussion had with the individual, including reasons for absence, and detail any outcomes or actions:         |  |
|  |  |
| Noted/recorded date:   |  |
| Signature/Name:  |  |
| <b>PLEASE NOW FORWARD TO LESLEY FUSHER ASAP <a href="mailto:lesley.fusher@trurodioese.org.uk">lesley.fusher@trurodioese.org.uk</a></b> |  |

## Annex 6b Confidential support services

### Confidential support services available for clergy and your families



Health Assured website:

<https://healthassured.eap.co.uk/>

Organisation code: MHA111198

## Annex 6c     Clergy menopause checklist guidance

To support yourself and others:

- ☑ Can people easily sit near a window or away from a heater/radiator in church or meeting rooms?
- ☑ Is there easy access to drinking water? Is this availability communicated and promoted?
- ☑ Have a dress code that allows for loose and relaxed clothing.
- ☑ Do people have access to a rest room for breaks or a private quiet area, e.g. if someone needed to manage a severe hot flush?
- ☑ Have regular breaks in meetings.
- ☑ Provide an outdoor space at church and office locations for work and breaks if possible
- ☑ Allowing online meeting attendees to turn off their cameras.
- ☑ Consider temperature control for your work area or church - are fans available?
- ☑ Allow time out to take medication if needed, and for this to take effect.
- ☑ Challenge those who belittle, judge or joke about the menopause or its symptoms.
- ☑ Have permanent access to washroom facilities at offices and in church where possible.
- ☑ Have storage space available for a change of clothing.
- ☑ Provide free sanitary items and publicise this.
- ☑ Have a small supply of new sealed underwear in churches or offices that women can access if needed.
- ☑ Consider flexible working, including later start times, particularly if you or someone is suffering from a lack of sleep.
- ☑ Make more use of home working and online meeting options.
- ☑ Agree time out from others, when required, without needing to ask for permission, or identify a 'time out space' for them to be able to go to 'clear their head.'
- ☑ Use, or encourage colleagues to make use of, one of our confidential support services, including the Diocesan counselling service or the Health Assured helpline on 0800 0305182 or online [here](#)
- ☑ Ensure you have regular 1-2-1's with your Archdeacon and/or Rural Dean
- ☑ If there are times of the day when concentration is better or worse, adjust working patterns/practice accordingly.
- ☑ Think about using or providing notebooks, apps, or software (e.g. Microsoft Focus or To Do) for lists, action boards, or other memory-assisting equipment or resources
- ☑ Think about how interruptions could be reduced.
- ☑ Consider undertaking mindfulness activities such as breathing exercises, or physical activities such as going for a walk.
- ☑ Be aware how your own way of working may contribute to the anxiety levels or symptoms of others, e.g. scheduling things at the last minute, forgetting to include them in an email, etc.

## Annex 6d Further menopause support and information

- [Employee Assistance Programme](#) - All clergy and their family can access counselling and additional wellbeing and health resources provided by Health Assured by contacting the Employee Assistance helpline on 0800 030 5182 or online.
- [Diocesan Counselling service](#)
- [National Institute for Health and Care Excellence \(NICE\) guidelines](#). These explain how your GP will determine what types of treatments and interventions they can offer you.
- [NHS](#) - The NHS provides an overview of menopause.
- [Royal College of Obstetricians and Gynaecologists](#) The College offers further information in a dedicated area of their website.
- [Menopause Matters](#) - independent website providing up-to-date, accurate information about the menopause, menopausal symptoms and treatment options. They also published a monthly magazine.
- [Henpicked](#) - This organisation provides information on managing menopause, and an insight into women's stories. They also run the employer accreditations and membership scheme Menopause Friendly Employer.
- Your GP - there are various websites offering advice on how to prepare for, and have, a discussion with your GP, for example see [here](#) or [here](#).
- [34 Menopause Symptoms](#) - an article listing what are viewed as the 34 main symptoms.
- [The Daisy Network](#) information and support on Premature Ovarian Insufficiency (POI) and very early menopause.
- [Hysterectomy Association](#) This provides an insight into surgically induced menopause because of having a hysterectomy.
- Clergy Clothing - some companies sell clothing with the menopause symptoms in mind, e.g. [Lotties](#).
- Diocese of Truro Clergy Wellbeing Group - let our group know how this policy is working and how we can improve our clergy menopausal support.

## 7. PERSONAL AND MINISTERIAL DEVELOPMENT

- 7.1. The Terms of Service/Common Tenure arrangements confer on clergy a responsibility to undertake regular reviews and a programme of on-going professional ministerial development.
- 7.2. Obviously much will depend on you, your experiences, and your own needs, which will vary over the years. The Diocese will do all it can to support you in your continuing formation, within the budget allocated for this.
- 7.3. Development opportunities, including webinars, courses and grants, are offered through the Continuing Ministerial Development (CMD) programme and Accompanied Ministry Development (AMD) programme. More information can be obtained from the Diocesan Ministry team and the regular newsletter “Ministry Matters”.
- 7.4. In addition to on-going conversations with your Archdeacon, spiritual adviser and colleagues, you will have a more formal bi-annual Ministerial Development Review (MDR) with an authorised MDR Facilitator, with whom you will be matched by the Bishop’s office. The Bishop’s office is responsible for sending out the necessary paperwork and advising on the MDR process. Following your conversation with the MDR facilitator you will be invited to meet with a Bishop or your Archdeacon. You can find more information about the MDR process on the here.
- 7.5. Clergy who have been ordained for at least ten years, and been in their present post for at least two years, are eligible to apply for Extended Ministry Development Leave (EMDL), sometimes also known as a sabbatical. Not a holiday, this is nevertheless an opportunity to step back from the normal demands of ministry and take time to reflect on your current ministry and look to what the future may be. Usually an EMDL will be up to three months duration, and you should seek to incorporate times for education, retreat, relaxation and travel.
- 7.6. Information on how to apply for EMDL can be found in the EMDL policy and application form.

## 8 DISCIPLINE AND CONDUCT

### 8.1 CONDUCT

- 8.1.1 We expect our clergy to maintain the highest standards of professional conduct in line with the national Church of England guidelines [here](#).

### 8.2 FOLLOWING UP CONCERNS

- 8.2.1 Under existing ecclesiastical regulations the Clergy Discipline Measure (CDM) sets out very clear processes through which serious disciplinary issues will be followed up. The procedures for a formal CDM issue are set out in the Code of Practice, which is agreed by both the Archbishop's Council and the General Synod and can be accessed through the Church Commissioner's website [here](#).

- 8.2.2 From time to time however, complaints or issues of concern about individual members of clergy are brought to the attention of the Bishop or to members of their senior staff that may not result in, or warrant, the formal CDM-based process. This may be through the [Diocese complaints policy](#) or another way, but it is important that each is followed up:

- within fair, transparent and informal due process
- with pastoral sensitivity; and
- in a way in which all parties are afforded the opportunity to share or report their concerns; and
- individuals against whom allegations are made have the right to be represented and a right of reply.

- 8.2.3 The guidelines below set out how we will follow up issues or complaints brought to their attention through an informal 6-step clear process of investigation and follow up.

- 8.2.4 The process is based both on the current pre-formal capability procedure within the Terms of Service/Common Tenure arrangements, and also on the national ACAS guidelines which focus on the responsibility of organisations to work more effectively to bring about informal resolution to a situation. It ensures that:

- time is set aside to gain a clearer picture of all the issues raised;
- where possible, reconciliation is achieved;
- support and advice can be given; based on fair and reasonable processes and clarity of judgements and decisions;
- managed within a clear time frame to ensure that any subsequent formal complaint cannot be deemed out of time; and
- properly documented including the taking and sharing of notes of all meetings with the individuals concerned

- 8.2.5 It should be remembered that any informal process may, either during the process or at a later date move into a formal CDM process if it seems appropriate to do so, e.g. more serious allegations come to light. Documentary evidence is therefore a key part in any assessment of a fair legal/formal process or of its timing - especially if this is related to a later CDM process, so at all stages of proper paperwork, notes, records etc. should be kept.

### **Diocesan principles of accountability**

- 8.2.6 In all processes, we will ensure that we respect the individuals involved and their individual circumstances. We will ensure that:

- They fully understand all aspects of the processes available to them, and us, and the possible outcomes; and that they have the opportunity to explore these in confidence at every stage.
- They are aware of the range of pastoral and practical support available.
- They are made aware of timescales and next steps as informal processes are created and worked through and that these are managed consistently, and as quickly and fairly as possible.
- They are aware of theirs and others' roles and responsibilities, and of their right to be accompanied at any meeting if they so wish.

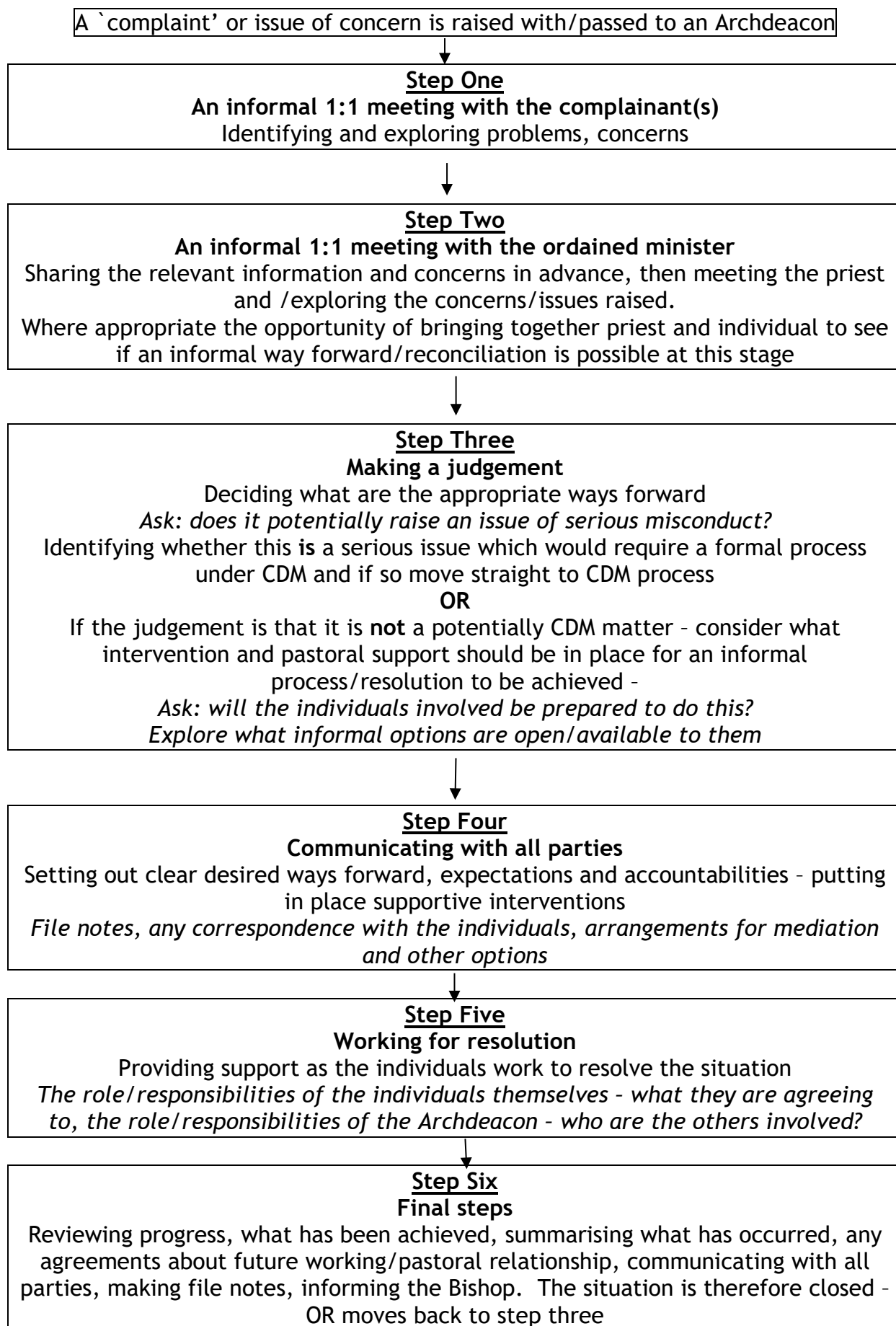
- 8.2.7 When things go awry with relationships both personally and in local communities, our priority will always be to do what we can to bring people together in order to help restore relationships. We will plan to do this with the individuals concerned in safe, creative and thoughtful ways which ensure respect, fair process, the right to be heard, and the right of reply.

- 8.2.8 Confident that clergy are determined to live out the commitments and promises they made at ordination, we have three key expectations on those who find themselves in situations of conflict or against whom accusations of improper conduct have been made:

- That they will do all that they can to bring about a local resolution;
- That where bringing about local reconciliation is a struggle (for whatever reason), and where additional advice, and support may be helpful, that they actively seek this from colleagues, national bodies, and the diocese; and
- that they will fully co-operate with the diocese in its responsibility to seek and facilitate all opportunities for reconciliation (e.g. through mediation).

### **Process and steps**

- 8.2.9 An overview of the process, and details of each of the steps taken at each stage are set out below.



## Process at each stage

### 8.2.10 Further details regarding the six steps are below.

NB. Steps one and two would normally be conducted by an Archdeacon, but the Archdeacon may wish to consider also using the skills of a Rural Dean, or an appropriate member of the Episcopal College or SLT to undertake these steps, and to report back to the Archdeacon for a decision at Step Three based on what has arisen from the preliminary enquiries.

#### **Step One An informal 1:1 meeting with the complainant(s)**

- The Archdeacon invites the complainant(s) to an informal meeting (at which they may be accompanied if they wish).
- The Archdeacon may, depending on the circumstances, may ask another appropriate member of The Episcopal College and/or or the person providing HR advice to be present at this meeting. They should also have a note-taker present to enable them to focus on chairing the meeting.
- At this meeting the complaint(s) should be explored and an informal note of what is discussed made (and depending on the circumstances details regarding the formal and informal processes of CDM are shared if this seems appropriate at this time). Nothing should be said or done at this stage that could prejudice the Diocese's freedom to act appropriately at a later stage.
- Depending on the nature of the complaint(s) it may be appropriate at this step to explore how the complainant would want to see the situation resolved. It might therefore be appropriate to explore if the complainant would be willing to meet with the priest in an informal way in the spirit of reconciliation; or to ensure that in some circumstances that they understand their recourse to a formal process in the most serious of cases.

#### **Step Two - An informal meeting with the priest**

- The Archdeacon should contact the ordained minister, ideally face-to-face, and let them know that an issue has arisen, and invite them to attend an informal meeting at which the concerns can be explored.
- The Archdeacon or HR will send any relevant statements or documents to the minister in confidence (they may share them with only close family or their representative).
- The ordained minister should be able to bring a colleague or union representative (not a family member) to the meeting if they wish.
- The Archdeacon will outline what the concerns are, check the individual understands them, and seek their response. The meeting may also explore

some possible ways forward, although it is not the Archdeacon's role to pass comment, or make a judgement on the complaint or allegations at this stage.

- The Archdeacon may, depending on the circumstances, invite another appropriate member of The Episcopal College, and/or the person providing HR advice, or other appropriate local senior colleague to be present at this meeting.
- After the meeting, the Archdeacon should agree notes of what was discussed and send them to the clergy member for any comment/info.
- It may be appropriate at this step, depending on circumstance, the nature of the issues/concerns raised, the individuals involved, and/or the necessity to follow up with further 'investigatory' discussions, to follow up the outcomes of discussions in Step One to bring the priest and the complainant(s) together in the spirit of reconciliation if both parties are willing.

### **Step Three - making a judgement and ways forward**

- The Archdeacon may feel at this stage that they require some further enquiries for information or clarification that would enable them to make a better judgement about possible ways forward - and they may want to seek information from a third party, other appropriate person/people, and/or ask for some advice and/or support from the Registrar.
- Each situation will be different, and the Archdeacon may make a judgement about offering a short period of special paid leave where appropriate, to enable the further investigatory discussions to take place.
- Each situation will be different, but following the meeting (step 2) and any follow up enquiries that have been made - the Archdeacon should make a judgement about the appropriate way forward. This decision should be communicated to the complainant(s) and to the priest, either in person or by phone, and followed up by letter.
- If, on the evidence, the Archdeacon feels that in their judgement it is NOT a matter of serious professional misconduct (i.e. a CDM matter) they may decide that the way forward is for an informal process of resolution and reconciliation to be undertaken.
- If on the evidence, the Archdeacon feels that in their judgement this IS a matter of potential serious professional misconduct they may decide that the way forward is for a formal CDM complaint to be made and due process should then be followed in line with statutory requirements.
- If the Archdeacon requires some advice on help to establish whether this is a potentially serious issue or an issue possibly better suited to an informal

resolution - they make ask another e.g. the Rural Dean or a member of the Episcopal College to review the situation and current evidence with them. The person providing HR advice can advise on the process for this.

#### **Step Four - communicating with both parties**

- The letter setting out the Archdeacon's decision (see Step Three above) and the desired next steps may include:
- details of any training/development support that is required or available
- a possible timeframe
- any arrangements for external support such as mediation or facilitation
- a date at which progress can be reviewed
- the pastoral support that is available for all parties
- a request that both complainant and the ordained minister reply to the letter that they are content for this to be the way ahead, and confirming their willingness to participate in it.
- The Archdeacon may decide, depending on the circumstances that they want to make it clear in the feedback and follow up letter to the ordained minister that whilst a formal complaint under CDM is not taking place, that the situation does raise serious concerns and that their full co-operation is required in the way forward decided upon.
- It is very important at this stage that there is a clear file note/report detailing the issues, copies of the letters, and of the plan for the desired way forward.
- In correspondence/discussion with the complainant, at this stage, the Archdeacon should make them aware of his judgement in the circumstances, but also of the complainant's right to bring a proper complaint through the appropriate formal processes.
- The Archdeacon should explain the formal process and explore potential outcomes - so that the complainant can be aware of the Archdeacon's judgement and the proposed way forward.

#### **Step Five - working for resolution**

- Both the complainant(s) and the priest should be given the appropriate time to work through the Archdeacon's reporting and the agreed way forward. Where for good reason more time might be needed then the progress review meeting may be rescheduled, with agreement from all parties.

#### **Step Six - final steps**

- If at the agreed date to review and reflect on progress both the complainant and the priest are content that there is reconciliation or

resolution - the issue is closed. The Archdeacon will write a file note summing up what has occurred since the original file note was made.

- At any review/progress meeting the ordained minister has the right to be accompanied by a colleague or union representative (but not a family member).
- At the end of a (successful) process, the Archdeacon will send a letter to all parties outlining what has occurred, giving his thanks for participation and engagement in the process, and of his hope for them in the future.
- The Archdeacon may, depending on the nature of the issue, send a copy of the summing up note to the Bishop who may feel that an informal meeting with the priest to help him/her reflect on the situation would be appropriate.

### 8.2.11 Possible Outcomes

|  |   |
|--|---|
| The situation is satisfactorily resolved   | No further action is necessary.<br>The Bishop may want to meet the ordained minister priest and/or the complainant to review what has happened.   |
| The situation is resolved but with some potential remaining issues or the possibilities of recurrence, or with reservations on either side | A further formal meeting with either party is convened by the Archdeacon to set out a clear set of expected behaviours in moving forwards.<br><br>The Bishop may want to meet the ordained minister and/or the complainant to review what has happened.   |
| The situation is not resolved  | A further formal meeting individually with the complainant, and the ordained minister is arranged by the Archdeacon with the person who provides HR advice present to explore possible next steps.  |
| The situation is satisfactorily resolved but recurs  | Depending on the circumstances:<br>A further formal meeting individually with the complainant and the ordained minister is arranged by the Archdeacon with the person providing HR advice present to explore possible next steps,<br>Or<br>A <u>formal CDM</u> complaint is brought for disciplinary matters<br>Or<br>A <u>formal capability process</u> is instigated for performance matter |

## 8.3 CLERGY DISCIPLINE MEASURE

- ### 8.3.1
- For serious disciplinary matters, or for when the six-step process has been exhausted or terminated, the Clergy Discipline Measures will be followed

[here](#). It should be noted that the timescales given are the maximum length of time allowed. The CDM process can be stressful for all parties concerned and every effort must be made to undertake the process as quickly, and to be as transparent, as possible.

## **Publicity**

- 8.3.2 The CDM Code of Practice emphasises that it is important that the Church be open about any misconduct that has taken place. Tribunals therefore announce their decisions in public, giving reasons for their decision. For penalties imposed by the Bishop of Truro, there will always be an expectation and preference for transparency, but he/she reserves the right not to make public all or some information if there are genuine and strong pastoral reasons for not doing so.

## **9 GRIEVANCE PROCEDURE**

### **Introduction**

- 8.1. We want office holders to feel assured that there is a way of raising their concerns that is both confidential, and fair in process. The aim of the grievance procedure is to ensure these complaints can be dealt with in timely, fair, and focused ways, where all parties have the right to be heard, and grievances pursued without the fear of inappropriate sanction.
- 8.2. If you have a grievance it will always be treated seriously and in line with them Church of England Grievance Procedure. We will seek to follow Supporting Advice where this is feasible and practical. We will always try and seek the agreement of the person making the grievance to the course of action being followed if this departs from the Code. Our priority will always be to deal with issues informally wherever possible

### **When the grievance process may be used**

- 8.3. The process may provide a means of addressing clergy concerns (either informally first or moving straight to a formal process). The following list is not exhaustive but may relate to:
- The interpretation and application of terms and conditions of service
  - Housing
  - Ministerial Development Reviews
  - Continuing Ministerial Education (CMED)
  - Provision of suitable training etc
  - The behaviour or conduct of a PCC member
- 8.4. The process may be invoked by an individual during a capability or disciplinary process, but that process will not be suspended while the grievance is considered. Where the grievance relates to the handling of the capability procedure the appeal process there should be followed.

### **When the grievance process may not be used**

- 8.5. The process should not be used where other forms of appeal or representation are available. These include grievances or complaints:
- about the conduct or performance of a clergy member or DBF employee (this will be considered under Section 8 or the TDBF staff disciplinary policy);
  - against a capability or disciplinary decision (the relevant appeals process applies);
  - decisions taken under faculty jurisdiction;
  - statutory rights of objection in respect of proposals for certain housing transactions;
  - about pastoral reorganisation plans; or

- against an individual employed by another organisation (that organisation's processes should be used in this instance).

## Overview

- 8.6. Where a grievance may involve the alleged actions of a respondent, whether individual or a body, the respondent will be given every opportunity to express a view, and that view be taken into account. If informal approaches prove incapable of resolving a problem, the formal procedure may be invoked by the office holder (see below).
- 8.7. The Diocese will always do what it can to bring people together, for reconciliation, and will support issues being resolved at a local level, informally, and with support and pastoral care.
- 8.8. The Diocese always wants to learn from experiences, and where there are issues the Episcopal College will review each set of circumstances to make improvements, and learn lessons, review any trends etc. The Bishop may also want to appoint appropriate people to undertake reviews at particular times.
- 8.9. Training or coaching in different aspects of grievance procedures will be made available to those undertaking reviews or taking part in the process.
- 8.10. The diocese may seek Registrar or HR advice as appropriate at any stage of a grievance process.
- 8.11. Where theological tradition might be an issue, it may also be helpful to include representation of the relevant traditions within a group involved in a particular process or to seek an 'expert' panel member.
- 8.12. The Bishop of Truro will make appropriate independent, pastoral and confidential support available to those taking out a grievance, those who are the subject of a grievance, and those who are having to deal with a grievance.
- 8.13. During grievance processes, written records will be made which will include:
  - the nature of the grievance raised
  - a copy of the written statement of grievance
  - any decisions and actions by the Archdeacon or grievance panel
  - whether the matter was taken to the further stage and if so what support or external interventions were put in place, and any outcomes
  - subsequent developments
- 8.14. Records will be treated as confidential and kept securely in a sealed envelope on the relevant file(s)

- 8.15. Office holders and respondents have the right to be accompanied at all meetings concerning a grievance by a trade union official, or a lay or ordained colleague. Where appropriate, local or external support and expertise may be appropriate, e.g. through trained support colleagues, mediators, facilitators.

## 8.16. Summary flow chart and detailed overview of grievance procedure

| Stage   | Action   |
|---|--|
| <b>INFORMAL STAGE</b>   | <p>An office holder should in the first instance discuss their grievance with the person responsible for the matters which have given rise to concerns. If this is not appropriate or is unsuccessful the office holder should raise the matter with the Rural Dean, the person responsible for their Ministerial Development Review or another suitable person to explore other ways of seeking informal resolutions.</p> <p>Following the <b>Diocesan 6-step informal follow up process</b> (set out in Section 8 of this handbook) it is hoped that the diocese can be prompt in response, review and reconciliation or other satisfactory outcome.</p> <p>There will normally be appropriate to agree any remedial arrangements and a period of time for them to take effect before the office holder pursue a more formal process (under Stage One below). However the office holder may move directly to Stage One below if becomes evident that the other party is failing to observe their part in any agreed remedial arrangements.</p> |
| <b>FORMAL STAGE ONE</b><br>Putting the grievance in writing   | <b>Step 1</b> - The office holder should set out their grievance in writing, include details of what steps have been taken to try and resolve the matter, and what acceptable routes to a resolution they would consider and send their statement to the Archdeacon (unless the Archdeacon is already concerned, in which case the matter should be referred to the Diocesan Bishop).  |
| <b>STAGE TWO</b><br>Facilitated resolve<br><br>Exploring the situation by a named person, seeking views, prior to deciding how to take things forward | <p><b>Step 1</b> - The Bishop or Archdeacon may feel that the matter can be appropriately handled by another person (e.g. Suffragan Bishop, Dean etc) and may, after consulting the office holder, refer the matter accordingly.</p> <p><b>Step 2</b> - The Archdeacon (or other) shall make enquiries into the matters raised in the written statement and allow all parties to express their views. The person providing HR advice and Archdeacon shall convene a meeting and invite the office holder to discuss the grievance (to which their union representative or other colleague should be invited).</p> <p><b>Step 3</b> - if the grievance is directed at a respondent, that person or body should be invited to express a view, and that view must</p>   |

| Stage   | Action   |
|---|--|
|   | <p>be taken into account at the meeting. Judgement will need to be made by the Archdeacon (or other) as to when parties should be seen together (if bringing them together too soon will inflame things). The respondent too has the right to be accompanied by a lay or ordained colleague.</p> <p><b>Step 4</b> -As soon as possible after the meeting, the Archdeacon (or other) shall inform the office holder in writing of their decision as to whether there is substance in the matters raised in the statement of grievance and if so what steps they are taking or proposes to take to resolve the matter</p>  |
| <p><b>STAGE THREE</b><br/>Formal grievance considered by senior clergy, prior to formal recommendations of ways forward.</p> <p>Following the suggested checklist for holding a stage three hearing as set out in the code of practice.</p> | <p><b>Step 1</b> - An office holder wishing to move to this stage of the Procedure shall inform the Archdeacon (or other) in writing, stating their reasons.</p> <p><b>Step 2</b> - The Archdeacon (or other) shall refer the matter to a senior member of clergy or to a small group of people including a senior member of clergy. The office holder shall be invited to attend a meeting to be held as soon as possible, with their union representative or other colleague and to discuss their grievance further.</p> <p><b>Step 3</b> - Where a grievance is directed at a respondent, that person or body should be invited to express a view, and that view must be taken into account at the meeting. Judgement will need to be made by the Archdeacon (or other) as to when parties should be seen together (if bringing them together too soon will inflame things). The respondent too has the right to be accompanied by a lay or ordained colleague.</p> <p><b>Step 4</b> -As soon as possible after the meeting the senior member of clergy (chairing the small group), shall inform the office holder in writing of their decision as to whether there is substance in the matters raised in the statement of grievance and if so what steps they are taking or propose to take to resolve the matter.</p> |

### Outcomes

- 8.17. It may be that the outcome of a grievance process may be unsatisfactory to some, or that the grievance itself may remain unresolved. The Diocese will ensure sensitive handling and the provision of pastoral care for all involved.

## 10 CAPABILITY

### Introduction

- 9.1 It is not possible to be good at everything. However, sometimes a clergy member's performance may fall, or not meet, the standard required for the role. This may be in one or two key areas, or across many.
- 9.2 Where an issue is a one-off or uncharacteristic, there may be no capability issue, but a member of the Episcopal College, usually the Archdeacon, may talk through with the individual what occurred, or what has been observed, and the changes required, in order to ensure that any practical or pastoral support is made available.
- 9.3 Where this is not the case, the Bishop may make the decision to move into the capability process. This is not a decision they take lightly.
- 9.4 The key principles underpinning the process are:
- Access to policies and guidelines;
  - Fair and due process but also reflecting "natural justice";
  - Right to reasonable support, advice and training/guidance;
  - Right to be accompanied/of representation;
  - Right of reply;
  - Right of appeal;
  - Pastoral care and support;
  - Right to object to membership of a panel on grounds of alleged partiality);
  - Support through sickness absence or critical illness including reasonable adjustments if there is a disability
  - 'Career' /HR advice and support for opportunities for seeking alternative work outside the Church where appropriate, e.g. through the [Clergy Transitions Service](#)

### Capability procedures overview

- 9.5 The procedures for a capability process are set out in a [Code of Practice](#) agreed by both Archbishop's Council and General Synod. The Church of England has also produced a recommended set of guidance notes and supporting advice [here](#).
- 9.6 Capability procedures within the church require that clergy have at least the equivalent protection applicable for secular employees where processes require:
- a written statement of grounds/issues
  - a meeting with the right of representation, followed by a decision; and
  - right of appeal.

- 9.7 As a last resort, a member of clergy may be dismissed under the capability procedure. Any office holder under Common Tenure who is removed from office in this way has the right to make a claim in an employment tribunal on ground of unfair dismissal.
- 9.8 A tribunal which finds a dismissal was unfair has the power to award compensation, or, if practicable, can make an order for the office holder to be reinstated in his or her post.

### **Explaining Capability**

- 9.9 The Code of Practice and supporting advice make it clear that the procedures have been developed in ways that put the emphasis on the hope that the minister will be able to recover and restore their ministry with clear diocesan guidance, timelines, and support in place. Only when this has proved not be the possible, will a minister be removed from that office.
- 9.10 The provision of ministry within the diocese is the responsibility of the Diocesan Bishop and the proper use of a capability process falls within this scope. The Bishop may appoint a suitably competent person to act on their behalf in these matters, particularly in the early stages, and this will be made clear to the individual at the outset.
- 9.11 Capability is about ***what you do and how you do it*** and then how this is demonstrated over a sustained period of time (so it is not possible to dismiss someone as an outcome of a single meeting). In assessing what is an accepted minimum the Archdeacon and/or Bishop will take into account the requirements of the Ordinal, Codes of Professional Behaviour, appropriate ecclesiastical offices/measures, and the specific requirements which are detailed in an individual's Roles and Responsibilities document or role description.
- 9.12 It is not expected that a capability process would come out of the blue. Conversations about issues of capability or performance should have taken place already, albeit in informal ways, and about ways in which to improve. Ministerial Development Reviews may also have picked up on issues in their own distinct self-contained settings.
- 9.13 Whether a capability issue has come out of the blue or not, the informal part of the capability process allows for discussions to take place and recovery/improvement to happen before anything more formal has to be put in place.
- 9.14 It is important not to confuse capability with disciplinary processes. The key points are:
- Principally capability processes are designed to help and support people to deal with poor performance before things become more serious and ensuring that there is clarity about what is expected.

- Disciplinary processes deal with issues of professional misconduct. The diocese is committed to resolving issues informally wherever this is possible, and will follow our diocesan informal process (see section 8) when following up a complaint or issue in the first instance before any formal Clergy Discipline Measure (CDM) complaint is made (if this is deemed appropriate).
  - Where a complaint is potentially of such seriousness or where an initial complaint of such seriousness is received at the outset then a CDM complaint will be brought following the Church of England's required process.
  - Under no circumstances will a capability process and a disciplinary-related process be conducted simultaneously on the same matter or issues.
- 9.15 In determining ways forward in a process, an individual may require additional training, support, coaching or counselling, and we will put in place what is reasonable in each set of circumstances in order to help the individual realise their full potential.
- 9.16 A capability issue may reflect a mismatch between the requirements of the role and the person doing it - in a specific situation. Thus a capability process in one set of circumstances will not prejudge the individual in terms of them being more than capable of doing a job in another situation.
- 9.17 Worked through carefully, a capability process will ensure that an individual is clear:
- About the nature of the process, its stages, and who is involved;
  - What the issues are and where it has been determined that they may have fallen short;
  - What their Roles and Responsibilities document and their broader professional codes of practice requires of them;
  - What is required in order for them to improve;
  - What resources the diocese will make available to them;
  - What the timescales and expectations are;
  - How decisions are made;
  - Their rights throughout, including representation and appeal; and
  - About the expectation on them to actively participate in the process.

## 11 WHISTLEBLOWING

- 10.1 The Diocese of Truro is committed to upholding the highest possible standards of integrity and recognises that clergy, lay staff and volunteers are often the first to become aware of, or identify, serious concerns. The Public Interest Disclosure Act 1998 (the 'Act') protects workers who raise concerns from victimisation or harassment, where there is a public interest in so doing. In accordance with the Act, the Diocese of Truro welcomes clergy who have serious concerns about any aspect of the Diocese's work to come forward and voice those concerns, in confidence, within the Diocese. Our whistle blowing policy and process is on our website [here](#).

## 12 IT AND COMMUNICATIONS

### 12.1 DATA PROTECTION AND IT SECURITY

#### Provision of IT equipment and other resources

- 12.1.1** Clergy are usually required to provide and use their own mobile phone, printer, laptop, tablet, PC etc. for work. Exceptionally, where you are provided with some equipment, you are expected to adhere to Diocese policy and procedures relating to it and use it solely for business reasons, unless it is an emergency. Where possible you should not incur unexpected additional costs, for example purchasing additional software or services. The Archdeacon or appropriate budget holder should approve any additional costs prior to purchase.
- 12.1.2** You may use the IT resources at Church House, and DBF staff are available to help you to do this. Additional equipment for talks or events such as laptops, speakers, projectors, screens and cabling are available for loan from Church House. They should be booked in advance with the Operations team.
- 12.1.3** Any item of official property that is damaged or lost due to negligence on your part must be repaired or replaced at your expense.

#### IT and data protection

- 12.1.4** Clergy may hold personal data on their PCs and other devices that might relate to individuals within their parishes, databases of PCC's, funerals, weddings, baptisms and so on. The use of your own devices to create and process information and data related to your role creates issues that need to be addressed, particularly related to data security and compliance data protection legislation.
- 12.1.5** There is a guide for parishes on issues of data protection, GDPR, registration and compliance [here](#).
- 12.1.6** Clergy are regarded under Data Protection Law as the Data Controller (see [here](#)). This confers on you the highest level of responsibilities for keeping and using data under GDPR legislation. See [here](#) for more information.
- 12.1.7** On a practical level, you should take all reasonable steps to:
- Familiarise yourself with your devices and their security features so that you can ensure the safety of the information you hold;
  - Maintain the device, ensuring it is regularly patched and upgraded;
  - Ensure that the device is not used for any purpose that would be at odds with the Diocesan policy on the "Use of Email and Internet" or Church of England policies;
  - Ensure that no one else has access to your work email account

- Use email addresses that reflect your name rather than your position or geographical location, for example: revjosmith@gmail.com rather than foweyvicar@gmail.com
- Prevent theft and loss of data, e.g. keep a laptop in a secure place when not in use, not leaving devices on display in a car, ensuring the screen automatically locks when not in use, etc;
- Keep information confidential where appropriate;
- Take responsibility for any software you download onto your device;
- Set up passwords, passcodes, passkeys or biometric equivalents of sufficient length and complexity for the particular type of device;
- Set up remote wipe facilities if available and implement a remote wipe if you lose the device;
- Use cloud based storage for your files and emails, eg. OneDrive, iCloud, GoogleDocs, etc, and avoid using memory sticks unless they are encrypted;
- Not hold any more information than is necessary and in line with current Diocese data management guidelines - be especially aware of sensitive, personal or confidential information, or that which may be of commercial value;
- Carry out regular “housekeeping” and delete any information as soon as possible once it is no longer required, including information contained within emails;
- Report the loss of any device containing Diocese or PCC data (including email) or security breach to your Archdeacon or the Data Protection Manager at Church House immediately (there is a legal requirement to report data loss under the General Data Protection Regulations); and
- Ensure that all data is erased completely if a device is disposed of, or sold/transferred to a third party

### **Impact on wellbeing**

**12.1.8** Because clergy often have access to their work emails, web sites, etc in the same way and on the same device as for personal emails or messages, this can potentially have a negative impact on your life-work balance. You are strongly encouraged to find ways to avoid this happening, for example:

- using a different email client and/or address for work and personal emails,
- removing badges, icons and other notifications for work emails;
- adding your normal working days and hours to your email signature;
- Use your out of office messages on emails and phone to provide alternative points of contact in your absence;
- having a personal email address as well as one for your ministry work, and letting us know what this is so if you are away or on sick leave we can use this if needed for urgent or person matters so you don’t need to check your work emails.

## **12.2 DEALING WITH THE MEDIA**

**12.2.1** There will be times when you will receive approaches from the news media. Be aware that researchers and journalists may try a number of ways

to get a story. Please consider whether you are able to comment on behalf of the whole diocese and if in doubt please contact the Communications team at Church House, a member of which is available 24-7. It is best to avoid 'off the record' conversations with media.

#### 12.2.2 The following tips may be useful:

- Behave calmly and professionally - avoid being defensive or hostile;
- If you are approached as you come into work or as you are leaving your home, and you do not feel able to speak, politely decline to comment;
- Ask the journalist for their contact details;
- Get in touch with the Communications team and pass on the journalist's details;
- If you are being vigorously pursued by a journalist you don't need to answer the door to someone you don't know or don't want to speak to;
- Be cautious when answering telephone calls. A journalist may pretend to be someone from the diocese. If you do not know the caller, ask for their number and say you or a member of the Communications team will call back.
- The Communications team will offer professional support and advice on all aspects of media handling. If you are concerned, please call them.

#### **Out and about**

12.2.3 You should be very careful about discussing confidential or sensitive work matters in public places - in a pub or café, on the bus, with neighbours etc. As an ambassador for the diocese and the Church of England, the way you talk, and what you talk about, reflects on all.

### 12.3 SOCIAL MEDIA GUIDELINES

12.3.1 Many people use social media as part of their ministry. The Diocese and the wider Church embraces this, acknowledging the value of social media as an important tool in mission, as a way we can connect with people, and build relationships with those we might struggle to reach through other channels.

12.3.2 Social media is immediate, interactive, conversational and open-ended. This sets it apart from other forms of communication and demands a different approach. As well as the many opportunities, you should also be aware of (though not put off by) the associated risks.

12.3.3 The guidelines at Annex 11a are to help clergy active on social media (or thinking about it) fulfill, with confidence, their role as online ambassadors for their local parish, the wider Church and our Christian faith. All are based on principles of common sense and good judgment. Essentially, you should participate online in the same way as you would in any other public forum. Your actions should be consistent with your work and Christian values and you are responsible for the things you do, say or write.

## ANNEX 12a Social media: guidelines and tips

### 1. Don't rush in

The immediacy of social media is one of its benefits - you can respond quickly to questions, correct misunderstandings, give our perspective about a breaking story in the news media. Responding quickly doesn't mean doing so without due consideration. Before posting always think:

- Is this my story to share?
- Would I want a parent to read this?
- Would I want God to read this?
- Would I want this on the front page of a newspaper?

These points applies even before you start posting your own content. Spend a while listening to others, getting a feel for the tone in that particular forum, giving thought to how you might participate.

### 2. Transient yet permanent

Social media updates are immediate and will outdate quickly BUT they can have a more lasting impact and you should assume that anything you post is permanent. Even if you delete it later on, it may have been seen and re-published or referred to elsewhere.

### 3. You're an ambassador

Whatever you think, if you are ordained, lead in or are employed by the Church, others will see you in your public role as a representative of the Church. If talking about a church matter, make it clear that these are your personal opinions and not those of the Church of England or the Diocese. If you are in any doubt, don't post.

### 4. Don't hide

Anonymity and 'hiding' behind aliases when using social media is frowned upon. It's also at odds with what we consider the main reason for using social media networks. How can anyone really connect with an alias? On any social media platform, if you choose a username or profile different to your real name, include brief personal details in the about section.

When the account is a shared one, for example, a Facebook page for your parish, ensure people can easily find out who is responsible for the content.

### 5. Blurring of public/private life boundaries

In everyday ministry, the distinction between public duties and private life is difficult to draw. It is no different online. There are risks associated with personal opinions being seen as public statements, a minister's private life being invaded and the difficulties of detaching from work. Consider setting up different accounts for ministry and personal use to help set definite boundaries. Learn how to use privacy settings and use them wisely.

## **6. Safeguarding**

The informality that social media encourages can mean that it might be harder to maintain a professional distance that is required when working with children, young people and the vulnerable. Communicating directly online with someone, for example with private messaging, is like meeting them in private. You're advised to send messages to groups, rather than individuals, or share them publicly.

## **7. Stay within the legal framework**

Whilst sharing thoughts and reflections with friends or followers via social media can seem personal and private, it is not. By law, if one or more people can access it, content is classed as published, in the public domain and subject to legislation around libel, defamation, copyright and data protection. If you wouldn't say something in a public meeting or to someone's face or write it in a newspaper or on headed paper - don't say it online.

Be aware that the Code of Conduct for Pastoral Ministry, the Clergy Discipline Measure and standards and policies stipulated in the Diocesan Staff Handbook also apply.

## **8. Confidentiality**

Use of social media does not change the Church's understanding of confidentiality. Within the life of the Church there are private meetings and conversations, particularly in terms of pastoral work. Breaking confidentiality is as wrong as it would be in any other context. Arguably, it is worse as via social media a broken confidence could spread rapidly and be impossible to retract. Remember: Is this story mine to share? If in doubt, don't.

## **9. Be mindful of your own security**

Don't overshare personal information. Never publish detailed personal information such as your address or telephone number, unless in a private message to someone you know and trust.

For advice and guidance on any aspect of social media, please contact the Diocesan Communications team or your Archdeacon. For more information and resources for clergy and parishes see the Diocese website social media resources page [here](#).

## 13 CURATES

### 13.1 INTRODUCTION

- 13.1.1 The Diocese is committed to training roles that offer the broadest high-quality opportunities for ministry development, each supported according to an individual's needs.
- 13.1.2 The Head of Ministry oversees the IME Phase 2 programme, which is managed by the IME Phase 2 Officer and supported by other staff, including the Diocesan Director of Ordinands. A Handbook for curates and training incumbents describes the programme and provides details of the training in each year as well as the assessment requirements and other procedures. IME Phase 2 normally lasts between three and four years.
- 13.1.3 The IME Phase 2 Handbook and other material is available [here](#) on the diocesan website.

### 13.2 STATEMENT OF PARTICULARS

- 13.2.1 Curates can be appointed on either a stipendiary or self-supporting ministry (SSM) basis. On appointment to a curacy role, individuals will have a clear Statement of Particulars that sets out the detail and arrangements for the role (see Section 3). All curacy posts are held under Qualified Common Tenure, which are time-limited posts. Under these terms, where a curacy needs to be extended (e.g. because of maternity leave), a revised training programme will be agreed by the Diocesan Director of Ordinands, in consultation with other relevant staff or clergy. If necessary a revised Statement of Particulars may be issued.
- 13.2.2 Training incumbents, the Head of Ministry, the Diocesan Director of Ordinands (DDO) and IME Phase 2 Officer will also be able to give advice on key aspects of the role.
- 13.2.3 For those appointed on a SSM basis the Statement of Particulars will set out the detail and arrangements for that training role based on what is realistic for the individual's circumstances. The Director of Ministry will discuss with an individual their expectations in terms of training and formation. It is expected however that the SSM curate will still make every effort to attend IME events, learn and develop.

### 13.3 WORKING AGREEMENT

- 13.3.1 Alongside a curate's Common Tenure licence and Statement of Particulars, curates complete a Working Agreement with their Training Incumbent at the beginning of the curacy. The Working Agreement is reviewed and agreed annually.

## 13.4 TRAINING, DEVELOPMENT AND SUPPORT

13.4.1 Training and ministerial development opportunities and ongoing reviews, supervision and guidance are part of the curacy arrangements. There may also be times when further specific training and support are required, when for example:

- an individual may be struggling in a particular area;
- pastoral/local/domestic circumstances have changed;
- there are issues of disability or long term sickness absence; or
- during the fourth year of curacy, an individual has not secured a permanent role.

13.4.2 We will do all that it can during these times to be sensitive and will work with the curate and the training incumbent to put into place additional support. Support will be tailored to individual circumstances but may include, for example:

- health advice with occupational health support and guidance;
- reasonable adjustment for a temporary or permanent disability;
- specialist support for a particular aspect of ministry; and/pr
- one to one HR advice with pre interview practices, support with CV's and interview skills.

13.4.3 If an issue does come up for which additional support and guidance may be appropriate, either the training incumbent or the curate themselves should contact the IME Phase 2 Officer in the first instance.

## 14 HOUSE FOR DUTY CLERGY

### 14.1 INTRODUCTION

14.1.1 House for Duty clergy are normally licensed in the Diocese as associate ministers together with a priest in charge. House for Duty clergy, priests in charge and authorised lay ministers' work together as a ministerial team in a cluster of parishes.

14.1.2 For each appointment, arrangements will be set out within two documents:

- A Statement of Particulars - referring to the terms under which the appointment is made issued by the Archdeacons at the outset of an appointment, and
- A roles and responsibilities document is also provided which should outline most relevant details. In some circumstances it is helpful to have a working agreement in place within a certain period.

### 14.2 OVERVIEW

14.2.1 House for Duty clergy are usually provided with a designated diocesan property, but can choose to live in their own property if this has been agreed in line with our housing policy.

14.2.2 All House for Duty clergy will be required to participate in any Ministerial Review processes; and CMD events (see 7 below).

14.2.3 Where administrative or other support is locally available/shared, the details of how this works this will be clearly outlined at the beginning of an appointment, or if developed during an appointment will be updated within the Working Agreement.

### 14.3 COMMITMENTS AND WORKING AGREEMENTS

14.3.1 Whilst the amount of time will vary according to the individual circumstance, the usual expected commitment will be the equivalent of three days (including Sundays). The working agreement should specify on which days of the week under normal circumstances the priest is definitely on duty and on which days they are definitely off duty. A degree of flexibility will be desirable. For defined off-duty days there is no requirement for the priest to be in residence within the parish.

14.3.2 Within a Working Agreement an agreed monthly pattern should be set out. It may be necessary to consider modifying long established patterns of worship so as to suit the new situation. The agreement should indicate the extent of the responsibility of the House for Duty priest for the ordering and leading of services.

14.3.3 There is an expectation that the House for Duty clergy should attend specific meetings such as the PCC, benefice staff meetings, and Deanery Chapters.

Other meetings can be agreed through the Working Agreement (such as Synods). Such meetings will be regarded as being within the priest's working week.

- 14.3.4 Where tasks and ministry is shared this must be clearly set out to help ensure clarity of role, boundaries etc.

#### 14.4 EXPENSES AND FEES

- 14.4.1 Resettlement expenses (moving) at the outset of an office being taken up will be met by the diocese in line with the current removal and expenses policy. Removal expenses at the end of a post where this is not to another ministerial post will be met by the individual.
- 14.4.2 All expenses relating to the work undertaken in the office should be reimbursed by the relevant PCCs as for all other clergy. The way in which telephone charges are reimbursed should be negotiated within the cluster/benefice.
- 14.4.3 For occasional offices, the diocesan parochial fees policy states that for a House for Duty priest officiating at an occasional service in the benefice to which they are licensed, a fee is payable to them of 80% of the DBF fee. Please see detailed information on our website [here](#).

#### 14.5 HOLIDAYS AND TIME OFF

- 14.5.1 All clergy are encouraged to have proper time for family, friends, and refreshment. House for Duty clergy are entitled to the same holiday arrangements as stipendiary clergy, pro rated as appropriate.
- 14.5.2 The House for Duty priest must arrange holidays in collaboration with other clergy/the incumbent in the cluster/benefice. Churchwardens must be informed of any arrangements for cover. It is the responsibility of PCC(s) to pay any fees and travelling expenses incurred by covering ministers taking services.

#### 14.6 SICKNESS AND ABSENCE

- 14.6.1 The diocese has policies and processes (in this Handbook) in place to support clergy during, sickness critical illness and those experiencing health and wellbeing difficulties.
- 14.6.2 Although not in receipt of a stipend, clergy in House for Duty roles are still expected to report any absence due to ill health to their Team Leader/Rural Dean and Archdeacon as soon as possible so that the diocese can see what support can be offered both pastorally and practically. They

should submit a self-certificated absence form for 7 days or less, or a GP fit note for longer periods.

**14.6.3** In the event of long-term sickness, Occupational Health advice will be sought to support them in their absence and a return to work.

**14.6.4** The diocese will support self-supporting clergy during longer periods of ill health by:

- keeping communication lines open (where agreed with the individual)
- offering the Diocesan counselling service
- working with them to secure a return to work (e.g. By making reasonable adjustments, reducing their workload, undertaking the appropriate risk assessment, providing relevant coaching or training)

## **14.7 OPPORTUNITIES FOR CONTINUING MINISTERIAL DEVELOPMENT**

**14.7.1** All House for Duty clergy are expected to participate in diocesan events and it should be recognised that any time given to this will be regarded as part of normal working week arrangements. Involvement in such activities will be supported financially by the diocese on the same basis as for an incumbent.

## **15 SELF-SUPPORTING CLERGY (SSMs)**

### **15.1 INTRODUCTION**

- 15.1.1** Self-supporting clergy are those ministers who do not receive any stipend for their work. They may continue in their paid employment, be retired on a pension, or be financially supported by a partner or have independent means.
- 15.1.2** We offer the same training and qualifications to those who are self-supporting as those who work in stipendiary posts.

### **15.2 COMMITMENTS AND WORKING AGREEMENTS**

- 15.2.1** At the outset of an appointment, arrangements will be set out within A Statement of Particulars, referring to the terms under which the appointment is made; and either a Roles and Responsibility document (sometimes known as a working agreement) or role description. The latter should be reviewed one year after taking up the appointment with either the incumbent or Rural Dean.
- 15.2.2** Every situation will be different depending on the individual's circumstances and the Working Agreement/role description will reflect this, being realistic about what can be offered by the priest in that situation to enable realistic expectations in the parish(es).
- 15.2.3** There is no expectation self-supporting clergy should attend specific meetings but where they are able this is encouraged - such as the PCC, benefice staff meetings, and Deanery Chapters. Other meetings can be agreed (e.g. Synods). Such meetings will be regarded as being within the priest's working week.
- 15.2.4** Where tasks and ministry is shared this must be clearly set out to help ensure clarity of role, boundaries etc.
- 15.2.5** Throughout the period of the office, the Archdeacon will ensure that each member of clergy (and their incumbent where appropriate) will have an up to date Working Agreement/role description.
- 15.2.6** All SSM clergy are required to participate in the diocesan Ministerial Review and CMD events and processes that they are able to through their given individual circumstances, as agreed.

### **15.3 FAMILY FRIENDLY POLICIES AND GUIDELINES**

- 15.3.1** Whilst maternity leave and pay and other family friendly policies are not always appropriate to non-stipendiary clergy, the Diocese will follow the spirit of such guidelines wherever practical. For information on time off for maternity, paternity, parental and caring situations and how these can be

supported appropriately in parish settings, clergy should contact their incumbent where appropriate, Rural Dean, Archdeacon or HR.

- 15.3.2** Any permanent changes to working arrangements should be agreed with the incumbent where appropriate, or Rural Dean or Archdeacon and documented in a revised Statement of Particulars and Working Agreement and issued by the relevant Archdeacon.

#### **15.4 EXPENSES AND FEES**

- 15.4.1** All SSMs are entitled to retain 80% of the DBF fee for occasional offices. However, all expenses relating to the work undertaken in the office will be paid by the benefice and should be submitted to the appropriate treasurer(s) at regular intervals. Details of expectations regarding the reimbursement of expenses should be identified in the Working Agreement.

#### **15.5 HOLIDAYS AND TIME OFF**

- 15.5.1** All clergy are encouraged to have proper time for family, friends, and refreshment. Self-supporting clergy should agree in advance with colleagues regarding their times of holiday or other leave.

#### **15.6 SICKNESS AND ABSENCE**

- 15.6.1** The diocese has policies and processes (in this Handbook) in place to support clergy during, sickness critical illness and those experiencing health and wellbeing difficulties.
- 15.6.2** Although not in receipt of a stipend, SSM clergy are still expected to report any absence due to ill health to their Team Leader/Rural Dean and Archdeacon as soon as possible so that the diocese can see what support can be offered both pastorally and practically. They should submit a self-certificated absence form for 7 days or less, or a GP fit note for longer periods.
- 15.6.3** In the event of long-term sickness, Occupational Health advice will be sought to support them in their absence and a return to work.
- 15.6.4** The diocese will support self-supporting clergy during longer periods of ill health by:
- keeping communication lines open (where agreed with the individual)
  - offering the Diocesan counselling service
  - working with them to secure a return to work (e.g. By making reasonable adjustments, reducing their workload, undertaking the appropriate risk assessment, providing relevant coaching or training)

## 16 LEAVING OR ENDING A CLERGY ROLE

### 16.1 RESIGNATION

- 16.1.1 You may resign from a Common Tenure role, but you are expected to give three months' notice to the Bishop in writing, giving notice of your intention to resign, copied to the relevant Archdeacon. The notice period may be waived or reduced with permission from the Bishop.
- 16.1.2 You will be sent a Deed of Resignation form, which will need to be witnessed, and returned to the Bishop's Office. If you are taking up a new office holding role, the departure date should be the same day as your licensing in the new post for stipend continuity.
- 16.1.3 If you are moving to a new post you are encouraged to take any accrued but untaken annual leave for the year in question before you leave. If this is not possible or practical, untaken annual leave may be paid with the final stipend payment.

### 16.2 END OF CONTRACT

- 16.2.1 If you are in post in one of the limited categories of fixed or limited term appointments, it will end at the end of the term.

### 16.3 REMOVAL FROM OFFICE

- 16.3.1 Those holding office on Common Tenure may only be removed from office through the discipline or capability procedures, or the operation of the Mission and Pastoral Measure 2011 (see 16.4).

### 16.4 PASTORAL REORGANISATION

- 16.4.1 The only mechanism for making clergy office holders 'redundant' is through [pastoral reorganisation](#). Priests in charge are eligible for compensation for loss of office if they are displaced because of pastoral reorganisation. In certain specified cases, it is possible for an appointment to be held for a fixed term under Regulation 29. The termination of such an appointment at the end of the fixed term will not amount to redundancy and will not carry any right to compensation.

### 16.5 RETIREMENT

- 16.5.1 Those who hold office under Common Tenure are currently required to retire at 70. By the time you reach this age you may have already retired from office and will be exercising ministry on the basis of permission to officiate (PTO) which does not commit you to carry out any regular ministry.

- 16.5.2** However, sometimes it may be appropriate for an office holder to remain in office beyond 70. Regulation 29A of the Regulations (see guidance [here](#)) makes provision for this. To enable someone over 70 to exercise a ministry other than through PTO, the archbishop or bishop will need to issue a direction to that effect. The direction will authorise the holding of the office for a time-limited period. This is subject to an occupational health assessment confirming that the person in question will be capable of performing the duties of the office throughout the period for which they are to hold the office.
- 16.5.3** It is your responsibility to inform the Pensions Board of the date of your retirement, preferably at the same time as you send your resignation form to the Bishop. You should complete the application forms for payment of pension that they may be countersigned by the Bishop as soon as possible.
- 16.5.4** The Bishop's Office will ensure that the media, usually the Church Times, are notified of your retirement on receipt of your resignation, unless you request otherwise, and Crockfords are also notified.
- 16.5.5** If there is an unexpected delay in the availability of your retirement property it may be possible for you to stay on in your existing Diocese property or another one for a time. If this situation is likely to arise you should contact your Archdeacon as early as possible.
- 16.5.6** The Diocese and The Church of England recognise that retiring can present considerable financial and other challenges. The Church of England can support you in finding a new home if this is the case, and you are encouraged to contact their housing team as soon as you start thinking of retirement plans, several years before your planned retirement date. For more information, see [here](#). The Diocese also provides pre-retirement course, wellbeing support, and other resources for clergy approaching or thinking about retirement or reducing their hours.
- 16.5.7** Retiring clergy are encouraged to take accrued but untaken annual leave for before they leave. If this is not possible or practical, untaken annual leave may be paid with the final stipend payment.

## **16.6 SPECIAL AGREEMENTS**

- 16.6.1** Occasionally an office holder may leave a post on a voluntary basis, outside of the usual arrangements above, when there is a "Special Agreement" (see policy at Annex 16a put in place. This is usually with some form of benefit paid by the DBF. These are similar to settlement agreements that can be reached to end lay employment.

## **16.7 DEATH IN OFFICE**

- 16.7.1** Sadly, sometimes a death in office can occur. This is for the spouse or partner, in all situations, a great tragedy and time of difficulty for not only for the bereaved partner, but also for the family, and members of the

church and local community. Diocesan staff, and the Archdeacons in particular, will work carefully to balance the needs of the bereaved family with the needs of the parish and the house as a focus for future ministry.

- 16.7.2 Following the death of a serving clergy person, the spouse or partner, and any dependent family living at the house at the time of death, will be able to remain living in, and/or have access to, the property for a period of up to six months subject to an agreed tenancy agreement. Throughout this time, the Archdeacon (or Bishop) will work closely with the family to discuss and consider their future housing needs, providing whatever support they are able.
- 16.7.3 In the case of a single occupancy, the closest family, executors or other legal representatives may need to have access to the property, usually to clear it of personal belongings. The Archdeacon or Bishop, or persons delegated by them, will agree to named persons having this access, on terms agreed with the individuals, for up to two months. This includes seeking proof of identity, times and dates of access, and whether visits will need to be accompanied by a Diocesan employee, clergy member or approved contractor.
- 16.7.4 There are likely to be contents in the property that could belong to the parish or Diocese, or indeed could contain matters that are sensitive or confidential pastoral information. The churchwardens and Archdeacons (or Bishop) will liaise with the partner or other family members about how and when to identify and retrieve these in a prompt but sensitive manner.
- 16.7.5 The care of bereaved dependents is one of our primary concerns at this time. The Diocese will fund up to £3,000 towards the costs of the funeral for stipendiary or house for duty clergy who have died in post. The funeral director should send a copy of the invoice to the Diocesan Secretary and the TDBF will then make payment of the invoice, or the £3,000 contribution, direct to the funeral director.
- 16.7.6 Pastoral support may be provided if required by the Bishop who will nominate someone who has been through a similar situation to walk alongside them. The immediate family will also continue to have access for six months to the confidential support services available to all clergy and families.
- 16.7.7 HR will liaise with the family or nominated representative about outstanding stipend payments, and pension benefits, but queries about pensions should be addressed directly to The Church of England Pensions Board on 020 7898 1800 or email [pensions@churchofengland.org](mailto:pensions@churchofengland.org). The Pensions Board are also able to advise on DWP benefits.
- 16.7.8 The TDBF will make a financial contribution towards moving costs of up to £2,000. The Clergy Support Trust will also consider grants to assist with removals. It is important to contact them as soon as the decision to move has been taken. The Trust will also consider wider support on application,

for example help with medical matters, welfare grants or longer term counselling if needed, especially where children are involved. See [www.clergysupport.org.uk](http://www.clergysupport.org.uk)

- 16.7.9 Any other specific requirements or expectations the family may have beyond the above should be discussed fully and openly with the Archdeacon or Bishop. Anyone else wishing to have continuing access to the property should contact the relevant person as soon as possible. The Diocese is committed to treating such requests reasonably and sensitively.

## ANNEX 16a: WHEN CLERGY CHOOSE TO MOVE - POLICY AND GUIDANCE FOR “SPECIAL AGREEMENTS”

### 1. Introduction

This document sets out the approach of the Diocese of Truro when an office holder leaves a post on a voluntary basis, typically outside of the usual arrangements or retirement or appointment to another post, and when there is a “Special Agreement” (see definition in Annex B) put in place, usually with some form of benefit paid by the DBF.

Our intention in making this policy and guidance available is to be as transparent and fair as possible. Conversations with individuals will often have to be confidential, but the framework and general terms under which Special Agreements may be made should not be secret.

### 2. Who does this apply to?

This policy covers all ordained clergy office holders, including:

- Stipendiary office holders
- Archdeacons
- House for duty clergy

It does not cover:

- Those with permission to officiate or a public preacher licence
- Self-supporting ministers
- Curates

### 3. When does this apply, and not apply?

Canon Law and the specific arrangements of Common Tenure set out the rights of an office holder to resign their office. Nothing in this policy and guidance is intended to limit or curtail those rights. However, there may be circumstances where it is right to explore other arrangements that can bring about an outcome that is in the interests of both the individual and the diocese.

The list below is not exhaustive, but this policy and guidance may apply when:

- An individual wants to explore other forms of work or ministry outside of stipendiary ministry but which is otherwise in the wider interests of the diocese;
- When exploring early retirement, but not on health grounds;
- When their wellbeing or that of their family would be better served other than in stipendiary ministry; or
- When they themselves want to facilitate changes in local ministry

This policy **does not** apply in every case of a clergy office holder leaving a post. For instance, this policy and Special Agreements along these lines are not usually appropriate in the following cases:

- Dispossession through pastoral reorganisation
- Age retirement
- Ill health retirement under the clergy pension scheme
- Removal from office, for instance under the Clergy Discipline Measure
- Normal resignation when simply moving to another role

#### **4. Principles**

- Having a conversation, or series of conversations, does not imply any judgement or commitment on either side, and are normally held on a without prejudice basis.
- Taking part in a discussion about a potential agreement is voluntary. Declining to participate or not agreeing to an offer will not be held against an individual. The diocese or the individual may choose to end the conversations at any point.
- The use of “confidential conversations” and “special agreements” should be when other more usual routes have been followed or processes exhausted; they are not to be considered lightly or as the norm. We explain what we mean by “confidential conversations” and “special agreements” below in Annex B
- Confidentiality is key. Unless a settlement agreement is reached, no documents relating to conversations about it will be placed on an individual's blue file, unless they request this
- Our aim is to treat all individuals fairly and with respect
- Either party may withdraw from the discussion or negotiation at any time up to the point at which an agreement is signed.
- Deciding what to offer in an agreement is at the discretion of the diocesan Bishop or person delegated by them, in line with the criteria specified below.

#### **5. How do the conversations start?**

Either party, the diocese or the individual, may initiate the conversation. Individuals may ask someone to begin the conversation on their behalf. The Archdeacon will usually be responsible for the conversation on behalf of the diocese. The Archdeacon, supported by the Director of HR, will use the questions in Annex A to decide if this policy and guidance is appropriate, or if the situation needs a different approach.

#### **6. The interests of the Diocese, and what we will take into account**

It is important that diocesan leaders and those acting on their behalf are honest and transparent about the things that we will take into account in conversations and agreements under this policy. The diocese will aim to act justly and with integrity in balancing the interests of the individual with the interests of the diocese, deanery and parish.

The diocese will take the wellbeing and interests of the individual into account. As part of exercising the bishop's proper pastoral concern and

care, we will undertake to make sure that individuals have access to independent pastoral and legal support.

The diocese will take the fruitfulness and sustainability of the ministry of the church into account, as detailed in key diocesan strategic documents, particularly in the communities and deanery served by the individual. The bishop has a responsibility for ensuring that the church offers appropriate ministry throughout the diocese, and the Diocesan Board of Finance has charitable objects that are allied to the support and fulfilment of that ministry.

When considering housing, the diocese will remember that individual parsonages exist to support the ministry of the church. We will also take into account the following:

- The reasons behind the proposal
- Affordability and proportionality
- Precedent and practice
- National Church of England guidance
- Relevant employment legislation

## **7. The Process (see flowchart at Annex C)**

Once the Archdeacon, supported by the Director of HR, is clear that this policy applies (see Annex A) and that the individual has been made aware of this guidance and has appropriate pastoral support, then a confidential conversation may take place.

The arrangements for a Special Agreement, including discussion of any payment etc, will form part of the “confidential conversation”. It is important that the Archdeacon keeps a record of what is discussed, even if in brief note form, and this will typically be shared with the individual.

When the specific terms of a possible Special Agreement are being considered the Archdeacon will consult the Diocesan Secretary, the Director of HR and the Bishop.

When deciding what to offer and agree to in relation to the above, the diocese will always endeavour to be fair and consistent, and will give the individual reasons for any decisions. However, it is important to note that every individual case and people’s needs are different, so any agreements will be tailored accordingly. There is no “one size fits all”.

Once the Archdeacon, in consultation with other diocesan officers, and the individual are in broad agreement about the terms of a potential Special Agreement, then a “draft Special Agreement” will be agreed. At this point, the diocese will make a contribution of up to £350 for the individual to receive independent legal advice on the draft.

There may be further confidential conversations, the individual may choose to withdraw from the process, or at this point we may move to put the Special Agreement in place and discuss detailed timings and communications.

## **8. What might be offered in a Special Agreement**

The diocese typically offer clergy who are retiring or otherwise resigning one month rent-free in the parsonage (where one is provided) with Council Tax paid. This, or the financial equivalent, is a realistic starting point. At the other end of the scale, the “entitlement” to an office holder who is “dispossessed” following pastoral reorganisation is one year’s stipend and pension contributions, and one year’s accommodation (not necessarily in the parsonage house). However, the level of compensation that is potentially payable under the Mission and Pastoral Measure in respect of dispossession cases will not usually be appropriate for office holders in other circumstances.

Any or all of the following payments or benefits may form part of an individual’s settlement offer or agreement:

- Payment in lieu of notice
- Payment of annual leave accrued in the calendar year but not taken
- Compensation payment
- A right to remain in current accommodation for a defined period
- Contribution to, or reimbursement of, other accommodation
- Payment of utilities, Council Tax or other defined expenses whilst remaining in accommodation above
- Payment into individual’s pension scheme
- Training or education course fees or expenses (e.g. subscriptions)
- Professional membership fees
- Counselling fees
- Coaching or mentoring fees and expenses
- An agreed employment reference
- Outplacement service (e.g. transitions service)
- Independent financial planning advice

## **9. Roles and responsibilities**

Diocesan Secretary - has responsibility for approving final terms of an agreement  
Episcopal College - To maintain confidentiality, it is likely that Episcopal College as a whole may not always be aware of individual “confidential conversations” taking place. When a draft special agreement is being considered the Diocesan Secretary, Director of HR and the Bishop will be consulted by the Archdeacon. When an agreement is reached the broad terms of the agreement will usually be reported to Episcopal College. Episcopal College will review the general terms of Special Agreements annually, and implement appropriate learning from this.  
Remuneration Committee - All Special Agreements will be reported to the Diocesan Remuneration Committee in an anonymised form, but the level of any payment or benefit will be described along with the broad reasons for the decision.

Bishops Diocesan Council - The BDC will make provision for potential Special Agreements within the usual budgeting process, but are not involved in any decision making or review, unless the Remuneration Committee refer a matter to them. The total cash value of benefits or benefits in kind advanced through Special Agreements will be reported to BDC annually for information, along with the total number of Special Agreements within that time.

## **Special Agreements policy Annex A - Does this policy and guidance apply?**

Before proceeding under this policy and guidance the Archdeacon will address these questions, it is usually appropriate for them to share this thinking with the individual.

**Is the individual's post subject to, or likely to be subject to a "Scheme" for pastoral re-organisation that may result in the dispossession of the individual?**

If it is, then this policy may not be appropriate, in any case, the individual should be made aware of their rights under the Mission and Pastoral Measure 2011 and associated Code of Recommended Practice, should have pastoral and legal support available to them, and should be clear about the process for pastoral reorganisation. With all this in place, the individual may request that they proceed under this policy and the Archdeacon may agree to that, or without prejudice, either may choose not to do so.

**Although not likely to be subject to a Scheme as above, is the post part of planning or likely planning, or other reorganisation, that would be enabled by a move?**

This can be a strong reason for proceeding with this policy. The Archdeacon will need to be assured that the individual does not feel under undue or inappropriate pressure to proceed, and the individual should be offered legal and pastoral support. The Archdeacon will expect to take the deanery plan into account and should not be relying on planning or likely planning that has not, for instance, been considered by the deanery standing committee.

**Is the proposal mainly about dealing with a capability issue?**

Capability issues, local disputes, and other pastoral or professional conduct matters should usually be dealt with in other ways; this policy is likely only to be appropriate when those have been exhausted and there are other strong reasons for proceeding under this policy.

**Is the individual subject to a complaint under the Clergy Discipline Measure 2001 (CDM)?**

Work within the CDM is part of a statutory formal process which will take precedence over this policy. If, within the CDM procedure, a settlement or special agreement is considered then it is possible that this policy may inform that work.

**Is there a pastoral concern for the individual or their family that relates to wellbeing or the DBF's duty of care? Would it be reasonable to argue that leaving the post under the provisions of this policy would be guided by a genuine *and proportionate* pastoral concern?**

This may be a strong reason for proceeding with this policy, particularly if leaving the post is a proportionate response to those concerns.

**Would it be more appropriate for the proposal to be dealt with as a normal retirement either on the grounds of the individual have reached normal retirement age or ill health?**

The terms under which an individual may retire at aged 70 or on ill health grounds may be more beneficial than those that would be offered under a Special Agreement so it is important that this option is considered before any discussion starts. However, a Special Agreement might be relevant in the case of an early retirement.

## Special Agreements policy Annex B: Definitions

*“Special Agreement”* - these are similar to “Settlement Agreements” in employment law, they are agreements used when an individual and the Bishop (usually through the Archdeacon) agrees that leaving their role is in the best interests of both the individual and the diocese. It contains details of any financial or other benefits to the individual, and the legal rights, responsibilities and obligations of each party. These agreements are legally binding, confidential, may only be disclosed to others as identified in the agreement, and both parties sign it to this effect.

*“Confidential Conversation”* - these are similar in intention and content to “protected conversations” in employment law, but they do not have the same legal status. As such, they start from a place of mutual trust and good faith to which all parties are expected to adhere.

## Special Agreements policy Annex C - Steps in the process

