

Part 3: Guidance Notes

SECTION A: THE CARE OF CHURCHES

Section A: The Care of Churches

1. Faculty Jurisdiction

Introduction

Why does the Church of England need the Faculty system as laid down in the Care of Churches and Ecclesiastical Jurisdiction Measure 1991? There are several reasons, but most importantly it means that Church of England buildings that are in use for worship, and the land surrounding them, enjoy exemption from secular Listed Building Consent. The Church of England has over 16,000 ecclesiastical buildings and almost 13,000 of these (including 174 in the Diocese of Southwark) are listed.

The State, in the form of the Department of Culture, Media and Sport (DCMS) regards this exemption as a privilege and various attempts have been made to remove or limit it. Those within the church with experience of both the ecclesiastical and the secular systems appreciate the advantages that the church has because of this exemption and over the past few years have fought hard to retain it.

In the early 1990's concerns were expressed that some listed churches (not necessarily belonging to the Church of England) were being neglected and the overall ecclesiastical exemption that had been applicable to all churches was put under close scrutiny. The proposal to withdraw ecclesiastical exemption was strongly opposed by the Church of England authorities, including representatives of the Diocese of Southwark. In the end a compromise was reached. On the 1st October 1994 the law changed and, although listed church buildings belonging to the Church of England still enjoy exemption, any structure fixed to the outside of a church, or within the church curtilage, that is listed in its own right is no longer exempt from Listed Building Consent. This means that a listed tomb in the churchyard is now subject to the full rigours of both the secular and ecclesiastical systems. Some other denominations have lost the ecclesiastical exemption altogether and face severe problems now that they fall within secular jurisdiction. Others have retained the exemption only on the understanding that they set up systems similar to the Faculty procedure. In 1997, the ecclesiastical exemption was again reviewed on behalf of the DCMS and various

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recommendations put forward. Regular reviews are expected in the future.

An important part of the Faculty procedure is the opportunity that it gives members of the congregation (and other interested parties) to object to the work that is being proposed. If someone objects to the proposed work, then they may make representations to the Diocesan Chancellor. He will consider these representations alongside the proposal before deciding whether the work should be allowed to go ahead. For controversial matters, the Chancellor will convene a fully Consistory Court where the various parties for and against the proposals may come and put their case.

The Incumbent and congregation do not 'own' the church building: they are, effectively, holding it in trust for future generations of worshippers and are responsible for maintaining it during their time. Regrettably, experience shows that work carried out in the past (even with the best intentions) can cause serious problems in the future if not carried out correctly or through the use of inappropriate materials. This is particularly true in historic buildings. A beautiful re-ordering scheme that takes out all the pews and lays foam-backed wall-to-wall carpeting throughout the worship areas may lead to immense problems with dampness in the original floor below. The use of most modern paints on walls that do not have damp-proof courses can lead to the breakdown of the existing plaster through dampness within a short period of time.

Another reason for the Faculty system is to allow for an independent check to be made on the work that a parish is proposing. This is carried out by the Diocesan Advisory Committee (DAC) who look at all proposals before parishes apply for a Faculty. The DAC is made up of experts in various fields (architects, artists, specialists in archaeology, bells, organs, lighting, sound systems, etc.) plus lay and ordained representatives from around the Diocese. The members give their services freely and their task is to advise the Chancellor on the merits (or otherwise) of proposals put before him. In cases where the DAC is unhappy with the proposals or some aspect of them, the reasons will be communicated to the parish, and if necessary, members of the DAC will work with the parish and its professional advisers to find a solution to the problem.

The members of the DAC are also happy to work with parishes at an early stage in their planning and to use their considerable experience in church building to help the parish find the best solutions. This service is used by many parishes and, of course, tends to smooth the passage of proposals through the Faculty system.

As with any regulatory system, however, there is always the problem of where to define the border between what does and what does not, need a Faculty. The Chancellor has published a list of items that do not require a Faculty (see *pp A-6 to A-10*). Although one might argue that not much work can be carried out for £5,000, an immense amount of damage can be done for £100 or even for nothing! The Pastoral Department in the Diocesan Office is committed to processing proposals from parishes as quickly and as painlessly as possible, and will give advice and assistance where necessary.

In theory, under the same legislation that applies to any work to the church or its surrounding land, no tombstone can be erected without permission from the Chancellor. However, the Chancellor has decided that the Incumbent can give permission for certain types of memorials without further reference to him (similar to the ‘de minimis’ list mentioned before). The rules governing what the Incumbent may approve are laid down in the Regulations that the Chancellor publishes. These guidelines do not rule out any particular memorial, they define what falls within the Incumbent’s powers and what must be referred to the Chancellor. The arguments for and against what should be allowed in a churchyard have been well aired by the national media over the years, but some considerations must be given to purely practical matters (e.g. resistance to vandalism, ease of maintenance of churchyard etc.) Other matters concerning inscriptions and material are, because of their subjective nature, harder to prescribe.

This introduction is intended to provide an insight into the Faculty system and how it can work to the benefit of the parish and its buildings. Full details of the procedures involved are given in the following sections. It is important to reiterate that, if the Church of England lost the ecclesiastical exemption, we would be faced with the full effects of the secular listed building controls, which are designed to preserve historic buildings rather than let them adapt to

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the changing needs of a worshipping community. The planning committees of most London Boroughs might have little sympathy for liturgical considerations when being asked to approve internal alterations to a listed Victorian church. If the ecclesiastical exemption was lost the possibilities for liturgical reform would be severely limited.

The Faculty procedures, on the other hand, ensure that full consideration is given to all the factors (liturgical, pastoral, conservation, financial) that affect the proposals made by the parish. Secular planning procedures tend to be inflexible, and missing or incorrect documentation can cause long delays. The Faculty procedure is much more flexible and often any shortcomings in documentation can be cleared up quickly by a quick phone call from the Diocesan Office.

Our task is to safeguard the Church's inheritance of buildings and land, which have been handed down by past generations of Christians and is a part of the life of the whole community. As laid down in the first section of the Care of Churches Measure, we must have regard to the role of the church as a local centre of worship and mission. It is our responsibility to use and maintain these precious resources for the extension of God's Kingdom now and in future generations.

Diocesan Advisory Committee

Introduction

The Diocesan Advisory Committee (DAC) is a statutory body set up under the Care of Churches and Ecclesiastical Jurisdiction Measure 1991. Its main role is to advise the Chancellor on proposals for work that parishes wish to carry out in their church or churchyard. The DAC also provides advice and assistance to parishes. Members of the DAC give their time and skills freely. The DAC is administered through the Pastoral Department at Trinity House.

Membership

Chair

Archdeacons

Two representatives from Diocesan Synod

One representative appointed after consultation with English Heritage

One representative appointed after consultation with the National Amenity Societies

One representative appointed after consultation with local planning authorities

Specialist advisers/consultants, including:

Architect

Archaeologist

Lighting adviser

Sound adviser

Heating adviser

Bells adviser

Horticultural adviser

Clocks adviser

Structural engineer

Artist

Organs adviser

Liturgical adviser

Meetings

The DAC normally meets on the second Tuesday of the month (except August). Details of DAC procedures are given in the following section (Faculty Procedure).

Advice to parishes

Although the DAC's primary role is to give advice to the Chancellor, the Committee also gives advice to parishes, architects and all those engaged in the care of church buildings. The committee encourages parishes to invite the DAC to consider their preliminary plans at an early stage in the design process. Any parish wishing to take advantage of this service should contact the Pastoral Department at the Diocesan Office.

Parishes should note that in giving its advice to the Chancellor, the Committee is merely supporting the advice of the parish's independent adviser. Neither the Committee nor any of its individual members are in any way guaranteeing the work and there is no question of its members incurring liability should the work prove unsatisfactory.

Faculty Procedure

Before any works are done, or alterations made, to a church or its furnishings, or in a churchyard, or before anything is introduced or removed from a church the law requires that it is authorised by a Faculty. The legislation allows for some faculties to be granted by Archdeacons.

Items not requiring a faculty

There are certain minor items of works that the Chancellor of the Diocese has agreed can be carried out without any formal authority. A list of these matters (also known as the 'De Minimis List') was drawn up by the Chancellor in 2004 and is reproduced here:

Care of Churches and Ecclesiastical Jurisdiction Measure 1991

Chancellor's guidance to all parochial church councils, ministers and churchwardens in the Diocese as to matters not requiring a faculty

General Introduction

1. The following list has been prepared after consultation with the Diocesan Advisory Committee and comprises those matters which for the time being may be undertaken without any faculty. If the list is altered at any future date the Chancellor will give fresh written guidance.
2. The list is intended to assist parochial church councils, ministers and churchwardens so that they are aware of when they can introduce or replace items or carry out work without a faculty. It is expected that they will in all cases, where approval of the Archdeacon is required, obtain such approval before entering into a contract for work to be carried out. Failure to do so may result in the need for a Confirmatory Faculty for which a fee can be charged.
3. If you are in doubt about any matter you should consult your Archdeacon or the Diocesan Registrar.

The following items, listed under A to G, may be carried out without a Faculty:-

A Minor Repairs

1. Works of minor repair identified as such in the quinquennial inspection report provided that the specification has first been agreed by the Diocesan Advisory Committee.

2. Works of routine maintenance on the fabric of the church (not materially altering its appearance) up to the value of £5,000 excluding VAT and the cost of scaffolding, providing that the Archdeacon has been notified and has given approval in writing for work costing between £1,000 and £5,000 before the contract to carry out the work is entered into. This work includes, for example, replacement like for like of broken roof tiles or slates or window glass; cleaning gutters or downpipes; and treating isolated beetle or fungal activity (except in areas where bats may be affected). It does not include repairs to broken or cracked quarries in historic stained glass, historic clear glazed windows or historic tiled floors.
3. Works of routine maintenance to heating systems, gas, water or other services, electrical fittings or other electrical equipment (by approved NICEIC electricians or CORGI registered fitters) and furniture up to the value of £5,000 excluding VAT, providing that the Archdeacon has been notified and has given approval in writing for work costing between £1,000 and £5,000 before the contract to carry out the work is entered into. No addition to an electrical system is to be made without a faculty because of the risk of jeopardising the church's insurance policy.
4. External or internal redecoration using the same colours and materials, providing those original colours and materials had been approved by faculty when first used.
5. Treatment of fixtures and furniture against beetle or fungal activity (unless bats may be affected).
6. Repair of flagpoles.
7. Work to lightning conductors by approved NICEIC or ECA contractors.
8. Repair of wire mesh window guards using non-ferrous materials.

B. Furniture and Fixtures

No item may be disposed of unless the Archdeacon has been consulted and raises no objection.

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1. Introduction, removal or disposal of:
 - (a) furniture in church halls, but not items from the church kept in the hall
 - (b) furniture, furnishings, office equipment and minor fixtures (excluding wall safes) in vestries, but not so as to change the existing use of the room as a vestry
 - (c) fire extinguishers (subject to Archdeacon's instructions as to location and method of fixing)
 - (d) hymn boards (subject to Archdeacon's instructions)
 - (e) internal notice boards (subject to Archdeacon's instructions)
 - (f) small movable bookcases or display stands.
2. Replacement of carpets or curtains with the equivalent of similar colour, material, pattern and type of backing. (The carpeting of additional areas is not included.)
3. Additions in an existing style to name boards (excluding war memorials).
4. The use of a security system recommended by insurers for marking movable items kept in the church.

C. **Musical Instruments**

1. Introduction, storage or removal of musical instruments and stands used by music groups.
2. Routine tuning and adjustment, by a qualified person, up to a value of £1,500 excluding VAT, of organs, harmoniums and pianos.
3. Maintenance and repairs to pianos using matching materials.

D. **Bells/Clocks**

1. Inspection and routine maintenance of bells, bell frames, clocks and clock faces.
2. Replacement of damaged wooden bell stays and bell ropes.

E. **Movables**

No item may be disposed of unless the Archdeacon has been consulted and raises no objection.

Introduction, removal, replacement or disposal of:-

1. kneelers, hassocks and cushions (but not a substantial replacement of them)

2. surplices, albs, cassocks, choir robes and vergers' robes
3. cruets
4. vase
5. service books authorised by Canon
6. bibles, hymn books, song books and sheet or bound music (but not disposal of handbound or other valuable books)
7. altar linen (but not frontals or falls)
8. decorative flags and banners used for temporary display
9. the Union flag, St George's flag or the Diocesan flag.

F. Emergency items of work which may be authorised by the Archdeacon

1. Installation of security locks on doors and/or windows when the Archdeacon is satisfied that they are urgently required and the type of lock has been approved by him/her in writing.
2. Installation of security lighting or camera(s) on a temporary basis where there is urgent need to protect the building against burglary or vandalism pending the grant of a faculty for a permanent scheme provided the temporary arrangement is approved in writing by the Archdeacon and the Diocesan Registrar is notified by the Archdeacon that he/she has given approval.

G. Churchyards

1. Purchase and maintenance of lawnmowers and other churchyard equipment.
2. Routine repair of paths including resurfacing in the same material and colour.
3. Repairs to and repainting in the same colour of a notice board.
4. Minor repairs to fences and gates (but not walls).

Dispensation in Other Cases

Where the proposal is of a similarly minor nature, but does not appear in the above list, the Chancellor may be willing to dispense with a faculty, sometimes subject to conditions such as consultation with the Diocesan Advisory Committee. The Chancellor's decision will normally be based upon a letter, to be sent to the Registrar, giving all relevant information about the proposal.

General Notes

1. A faculty is not required for the deposit of parochial registers or other parochial records in the Diocesan record office, nor for the obtaining of new registers.
2. Repairs, acquisitions and the disposal of articles in the list should be recorded in the church log book.
3. In the case of works involving expenditure of more than approximately £1,500 it will normally be appropriate to consult the church's inspecting architect and this is advisable in all but extremely minor cases.

Procedures

Summary

The procedure for obtaining a Faculty (described in detail in the following sections) is summarised below:

1. consultation - with congregation, inspecting architect, Archdeacon, professional advisers, English Heritage, local authority, amenity societies, etc.
2. obtain PCC resolution
3. procedure documentation - full details (specifications, drawings, photographs, etc.)
4. send documentation to DAC for consideration
5. obtain DAC certificate, Faculty petition form and Public Notice from Pastoral Department
6. complete petition form and send to Registry
7. display Public Notice on church notice board for 28 days
8. at end of display period, send completed Public Notice to Registry
9. Chancellor considers proposals and grants Faculty
10. carry out work
11. return certificate of completion when work is finished.

Consultation

Before making a formal application for a Faculty, the parish should consult widely when considering any work. Those consulted should include the congregation, the PCC, the church's inspecting architect, the Archdeacon and, if necessary (see below) the local planning authority, English Heritage and interested amenity

societies. The parish is also advised to involve the DAC at an early stage. This is particularly important for larger projects. The DAC strongly urges parishes to use the inspecting architect for work resulting from a quinquennial inspection or for any new work.

If the church is a listed building, the PCC should refer to the booklet 'Making Changes to a Listed Church' issued by the Rule Committee (part of General Synod) in 1999. The booklet may be downloaded at www.cofe.anglican.org/about/churchlawlegis/faq/mctlc.doc

PCC Resolution

The applicants should obtain a PCC resolution authorising the work. Although this is not essential at this stage, a PCC resolution is required before the Faculty is submitted to the Chancellor and the DAC prefers to know that the proposals before the Committee have the support of the PCC.

Documentation

Full documentation for the proposed works will be required by the DAC and by the Chancellor when the petition for Faculty is submitted. The following details should be supplied:

1. FULL details of the proposed work, together with plans, designs and specifications (an extract from the quinquennial report cannot be used as a description of the work to be carried out)
2. statement of needs for work
3. an estimate of the cost of the work
4. the comments of the inspecting architect (and English Heritage / amenity societies if applicable)
5. the name of the architect to be employed (if it is not the inspecting architect)
6. the name of the proposed contractor
7. photographs of the church and the articles to be introduced or removed for the church
8. copy of planning permission (if applicable)
9. statement of significance of the church (for major alterations to a listed building) (guidelines available from DAC Secretary)
10. any other information that would assist the Committee in the consideration of the proposed work.

Consideration by the DAC

The first step in the formal procedure is to submit the proposals to the DAC for consideration. The Committee normally meets on the second Tuesday of each month, except in August. Full details of the proposed works should be sent to the DAC Secretary at the Diocesan Office at the earliest opportunity and at least two weeks before the meeting at which the proposals are to be considered.

Once the details have been received, they will be passed to a specialist member of the DAC for consideration before the meeting. He/she will report on the proposals at the meeting.

Certain small matters may be handled by a sub-committee of the DAC and do not have to wait for a full meeting of the Committee. The procedures that applicants should follow are the same whether the matter is to be handled by a sub-committee or the full Committee.

After the proposals have been considered by the Committee (or sub-committee), the outcome will be communicated to the applicants as quickly as possible. In many cases, the DAC will be able to reach a decision at the first meeting. However, on some occasions the Committee will decide that further information is required or that the parish should be asked to reconsider its proposals. Sometimes, the DAC will decide that a visit by some members of the Committee is required. It is important, therefore, that applicants do not assume that their proposals will be recommended by the DAC at the first meeting.

DAC Certificate

If the DAC is happy with the proposals the applicant will receive the Committee's certificate relating to the proposals, on which will be listed the plans and specifications recommended by the DAC. This will indicate whether the Committee has decided to recommend the proposals, or to raise no objection to them, or not to recommend them. It will also indicate the DAC's views on the effect of the works on the building, any archeological concerns and recommendations for further consultation.

The Petition

This is the formal application for a Faculty. The blank petition form together with the Public Notice (see below) will be forwarded by the

DAC Secretary to the applicant with the DAC certificate. The petitioners are normally the Incumbent and the Churchwardens of the parish and usually the PCC. (If the petition is for authority to execute a Licence for the use of either the church or church land by a third party or if there is no Incumbent, advice should be sought from the Diocesan Registrar before completing the petition as to who should be the petitioners.)

It is important that the Petition form is completed accurately. In particular the schedule of works and purposes for which a Faculty is required. Please do not rely solely on such phrases as “See specification herewith” or “See plans herewith”. The schedule must set out the works and purposes that are to be authorised by the Faculty.

The summary of works in the DAC certificate will often help in completing the schedule, and the Registrar is always ready to give advice. It is important, of course, that the works or purposes set out in the schedule are the same works or purposes that are referred to in the DAC certificate. It would normally be sensible to ensure that the wording on the Petition is the same as that on the DAC certificate.

If an application is for authority to replace an item, then it may be necessary to include a request for the disposal of the item replaced (e.g. organ, pews, etc.).

When the petition form has been completed, it should be sent to the Diocesan Registry. The following documents should accompany the petition:

- (i) the DAC certificate
- (ii) a copy of the PCC resolution signed by the Chair or the PCC Secretary
- (iii) a copy of the Public Notice (this should be a copy of the Public Notice which is being published - see below)
- (iv) the designs, plans, specifications and/or estimates giving full particulars of the proposed works and a copy of planning permission (if required), statements of need and significance (if applicable). These should be the same documents as were submitted to the DAC, and should bear that Committee’s

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stamp. These documents will normally be retained by the Registry

- (v) correspondence with English Heritage, local authority and amenity societies (if applicable)
- (vi) in the case of works which are likely to affect the organ, the electrical installation, or the security of the building against fire, vandalism, theft or other risks, a letter from the Insurance Office concerned stating that the insurance cover of the church will not be affected
- (vii) if the building has previously been the subject of a grant from English Heritage, or if grant aid is being sought from English Heritage, copies of the correspondence with English Heritage should be enclosed.

The Public Notice

This is the notice to the public of the petition for a Faculty. The Form of Notice is supplied with the Petition by the DAC Secretary, together with directions for its display. It should be completed and signed by the petitioners and published at the church.

The schedule of works or purposes should refer to all the works or purposes set out in the schedule to the petition. If the schedule refers to plans or specifications, then the Public Notice should include an address where these documents can be viewed during the Public Notice period. Once again the summary of the works in the DAC certificate is likely to be a help, and petitioners should follow the wording wherever possible. The Registrar is also available to advise petitioners on the wording of the certificate, and it is suggested that his office should always be consulted.

The Public Notice should be completed and published. This Notice must stay on display for a continuous period of not less than 28 days. It is suggested that an announcement of the posting of the Public Notice should be included during the main Sunday service.

After the Public Notice has been displayed for 28 days, the Notice or copy should be sent to the Registrar with the certificate of execution duly completed.

A Faculty cannot be issued until this has been done.

Consideration by Chancellor

The Registrar will pass the papers to the Chancellor for a determination. The Chancellor has to check with the DAC that it does not wish to alter its certificate. In certain special cases (see below), the Chancellor will seek the opinions of other interested bodies.

Grant of Faculty

If the Chancellor is satisfied that the matter may proceed, and if no formal objections are received by the Registrar, the Faculty will be issued after the certificate of execution has been received at the Registry and the period for entering objections has elapsed.

Special Cases

1. In cases of emergency, permission may be given for the work to go ahead before a Faculty is granted. In these cases, parishes should speak directly to the relevant Archdeacon at the earliest opportunity or, if the Archdeacon is not available, the Diocesan Registrar should be contacted.
2. For some special cases, the Chancellor is obliged, by the Measure, to consult some other interested parties in addition to the DAC.

If, in the judgement of the Registrar, the works:

- (a) involve alteration to, or extension of, a church that is a listed building, to such an extent as is likely to affect its character as a building of special architectural or historic interest
- (b) affect the archeological importance of the church, or archeological remains existing within the church or its curtilage

then the Chancellor is obliged to ensure that English Heritage, the local planning authority and any national amenity society (see below) that he considers to have an interest, is made aware of the proposed works.

Unless there is correspondence in these cases showing that these bodies have been previously notified of the proposed works, the Chancellor may instruct the Registrar to serve special Public Notices on these bodies.

As this may lead to a delay in the granting of a Faculty, it is in the petitioners' interests to ensure that these parties have been contacted in the consultation stage and have been made fully aware of the proposals. The DAC Secretary will normally advise parishes if these bodies should be contacted and the Registrar is always ready to advise petitioners whether this special provision is likely to apply.

3. Although these notes relate primarily to parishes, other bodies (e.g. private individuals and corporate bodies) are entitled to petition the Consistory Court. In such cases the Registrar should always be consulted at the commencement of such application.

Other Bodies to be consulted

1. English Heritage

As indicated above, English Heritage have a right to be consulted over works that will affect a listed building in such a way that might affect its character as a building of special architectural or historic interest, or over works that might affect the archeological importance of the church or remains within the church or its curtilage. Any parish that has accepted grant aid from English Heritage for work on a building must also inform English Heritage of any further work that is proposed for that building (whether it affects that area that was grant aided or not).

2. National Amenity Societies

These are the Ancient Monuments Society, the Council for British Archaeology, the Georgian Group, the Society for the Protection of Ancient Buildings, the Victorian Society and the Twentieth Century Society. Contact details for these bodies may be found in the 'Useful addresses' section.

3. The Local Planning Authority

Permission (as opposed to Listed Building Consent) may be required for works affecting the exterior of the church building, or for change of use of part of the church, or for works in the churchyard. In such cases, enquiries should be made of the local planning authority during the consultation process, and a copy of the planning permission, or a letter stating that planning permission is not required, should

accompany both the documentation submitted to the DAC and the petition. The local authority should also be consulted when major works affecting the listed buildings (internal and external) are being planned. External notice boards may require advertisement consent from the local authority.

4. The Commonwealth War Graves Commission

If the works or purposes affect, or are likely to affect, a grave or memorial maintained by the Commonwealth War Graves Commission, the petitioners should seek the Commission's agreement with the proposal. If such agreement cannot be obtained, the Chancellor will require a special Public Notice to be served on the Commission by the Registrar, giving it the right to enter an appearance at the Consistory Court.

5. The Churches Building Council

Where the Chancellor is of the opinion that any petition for a Faculty concerns, or involves, or might concern or involve, an article of historic or artistic interest, (e.g. the proposed sale of church plate) he is required to direct the Registrar to serve details upon the Churches Building Council.

6. English Nature

If bats use any part of the church, and it is possible that the works or purposes might harm or disturb the bats or their roosts, the advice of English Nature should be obtained before there is a petition for a Faculty. The letter of advice from English Nature must be submitted with the Faculty petition.

2. Church inspection & repair

Introduction

Under the Inspection of Churches Measure 1955, each church must be inspected by a registered architect or, since 1993, by a chartered surveyor every five years. The architect/surveyor appointed by the PCC to carry out the inspection must be approved by the DAC (see below). Any repairs arising from the quinquennial inspection report will be subject to Faculty jurisdiction.

The Council for the Care of Churches is now called the Churches Buildings Council and information for those who are responsible for the care of church buildings can now be found at their Churchcare website (www.churchcare.co.uk).

Procedures

There are certain specific procedures, applicable to the Diocese of Southwark, that are not detailed in the booklet and these are shown below:

1. Reminders

At the beginning of the year in which the quinquennial inspection is due, the PCC secretary will receive a reminder from the DAC Secretary. Please do not instruct the architect/surveyor to carry out the inspection until the reminder has been received.

2. Report

After the inspection has been completed the inspecting architect should send a report to the PCC, with a copy to the Archdeacon. A further copy, with the fee account, should be sent to the DAC Secretary at the Diocesan Office.

3. Fees

The Diocese has agreed a flat fee of £500 plus VAT per inspection which is paid by the parish. This fee covers the inspection and the supply of the three copies of the report. Travelling and other incidental expenses (such as the provision of ladders) and any charge for other items, such as the taking of photographs (other than those included in the report) and any additional copies of the report, should be agreed beforehand between the PCC and the Inspecting Architect.

3. Guidance notes

The DAC publishes occasional guidance notes on matters of interest and concern. These may be found on the Diocesan website at www.southwark.anglican.org

Additional useful material may be found at www.churchcare.co.uk), and, particularly for health and safety, on the Ecclesiastical Insurance website (www.ecclesiastical.com) under 'church insurance'.

4. Chancellor's Guidance on Churchyards and Memorials

Churchyard Memorials, Re-use of Grave Spaces, Reservation of Grave Spaces, Interment of Ashes, Graveyard Records, Exhumation, Trees in Churchyards, Insurance, Memorial Tablets in Churches

Issued by the Chancellor, after consultation with the Archdeacons in the Diocese of Southwark and the Southwark Diocesan Advisory Committee and the National Association of Memorial Masons.

This is a guide to assist (a) the bereaved; (b) funeral directors and stonemasons; and (c) Incumbents, Priests-in-Charge, churchwardens and others with responsibility for churchyards, in relation to various issues which arise from time to time. It replaces the Revised Directive by the Chancellor on Churchyards and Memorials in Churchyards & Churches, issued on 1st February 1994. It should be read in conjunction with the Churchyards Handbook (Church House Publishing 4th ed. 2001).

The ultimate responsibility for any churchyard rests with the Incumbent or Priest-in-Charge (generally referred to in this Guidance for simplicity as "the Incumbent"), subject to the overriding authority of the Diocesan Bishop.

Burial within a churchyard belonging to the Church of England is quite distinct from burial elsewhere, both in regard to the procedures prior to burial, and with regard to subsequent procedures. Furthermore a well-ordered and well-maintained churchyard plays an important role in education, including Christian evangelism.

Save where (exceptionally) the Guidance may be applied in the case of the consecrated areas of certain civic cemeteries, the Guidance is not applicable to civic cemeteries, crematoria or other forms of public remembrance of the dead situated outside churchyards.

1. Memorials

The prime movers in relation to memorials in churchyards will be the relatives of the deceased, for whom the business of choosing how, after death, the body should be dealt with (by burial or cremation), selecting a place in which to bury the body or the ashes, and in due course deciding what headstone to put up and what it should say, can be a source of anxiety and distress, exacerbating the problem of coming to terms with the death of a loved one.

Funeral directors and stonemasons (generally referred to in this Guidance as “funeral directors”) in practice play a leading role in the introduction of new memorials into churchyards, and it is their responsibility to assist both Incumbents and the bereaved to achieve the most appropriate memorial in all the circumstances - so that the whole process plays a part in coming to terms with bereavement, rather than simply posing a further bureaucratic burden.

The Headstone

Many of the churches in the Diocese do not have churchyards in which burials can take place. But there are a number where space still exists for new burials; and most of these are places full of character. Three elementary principles are that:

- a memorial should respect its surroundings
- a memorial should not impose an unreasonable burden on future generations
- the inscription should be the most appropriate in all the circumstances.

(1) Design

A memorial should be in harmony with those round it, and with the churchyard as a whole; and the appearance of the churchyard should harmonise with that of the surrounding area. This does not mean that there has to be strict uniformity: there is little virtue in being bland and dull. But a memorial should not stick out, and the design

cannot be left entirely to the individual choice of the bereaved. The churchyard will last for many years to come; and its character depends on that of all the memorials within it. There is a distinction between private grief and public remembrance. No single memorial can be allowed to spoil that general appearance, nor can the amount of private grief currently felt determine in any absolute way the form and content of what is to constitute a public memorial.

In practice, this means that the choice of stone for a memorial, and its size, thickness, shape, and general design, should only be finalised after looking carefully at the churchyard as a whole, and in particular at the part of it containing the grave under consideration. Memorials that are much darker, lighter, taller, or smaller than those nearby, or which are of a completely different stone, are unlikely to fit in harmoniously. The same applies to those which are in the form of a book, or an angel, or some other sculpture - unless there are many others of a similar character in the immediate vicinity. Memorials in the shape of teddy-bears or motorcars should be avoided.

Stones used in local buildings, or stones closely similar to them in colour and texture, are usually more appropriate; whereas black stones, and most marbles and granites, and stones with a highly polished surface, are less likely to be suitable. Memorials of synthetic stone or plastic are almost never likely to be. The choice of lettering also needs to be made in the light of what has been used nearby - in some churchyards, for example gold lettering may be appropriate, but in most it will not; and plastic lettering will always be unsuitable. Photographs or portraits of the deceased will almost always be inappropriate, as they would be totally out of character with existing churchyards.

(2) Maintenance

Churchyards have to be maintained by the parish for centuries to come. Memorials should be designed to allow for continuing maintenance to be as simple as possible. Generally, therefore, graves should not have kerbed surrounds, with or without railings or chains, as these impede the cutting of the surrounding grass.

The placing of cut flowers is a traditional way of showing affection or respect for the deceased; but dead flowers are unsightly and

disrespectful. Those placing the flowers should remove them, and should not be upset if those responsible for the churchyard remove dead flowers as and when they observe them. The placing of flowers in free-standing vases or jars (even if partially buried) is generally unattractive, and a better solution is to choose a headstone with integral provision for a small vase for flowers; this enables them to be kept in water, and thus to last for longer. Experience suggests that provision of two or more integral vases is excessive. Normally it will be unobjectionable to plant a few spring bulbs on the grave, in front of the headstone, but more elaborate planting schemes are generally to be discouraged. The placing of artificial flowers is inappropriate.

At least six months should be allowed to elapse following the most recent burial in a grave before a headstone is erected, to allow the grave to settle. The ground should be leveled before a headstone is erected, and if this is not done, those responsible for the churchyard may undertake leveling when twelve months have elapsed since the latest burial in it.

(3) Inscriptions

Often the most difficult decision is what to put on the headstone. It is important not to rush decisions: what seems suitable just after the funeral may seem less so after a little time has passed. Wording can properly be individual, to reflect the personality and career of the deceased, and in particular to express the precious and personal qualities that made the deceased a unique and loved person, and to strike a chord of remembrance and reflection (and sometimes challenge) to the passer-by and stranger. But it also ought to be respectful, not only of the deceased, but also of other memorials and the feelings of all who may read it. A well-chosen inscription can give comfort in the present and provide interest (to others) in the future.

The memorial should commemorate, accurately, the existence of the person who has died, by recording his or her full name, or at least the surname and first name by which he or she was generally known (for example, “Thomas Joseph Smith” or “Thomas Smith”). It is perfectly appropriate to include as well any term of affection or widely-used nickname, perhaps in brackets (for example, “Thomas

(Buster) Smith”). Generally terms such as “dad”, “mummy” or “nan” are best avoided, but this is not an absolute rule. The memorial should also record the date of death and, wherever possible, either the date of birth or the age at death.

A name on its own says little; and misses the opportunity to say something publicly about the person who has died. There is much to be said for trying to express the precious and powerful qualities that made a person unique and loved. The inscription may record what he or she did (“district nurse” or “local councillor” or “craftsman”) or simply some feature of the deceased’s character (“much-loved husband, father and grandfather”). Some may wish to add a scriptural text, or an extract from a poem, or some other suitable words, consistent with Christian theology and inspired by reflection on the life of the departed. Any inscription should be short and to the point; and should avoid the trite, the home-spun, or the overly sentimental. The vocative case should be avoided (for example, “he was much loved” is preferable to “you were much loved”).

Carved artwork may be included - either traditional Christian symbols (such as the Cross, though use of more than a single cross is to be avoided, since that reduces the Cross to mere decoration), or other decorative items (such as flowers), or, where appropriate, some other device reflecting the life of the person who has died - an example might be a book in the case of an author, or a palette in the case of an artist, though regalia relating to a particular football club are unlikely to be appropriate save in the case of a particularly close association. Sometimes in the case of a child a much-loved toy might be included. As a general rule, decoration should be kept simple and a minimal approach adopted.

(4) Advice

Careful study of other gravestones and epitaphs will often assist in choosing something appropriate. Incumbents will usually be willing to comment in advance on particular proposals, and to make suggestions. Early consultation is strongly recommended in order to minimise later problems.

Local funeral directors will be able to help with ideas for memorials, and give estimates as to costs. They will usually have a range of standard memorials, and will probably be able to indicate where an

example of any particular pattern can be seen locally. An individually commissioned memorial will almost certainly cost more, but may be a more fitting tribute to the deceased (and thus more satisfying to the bereaved), and will almost always be preferable aesthetically.

A current list of addresses of approved funeral directors regularly operating in this Diocese may be obtained from the Secretary of the Diocesan Advisory Committee, Trinity House, 4 Chapel Court, Borough High Street, London SE1 1HW (tel. 020 7939 9400). Alternatively, a list of other stonemasons who may be suitable for particular requirements may be obtained from Memorials by Artists, Snape Priory, Saxmundham, Suffolk, IP17 1SA (tel. 01728 688934).

(5) Timing

The process of choosing design and wording should not be rushed. Incumbents will usually not entertain any application for six months after the burial. It is essential that no headstone should be commissioned until any necessary formal approvals have been given - the fact that a memorial has already been commissioned and paid for is not a reason for granting approval.

Method of application for approval

Approval should be sought by filling the appropriate form (including dimensions, design, materials, inscriptions etc.), and giving or sending it to the Incumbent - or the funeral director may do this. The form must be signed by both the applicant and the funeral director, and accompanied by the appropriate fee.

If the proposed memorial conforms with the relevant Regulations (see below), it will normally be approved without further ado. Occasionally it may be necessary for others to be consulted: for example, where a memorial is in some way out of the ordinary. This does not necessarily mean that it will not be approved (though some applications are refused), but the approval process may take a little longer.

Once a particular design has been approved, it must not be altered without further approval. A new application form should accompany any revised proposal, though normally a second fee will not be required.

This procedure also applies where an alteration is to be made to an existing memorial (for example, to add a further inscription following a second burial).

Methods of approval

There are three ways in which a memorial may be approved:

- by the Incumbent, if the memorial complies with the Churchyard Regulations in force for the churchyard concerned
- by the Incumbent, where there are no Churchyard Regulations in force, but the memorial complies with the Diocesan Churchyard Regulations
- by the Chancellor - usually following consultation with the Diocesan Advisory Committee, and if necessary after an oral hearing.

Where approval is the responsibility of the Incumbent, the authority cannot be delegated, whether to assistant Priests, Curates, other clergy, churchwardens or Parochial Church Councils. Where there is a vacancy, or where the Incumbent is for some good reason unable to consider the matter, the Archdeacon may act on the Incumbent's behalf.

(1) Churchyard Regulations

The most satisfactory approach is for each Incumbent, who has responsibility for a churchyard with space for burials to prepare, in consultation with his or her Parochial Church Council, Churchyard Regulations for the churchyard(s) in question, indicating which types of memorial would normally be suitable. Such Regulations then need to be considered by the Archdeacon and the Diocesan Advisory Committee, prior to approval by the Chancellor - subject to any modifications that may seem desirable. They will then form the basis on which in future the Incumbent may approve any new memorial to be introduced into the churchyard concerned.

Churchyard Regulations may in some cases be more permissive than the general Diocesan Churchyard Regulations (see below), in others less so. Where, for example, a churchyard contains nothing but memorials of a very traditional character, almost all made from a particular type of sandstone, then the Churchyard Regulations are

likely to provide that approval will only be for that pattern and that stone. Where, on the other hand, a churchyard contains a mixture of different materials and designs, more latitude can be allowed in approving new ones.

Churchyard Regulations should be prepared in the same format as the Diocesan Churchyard Regulations and following the same general order, but substituting different specifications as required.

It will be necessary for funeral directors to check from time to time as to whether Regulations have been prepared for the churchyards where they carry out work. This is best done by contacting the Incumbent concerned, or the Secretary of the Diocesan Advisory Committee whose address is given above.

(2) Diocesan Churchyard Regulations

The second approach, which is the method used in the past, is for general Regulations to be issued by the Chancellor, following consultation with the DAC, indicating what categories of memorial are normally suitable throughout the Diocese. Where there are no Churchyard Regulations in force, the Diocesan Churchyard Regulations will be the basis on which an Incumbent may approve any new memorial to be introduced into a churchyard in his or her care.

The new Diocesan Churchyard Regulations, contained as an Appendix to this Guidance, include a number of variations from those included in the Revised Directive issued in February 1994. The Chancellor will welcome suggestions from any source as to ways in which the Diocesan Churchyard Regulations may be improved.

If a funeral director feels that the Diocesan Churchyard Regulations do not enable the introduction of a particular type of memorial that is often requested and which seems perfectly acceptable in the particular churchyard concerned - although possibly not elsewhere - the solution is of course to encourage the Incumbent to prepare Churchyard Regulations.

(3) Approval by faculty

The third approach will only be necessary comparatively rarely. It would apply where, for example, a proposed memorial is of an unusual character, and thus worthy of more careful consideration,

but not intrinsically undesirable - it may indeed be an exciting new design, worthy of enthusiastic support. Many of the more interesting monuments from the past would probably not accord with the Diocesan Churchyard Regulations. It might also apply where for some reason a proposal would be locally sensitive or controversial - in which case the Incumbent will submit to the Chancellor a note explaining why this is so. Occasionally the Chancellor may, having consulted the Diocesan Advisory Committee, approve by Faculty a proposed memorial which is opposed by the Incumbent or by the Parochial Church Council for the churchyard in question, but there must be no expectation that this will be a regular occurrence.

Consideration of a proposal

An Incumbent is able to approve any proposed memorial if it complies with the Churchyard Regulations (if any) that are currently in force for the particular churchyard concerned, or in other cases if it complies with the Diocesan Churchyard Regulations. He or she may also approve the alteration of any existing lawfully erected memorial to incorporate the details of a second, or further, burial or burials in the same grave.

The formal instrument of authorisation to Incumbents appears as an Annex to this Guidance. It enables the Chancellor to withdraw the authorisation at any time, in relation to a particular churchyard or part of a churchyard, or in relation to particular categories of memorials; but this will only happen rarely.

An Incumbent is not bound to approve a proposal merely because it complies with the relevant Regulations, and in any case (whether or not it so complies) is free to consult others if he or she wishes, before deciding on any particular application. An Incumbent must not approve a proposed memorial if he or she considers:

- that it does not comply with the relevant Guidelines
- that it is likely to be controversial for some reason
- that it is in any way inappropriate.

If the Incumbent, though unable himself or herself to approve the proposed memorial, nevertheless supports the proposal in principle, he or she will forward it to the Diocesan Registrar together with a letter of support - and let the applicant (and the funeral director)

know that this has happened, and why. The Registrar will then arrange for the proposal to be advertised and referred to the Diocesan Advisory Committee, and will forward it to the Chancellor for his consideration. No further fee is payable, unless an oral hearing is considered necessary by the Chancellor.

If an Incumbent is unable to support a proposal for any reason, he or she will let the applicant know as soon as possible, together with a brief and clear statement of the reason why. That will normally be in the form of a personal letter, as the applicant will understandably be upset in such a situation. The letter should also explain to the applicant that he or she is at liberty to apply for a faculty; and should provide the name and address of the Registrar, from whom the necessary application form can be obtained; a copy of the latter should be sent to the Registrar. A further fee will be necessary for a faculty application in such a case; but the fee paid with the initial application to the Incumbent will be returned in any event.

Unauthorised memorials

Where a memorial is erected without being approved either by the Incumbent or the Chancellor (or with the approval of the Incumbent in a case which falls outside the relevant Regulations), the Chancellor is able to order it to be removed - at the expense of whoever erected it (which may well mean, in practice, the funeral director or stonemason). This applies also where approval is given for a particular memorial, but a different one is erected without further approval.

Where a memorial is erected without approval or (more likely) is erected after approval has been given for a somewhat different memorial, the Incumbent should first consider whether approval would have been given - in accordance with the principles in the relevant Regulations - for the memorial that has in fact been erected, if it had been sought in advance. If it would have been, or if the memorial is only very marginally unacceptable, approval should be given to retain the stone. If it is unacceptable as it stands, but can be altered to make it acceptable, that should be done and approval given for the revised version. In either case, Incumbents should give the name of the funeral director or stonemason concerned to the Archdeacon.

Where a memorial is erected which cannot be approved by the Incumbent in the light of the principles in the relevant Regulations, and cannot be altered to make it accord with those principles, the Registrar will be notified, in order that he can start the necessary procedure either for a faculty to be sought (where the Incumbent considers that the memorial is generally acceptable, albeit non-conforming), or to bring about its removal; and again the Archdeacon should be informed by the Incumbent.

Future review

The Archdeacons will monitor the way in which these arrangements work in practice. If funeral directors, stonemasons or individuals have any comments, favourable or otherwise, they should communicate them to the relevant Archdeacon (or to the Registrar), in order that they may be taken into account when the matter next comes up for review.

2. Reuse of Graves

Save where burial rights are granted subject to a particular period of years, there should be an expectation that grave spaces will in due course be reused, and this is necessary to economise on land-use at a time when gravespace is a diminishing resource. This is an increasingly urgent problem which all those responsible for churchyards have to face. Sensitive solutions have to be devised and implemented.

Reuse of graves within a period of less than 75 years is likely to cause distress and offence to the living, as well as appearing disrespectful to the dead. But Incumbents should promote and publicise policies for the reuse of graves as soon as 75 years have elapsed after the most recent burial therein, not least so that those presently arranging a burial are informed of what is likely to happen in the future.

Rather than planning for re-use on a grave-by-grave basis, there is merit in seeking to bring larger areas into re-use as part of a coherent plan.

Removal of existing memorials (including laying them flat) requires a faculty from the Chancellor, and consultation with any surviving relatives who can be traced will always be appropriate. Memorials

remain the private property of those who initially paid for their erection, and therefore any faculty granted will contain provision for safeguarding (by some form of relocation) of the memorials. Where authorisation is sought to reuse part of a churchyard, the removal of a number of memorials can properly form the subject of a single petition for faculty.

3. Reservation of Grave Spaces

Spaces for burial are generally allocated on a first dies, first served basis to those entitled to them - that is, those living in the parish and those on the church electoral roll.

From time to time, however, applications are received from parishioners and others wishing to reserve a gravespace for future use. Experience suggests that such applications are more frequent in cases where the space remaining for future burial in a churchyard is adequate only for a few more years, but they do arise occasionally in other cases.

A grave can only be reserved in a particular place for future (as opposed to immediate) use after a petition has been made to, and granted by, the Chancellor. An Incumbent has no right to reserve gravespaces, and a promise made by him will on its own be ineffective. On the other hand the Chancellor will always wish to be informed of the views of the Incumbent concerned, and Incumbents may wish to consult others, including especially the Parochial Church Council.

A common instance is where a husband or wife (or partner) wishes to have a space reserved next to a spouse (or partner) who has already been buried, or where children wish to be buried near their parents. Sometimes a number of grave spaces may be reserved with a view to the creation of a family burial area.

The faculty will normally be subject to a condition requiring a fee to be paid to the Incumbent and/or into the churchyard maintenance fund of the church concerned. A faculty will relate to a particular individual or individuals and cannot be transferred even to another member of the family without a new faculty. Reservation of a gravespace does not carry with it any associated right to erect a memorial.

Once a faculty has been granted by the Chancellor, the Incumbent must keep a record, so that there can be no risk of the space being used for anyone else. It will also minimise the likelihood of future problems if reserved spaces are physically marked on the ground in some way.

By law, where a gravespace is reserved, a burial must take place therein within a maximum period of 100 years. In this Diocese reservation is unlikely to be granted for a period in excess of 40 years (save in the case of family graves), and account will be taken of the date by which the person to be buried is likely to have died. A reservation can be extended by further faculty.

Once a burial has taken place in a reserved gravespace, there is no bar to its being used again for an unrelated burial once a period of approximately 75 years has elapsed.

Incumbents will give advice to persons seeking to reserve a gravespace, and should discourage at the outset any applications which are almost inevitably going to be turned down.

4. Interment of Ashes

The random interment of ashes in churchyards is discouraged. It is wasteful of gravespace, and tends to lead to a proliferation of memorials. Incumbents are authorised to approve the interment of ashes in churchyards in two situations.

The first is where the ashes are those of a close relative of a person whose body already occupies a gravespace within the churchyard. Provided other relatives of the original occupant agree, there is much to be said for allowing one or more such interments of ashes, so as to create a family grave. It should assist maintenance of the grave, as well as being an economic use of gravespace. On the other hand such interments of ashes do not automatically carry any right to a further memorial, or to the adding of a further inscription to any existing memorial, for which separate approval must be sought. It will usually be unsightly, and therefore inappropriate, to permit the erection of additional memorials in such circumstances.

The second is where the ashes are to be interred within an area of the churchyard designated for the interment of ashes, which will

Section A: The Care of Churches

normally take the form of a Garden of Remembrance. Subject to selection of an appropriate area and the provision of an appropriate design, faculties for the creation and subsequent extension of Gardens of Remembrance are likely to be granted, since this is a respectful and economical way of treating the remains of the deceased. Interment of ashes should take place by simple pouring of the ashes into a hole in the ground, rather than by the burying of ashes within a container, and the Incumbent should maintain a gridplan showing where individual ashes have been buried. After a period of approximately 20 years, individual squares on the grid can be reused. It is possible to incorporate simple plant and/or gravel cover, provided care is taken not to disturb recently buried ashes. Fresh unwrapped flowers may be laid at the place of interment to mark anniversaries, but should be removed after a short period, since nothing is more depressing than the sight of dead flowers littering an otherwise well-maintained Garden of Remembrance.

Relatives of the deceased generally prefer a system whereby the names of the deceased are recorded in some semi-permanent form outside, close to the place of interment. Individual plaques, though frequently and understandably sought, are to be discouraged, since they almost always give rise to a cluttered appearance. Sometimes it is possible to incorporate into the design a memorial on which names can be recorded as interments take place, but this is not always possible, nor is it readily compatible with reuse of the Garden of Remembrance. Usually the most appropriate course will be a Book of Remembrance, kept open within the church and with the pages turned at regular intervals. A fee should be charged to cover the costs of maintaining the Garden of Remembrance itself and the cost of a calligrapher for inscribing the names in the book. Relatives can sometimes be encouraged to achieve remembrance for the deceased through means other than memorials, for example through gifts of value to the church. It is important, however, that churches are not embarrassed by gifts of unwanted items (for the introduction of which in any event a faculty is likely to be required), and that such gifts do not become a means of securing a memorial tablet which would otherwise be refused.

It will generally be appropriate for the Incumbent or Parochial Church Council to appoint one or more persons to take responsibility for the maintenance of the Garden of Remembrance, including regular replanting, weeding and removal of dead flowers.

5. Graveyard Records

Each parish is legally required to maintain a record of burials which take place in the churchyard including disposals of cremated remains, though a separate register should be kept for the latter. Both records should list the same information: the full name of the deceased; his or her age and former home address; the date and location of burial; and the name of the officiating minister. In addition the register of interments of cremated remains should record any funeral service and the place of cremation preceding the interment. Maintenance of an up to date plan of the churchyard and of the occupation of gravespaces is an important responsibility. Helpful guidance is contained in Appendix 1 to the Churchyards Handbook. The records that parishes make will themselves form important historical documents and should be of a high standard.

The primary responsibility for maintaining church records lies with the churchwardens, but they will need to work closely on this (as on all other matters) with the Incumbent.

6. Exhumation

Once a body or ashes have been buried in consecrated ground (whether in a churchyard or in a municipal cemetery), they may not be exhumed save with the authorisation of a faculty granted by the Chancellor, which will never be granted unless there are special circumstances which justify the making of an exception to the norm that Christian burial is final. Nevertheless, there has been throughout the country an increasing number of petitions for exhumation, often in far from exceptional circumstances such as where widows have moved home and can no longer readily visit the grave of their former husbands, or where parents have moved and are unable to visit the graves of a child who has predeceased them. In some cases Incumbents appear to be advising applicants that permission will readily be forthcoming; this is particularly so in the case of Incumbents to whose parishes the surviving spouse or parents

have moved and who are prepared to make available space for reinterment. It is important that Incumbents and funeral directors inform those planning burial in consecrated ground that this is a final disposal and that the vast majority of petitions for exhumation will necessarily be rejected as a matter of law.

Moving to a new area is not an adequate reason for removing remains as well, and any medical reasons relied upon by a petitioner would have to be very powerful indeed to create an exception to the norm of permanence, for example serious psychiatric or psychological problems where medical evidence demonstrates a link between that medical condition and the question of location of the grave of a deceased person to whom the petitioner had a special attachment.

There are, however, two situations in which the prospects of obtaining a faculty for exhumation are less remote. The first is where a genuine mistake has occurred, for example where a burial took place in the wrong plot in a cemetery; or where there was a lack of knowledge at the time of burial that it was taking place in consecrated ground with its significance as a Christian place of burial. The second is where exhumation takes place with a view to reinterment in an existing or proposed family grave. Such multiple use of grave space is to be encouraged, as an expression of family unity and as an economical use of land for burials. It should not, however, be assumed that whenever the possibility of a family grave is raised a petition for a faculty for exhumation will automatically be granted. A husband and wife should make provision in advance by way of acquisition of a double gravespace if they wish to be buried together; and where exhumation is contemplated there will need to be clear evidence as to the existence of the legal right to such a family grave if no family member has already been buried in it.

7. Trees in Churchyards

The Chancellor is obliged to give written guidance to Parochial Church Councils as to the planting, lopping and topping of trees in churchyards following consultation with the Diocesan Advisory Committee. This section sets out that guidance.

Introduction

The care and maintenance of a churchyard, and thus the upkeep of the trees within it, is the responsibility of the Parochial Church Council. In the case of trees, this is so even if a churchyard is a disused one, maintained by the local authority.

Where tree preservation orders have been made in respect of trees in churchyards, or where the churchyard lies within a conservation area, consent to fell, or to carry out work on, trees is required from the relevant planning authority: there is no “ecclesiastical exemption” from local authority control over works to trees (unlike the position in relation to building works to listed churches). Where the tree is in a conservation area (but not subject to a tree preservation order), the local planning authority must be notified of the proposed works to trees, in order to give it the opportunity to impose a tree preservation order.

A faculty from the Chancellor will generally be needed for any works of consequence to any existing trees in a churchyard, and for the planting of any new ones (but see below); and this will be so whether or not there is a need to obtain planning consent from, or to notify, the local authority under the Town and Country Planning Act 1990. The Faculty Rules contain a special form for petitions relating to trees, which needs to be sent to the DAC in the first instance.

All applications should be accompanied by photographs, clearly showing the nature of the alleged problem.

The importance of churchyard trees

Whilst trees may seem to be of no direct relevance to the life and work of the church as a local centre of worship and mission, they play an important role both in themselves (as objects of interest and beauty) and also as counterfoils to the architecture of the church itself and the memorials within the churchyard. Often local people appear to be more concerned about what happens to trees within a churchyard than about any other aspect of church-life. Additionally trees both grow and decay. This can cause problems for buildings and memorials, and dangers for all concerned.

Expert advice

Where there are trees in a churchyard, the Parochial Church Council should appoint one of its members as its Tree Warden, who should be responsible for monitoring the state of trees in the churchyard and should report at least annually to the Parochial Church Council. If desired, this position can be filled by one of the churchwardens. Further, every Parochial Church Council should be prepared to seek and follow expert advice concerning the trees and large shrubs within its churchyard or churchyards.

Many local authorities employ an arboricultural officer who may be able to give advice with regard to the safety of a tree within a churchyard and what, if any, maintenance or remedial work is necessary; alternatively advice can be obtained from an arboricultural consultant. The obtaining of a report from a consultant, and acting upon its recommendations, will be evidence that a Parochial Church Council has acted prudently, which is a duty expected of it by the law and indeed by insurance companies.

It is good practice to compile a tree report approximately every five years, which can then be annexed to the report of the quinquennial inspection of the church.

Dangerous trees

There is no formal exemption for the need for a faculty where a tree (or part of it) is dangerous. The Faculty Rules contain provisions for obtaining authorisation in cases of urgency, and a condition will often be imposed requiring replacement planting. Where the imminence of the danger is such that the only safe course is immediate felling, the Archdeacon should always be consulted, and care should be taken to confine the works to the part of the tree which is the cause of the danger; and thereafter to obtain retrospective authorisation.

Unauthorised works

Not only can an injunction be issued by the Consistory Court restraining the carrying out of unauthorised works to trees, but also a restoration order can be made by the court, requiring a replacement tree or trees to be planted.

De minimis

Subject to prior consultation with the Archdeacon, up to two trees in any churchyard may be planted in any calendar year without a faculty provided the trees are planted at least 10 metres from the wall of any church or building, and provided no disturbance of graves will be involved.

Minor works to trees, falling within the following categories, can be carried out without a faculty:

- (a) in the case of any tree:
 - (i) the carrying out of pruning works, as distinct from lopping or topping; and
 - (ii) the carrying out of works required by a notice under paragraph 9 of Schedule 4 of the Electricity Act 1989;
- (b) in the case of a tree that is in a conservation area but not subject to a tree preservation order:
 - (i) the cutting down, uprooting, lopping or topping of a tree whose diameter does not exceed 75 millimetres; and
 - (ii) where carried out for the sole purpose of improving the growth of other trees, the cutting down or uprooting of a tree whose diameter does not exceed 100 millimetres (as thus measured); and
- (c) in the case of a tree that is neither in a conservation area nor subject to a tree preservation order, in addition to the works identified in (b)(1) and (ii) above, the lopping or topping of any tree.

8. Insurance

In view of their extensive responsibilities if any accident should occur in a churchyard (including damage occasioned by paths and memorials which have fallen into disrepair) it is essential for the Incumbent and the Parochial Church Council to be covered by an adequate insurance policy. Useful guidance is contained in chapter 5 (and appendix 2) of the Churchyards Handbook.

Whatever the amount of insurance cover, it will be appropriate for all Parochial Church Councils at least once a year to receive a report on the present state of any churchyard for which they are responsible, and to ensure that where any monuments become

dangerous appropriate measures are instituted (with the benefit of faculties where appropriate).

The integrity of existing memorials should be tested on a regular basis, preferably using devices (such as Topple Testers) which provide a more accurate test of stability than manual testing.

9. Memorial Tablets in Churches

The relatives of a deceased person sometimes ask if they may put a memorial tablet into a church. It is sometimes the case that no one else wants the tablet, but Incumbents, churchwardens and Parochial Church Councils are naturally reluctant to say so, and sometimes support an application which they really wish had not been made.

Churches are not primarily repositories for family memorials, and tablets are often neither beautiful in themselves nor of interest to anyone other than the family of the deceased. On the other hand, if a tablet is to be erected, it should contain more than merely a statement of the name and dates of the person commemorated.

No tablet may be placed in a church without a faculty from the Consistory Court, and the ultimate decision as to whether to grant a faculty is for the Chancellor alone.

A faculty will not generally be granted unless:

- (i) the person to be commemorated has an obvious connection with the church or the parish, going beyond that of a person who has worshipped in the church or lived in the parish;
- (ii) the public display of the memorial is in some way educative or inspirational; and
- (iii) the memorial is doctrinally sound;
- (iv) it is artistically an adornment to the church.

As a safeguard against a premature application, a faculty is unlikely to be granted until at least twelve months after the death of the person to be commemorated.

Annex: Instrument Authorising Ministers to Approve the Introduction of Memorials in Churchyards

Appendix: Diocesan Churchyard Regulations

**The Feast of Pentecost
8 June 2003**

**Charles George QC
Chancellor**

ANNEX

Diocese of Southwark

Instrument Authorising Ministers to Approve the Introduction of Memorials into Churchyards

1. Subject to paragraph 5, the minister may approve the introduction into a churchyard of any memorial, provided that the memorial is in accordance with the relevant regulations.
2. “The relevant regulations” means:
 - (a) the Churchyard Regulations applying specifically to the churchyard concerned; or
 - (b) if there are no Churchyard Regulations in force, the Diocesan Churchyard Regulations set out in the Appendix; and “minister” means the Incumbent of the parish in which the churchyard is situated or, where rights of presentation are suspended, the Curate licensed to the charge of that parish or the minister acting as Priest-in-Charge.
3. The minister may adopt Churchyard Regulations relating to one or more of the churchyards in his or her care, provided that:
 - (a) they comply with the principles contained within the current edition of the document issued by the Chancellor entitled Churchyard Memorials etc. Chancellor’s Guidance; and
 - (b) they have been approved by the Parochial Church Council, the Archdeacon, the Diocesan Advisory Committee and the Chancellor; andtwo or more ministers may jointly adopt Churchyard Regulations so as to apply to two or more of the churchyards in their care, subject to the same provisos.
4. Subject to paragraph 5, following a second or subsequent burial in a plot on which there is an existing lawfully erected memorial, the minister in whom is vested the freehold of the churchyard concerned may approve the alteration of that

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memorial to incorporate the name and other details of the newly buried person.

5. The minister shall not approve the introduction or alteration of any memorial if he or she considers that it:
 - (a) does not comply with the principles set out in the relevant regulations;
 - (b) is likely to be controversial for some reason; or
 - (c) is in any way inappropriate.
6. The authorisation given by paragraphs 1 and 4 shall not be delegated by the minister to any other person, save that, during a vacancy in the living or in case of emergency, the authorisation may be exercised by the Archdeacon.
7. The authorisation given by paragraphs 1 and 4 may be withdrawn at any time by the Chancellor in relation to any minister, or all or any part of any churchyard, or any particular memorial or category of memorials, following consultation with the Archdeacons.

APPENDIX

Diocese of Southwark

Diocesan Churchyard Regulations

1. These Regulations shall apply only where there are not in existence Churchyard Regulations adopted by the minister under the terms of the Instrument of Authorisation.
2. Subject to paragraph 1, the minister may approve the introduction into a churchyard of any memorial if:
 - (a) at least six months have elapsed since the most recent of the deaths being commemorated;
 - (b) the form of the memorial is:
 - (i) a vertical headstone
 - (ii) a vertical headstone on a horizontal stone base
 - (iii) a horizontal stone slab, or
 - (iv) a simple timber cross;
 - (c) the memorial is adequately secured in the ground so as to ensure that it is stable;

- (d) in the case of a stone memorial,
 - (i) it is of natural stone (either sandstone, limestone, granite not darker than Rustenberg grey, or slate), and
 - (ii) it does not have a highly polished reflective finish;
- (e) in the case of a memorial consisting of a vertical headstone, with or without a horizontal stone base, any foundation slab is located so that its upper surface is either flush with the surrounding ground level or at least 300 mm (12 in) beneath it;
- (f) in the case of a memorial consisting of a vertical headstone on a horizontal slab,
 - (i) the base is an integral part of the design
 - (ii) where it incorporates a receptacle for a flower vase, there is provision for no more than one such vase
 - (iii) where it incorporates a receptacle for a flower vase, the base does not project more than 200 mm (8 in) beyond the face of the vertical stone; and
 - (iv) in any other case, it does not project more than 100 mm (4 in);
- (g) in the case of a memorial consisting of a horizontal slab,
 - (i) it is no more than 600 mm (2 ft) wide and 1800 mm (6 ft) long, and
 - (ii) its upper surface is flush with the surrounding ground;
- (h) the inscription on the memorial contains at least:
 - (i) the name of the deceased;
 - (ii) the date of his or her death;
 - (iii) the date of birth or the age at death,and any factual material in the inscription is accurate; and
- (i) the inscription and any artwork is incised into the stone and, if painted, no more than one colour is used; and

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- (j) the memorial contains no advertisement or trademark other than the name or mark of the mason which, if included, shall be at the base of the side or rear face of the stone and no more than 13 mm (1/2 in) high.
- 3. Any other memorial shall only be introduced into a churchyard with the authority of a faculty.
- 4. Notwithstanding compliance with paragraph 2, the minister shall not approve a proposed memorial if he or she considers that it is:
 - (i) likely to be controversial for some reason
 - (ii) is in any way inappropriate,and in considering whether to approve a proposed memorial the minister shall have regard to the current version of the document Churchyard Memorials etc. Chancellor's Guidance.
- 5. "Minister" means the Incumbent of the parish in which the churchyard is situated or, where rights of presentation are suspended, the Curate licensed to the charge of that parish or the minister acting as Priest-in-Charge.

**The Feast of Pentecost
8 June 2003**

**CHARLES GEORGE QC
CHANCELLOR**

SECTION B: PROPERTY MATTERS

Section B: Property Matters

1.00 - Definitions of Church Property

1.01 Introduction

There is much confusion over who owns 'church' property and if property transactions are to run smoothly then it is very important that those dealing with property matters have an understanding of the complexities. It is essential that any professional consultant advising on these matters understands them completely, otherwise a great deal of time and money is likely to be wasted and considerable frustration, misunderstanding and delay is likely to ensue.

Comments on the different ownerships of land and buildings and the positions of boundaries are set out below.

1.02 Church Land

This is the land upon which the church stands and includes in many cases (but not necessarily all), the surrounding churchyard. The freehold interest of the property is vested in the Incumbent, for the time being of his incumbency, but the disposal of any legal interest is controlled by the Pastoral Measure 1983. Decisions in relation to church property all need to be routed through either the Pastoral Committee and/or the Diocesan Advisory Committee and will most likely be subject to Faculty Jurisdiction. In some cases proposals embracing the church or church land will have to be the subject of 'schemes' under the Pastoral Measure. This can be a lengthy procedure and those seeking further information are referred to the section which deals with the Pastoral Department.

1.03 Parsonage Land

This is the land upon which the Parsonage stands and includes its garden and usually (but not in all cases) other areas of curtilage. It can sometimes also include flats attached to the parsonage. The freehold interest of this property is vested in the Incumbent, for the time being of his incumbency, but the disposal of any legal interest is principally controlled by the Parsonage Measures 1938 & 1947.

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Decisions in relation to parsonage property all need to be routed through the Parsonage and Property Maintenance Committee. Before any proposal for part or all of any parsonage property the Diocese has to be able to certify that all the relevant parties agree with the proposals or alternatively refer any representations received to the Church Commissioners for adjudication. The relevant parties are: the Bishop, the Patron, the PCC and the appropriate Diocesan Committees. Of these parties neither the Patron nor the PCC have any veto over the proposal although the Incumbent can veto any proposal.

1.04 Glebe Land

This is land which has been vested in the Southwark Diocesan Board of Finance by virtue of the Endowment and Glebe Measure 1976. (Formerly it was land which was vested in the Incumbent of a Benefice who received the rents as part of his stipend.) It is quite common for there to be some Glebe land adjoining church and parsonage sites and where this occurs it needs to be remembered that the freehold interest of such land vests in the Diocesan Board of Finance as a distinct party that will have different interests and concerns from the adjoining owners, even if there is a common purpose and intent. Sometimes flats formed out of large parsonages can be Glebe property.

The Board has effective control of Glebe property to use it, as it sees fit, to generate income for clergy stipends. Significant management decisions are taken by the Executive & Glebe Committee and day to day management is carried out by agents taking their instructions from the Property Department. Before any transaction can be completed, notice of intent is served on the Incumbent and parish within the land is situated. Any representations received are referred to the Church Commissioners for their formal adjudication before the matter can proceed. Any parsonage land which is not needed by an Incumbent for his beneficial use can, upon being certified as such, be vested and subsequently managed as Glebe property. However before

such a change of vesting can take place the Incumbent's views will be taken into account.

1.05 Board Properties

This is property which is vested in the Southwark Diocesan Board of Finance as its corporate property. The Board has delegated its management to the Executive and Glebe Committee and all significant matters relating to Board Properties go before this Committee. Transactions appertaining to Board Properties are not referred to the Church Commissioners since they are subject to Charity Law and in particular The Charities Acts 1993 and 2006.

1.06 Parish Property

This is property which a parish possesses and usually takes the form of church halls and Curate's houses but may include other land or buildings. All parish property, both financial investments and real estate, is vested in the Diocesan Board of Finance in its capacity as Custodian Trustee, but the parish has the use, together with the responsibility of managing, of such property in its capacity as Managing Trustees. All the Trustees, both Custodian Trustees and the individual members of the PCC as Managing Trustees are severally and individually responsible under Charity Law for the proper management of all their assets.

Any proposals for the sale, change of use, leasing or development of property owned by parishes, other than the sale of a Curate's house, will go before the Sites Committee which will advise the Diocesan Board of Finance in the exercise of their duties as Custodian Trustees. It will quite frequently be the case that parish property will abut church property as well as Parsonage/Glebe/Board Property and when this is the case it needs to be remembered that each party's duties need to be individually satisfied if any joint development proposal is considered. Although resolving all these issues can appear formidable, and sometimes are, it is reassuring to know that different requirements and complexities can almost always be resolved to the satisfaction of all parties.

1.07 Boundaries between land in different ownerships

It is often helpful to be aware that over the years the position of fences between the differently owned church properties can get repositioned for the convenience of one party or another. It is therefore very important to investigate boundaries and all title details before instructing professional advisors when any building work is proposed on parish/ parsonage/ Glebe/Board land. Moreover it is not that unusual that in the past one party has built on land owned by another party and such matters need to be resolved at an early date. It may also be helpful for any parish contemplating a building scheme to know that it is possible to rearrange boundaries between parties, to enable the full potential of a scheme to be realised, providing that each party's duties are properly met.

2.00 - Diocesan Property Committees

2.01 The Executive & Glebe Committee

This Diocesan Committee reports to the Diocesan Board of Finance and is responsible for administering the capital assets of the Board, the assets vested in the Board by the Endowments and Glebe Measure and other assets which may be vested elsewhere but in which the Diocese has a financial interest. It is responsible for financial investments and real estate.

The Committee is formed from members of the Diocesan Board of Finance together with some co-opted members; it includes all the Archdeacons (although all do not have voting rights) and is responsible for implementing all the relevant Ecclesiastical Measures. It is served as appropriate by its Surveyors, its Lawyers, the Diocesan Secretary and the Diocesan Surveyor. The Committee meets four times each year.

2.02 The Parsonage and Property Maintenance Committee

This Committee reports to the Southwark Diocesan Board of Finance and is responsible for the repair and maintenance of

all property owned or maintained by the Diocese. It considers requests from occupiers of Diocesan Properties for improvements and determines the scope of continuing repairs. Each year the Committee forms its repair budget for submission to the Stipends & Budget Committee, for the following year's expenditure. It also controls current expenditure. Within the budget it prepares are the costs of building insurance, council tax, water rates etc. The Committee implements the Parsonage Replacement Programme endorsed by Diocesan Synod.

The Committee is formed from members of the Diocesan Board of Finance together with some co-opted members and is responsible for implementing the Repair of Benefice Buildings Measure 1972. It is serviced by the Diocesan Surveyor and meets six times a year.

2.03 The Southwark Diocesan Sites Advisory Committee and the Redundant Churches Uses Committee

This Committee is an amalgam of two separate committees but the business of each Committee is dealt with separately so as to comply scrupulously with the requirements of the Pastoral Measure 1983. The Sites Committee element is an advisory committee considering use/development cases and the other element is the Diocesan Redundant Churches Uses Committee, a statutory committee established by the Pastoral Measure to consider uses for churches which are declared redundant.

The Sites Committee is the body which advises the Executive & Glebe Committee, the Redundant Churches Uses Committee, the Pastoral Committee and the Diocesan Board of Finance. Development cases coming before it are likely to include property owned by more than one party such as Parishes, Diocese and Benefice. Should a parish own land or buildings which it wishes to develop, lease or sell for development then that proposal will be placed before the Sites Committee. The membership of the Committee comprises all the Archdeacons and a number of property professionals (nominated by the Committees which receive

its advice). It is served by the Diocesan Secretary and the Diocesan Surveyor. It meets six times a year.

3.00 - Property Management

3.01 Diocesan Responsibilities

The Property Department reports to the Diocesan Board of Finance through the Parsonage & Property Maintenance Committee and the Executive & Glebe Committee. Its responsibilities include:

- Maintaining and improving all parsonages within the Diocese and all other properties owned by the Diocesan Board of Finance (either as its corporate property or as Glebe). This includes arranging repairs to properties in response to defects reported by occupiers.
- Dealing with all insurance matters appertaining to the properties within its charge, including all claims where appropriate. (This excludes all matters relating to the contents of buildings which are the sole responsibility of occupiers).
- Dealing with the payment of Council Tax and Water Rates.
- Arranging for properties to be let or occupied under licence when they would otherwise be temporarily vacant.
- Dealing with the negotiations and the sale or purchase of any legal interest in any parsonage or Diocesan property of any nature whatsoever. (This includes easements, wayleaves, rights of access, rights of light, etc.)
- Dealing with property transactions on behalf of Parishes where property is vested in the Diocesan Board of Finance in its capacity as Custodian Trustee.
- Assisting parishes with redevelopment schemes.
- Advancing the Parsonage Replacement Programme.
- Servicing the Sites Committee and Redundant Churches Committee.

For details of all these committees see section 2.00.

3.02 Occupiers Responsibilities

Occupiers have a duty to take proper care of the houses in which they reside. This duty is equivalent to that of a tenant to use the premises in a tenant-like manner and to promptly report to the Property Department all defects arising at the earliest opportunity.

3.03 Repair Works

Repair works are carried out as falling into one of the following categories:

- **Vacancy Works**

These are arranged as soon as possible after a property has been vacated. The scope of the works will be determined at a meeting held at the house between the relevant Archdeacon and a surveyor. (A parish representative is also invited to be present).

- **Exterior Redecorations/Quinquennial Inspections**

This work and any necessary inspections will be initiated by the Property Department.

- **Ad hoc Repairs**

Any repairs reported to or known to be needed by the Property Department will be put in hand by means of direct instructions to appropriate contractors.

- **Emergency Repairs**

All emergency repairs that are needed should be reported to the Property Department at the earliest opportunity during normal office hours. Upon such notification instructions will be telephoned to appropriate contractors. In the event that matters, which cannot wait, arise out of normal office hours occupiers are advised to contact contractors whose emergency telephone numbers are set out under paragraph 3.05. These contractors will carry out the necessary work and forward the account to the Property Department for direct settlement. In the unlikely event that any of these firms are unable to assist, firms recommended by friends

or neighbours are preferable to using companies who are unknown, whose quality of work may be unacceptable and whose charges may be quite unreasonable.

Warning

Occupiers should note that calling out any emergency contractor whose name is found by means of directories is no guarantee that workmanship or charges will be satisfactory. Occupiers should note that Diocesan staff only have authority to reimburse reasonable charges for reasonable workmanship and any excess (and it might be substantial) will have to be born by the party instructing the contractor.

3.04 The organisation of repairs and building works

When contractors are instructed to carry out work occupiers will normally receive a copy of the Contract Instruction which goes to the contractor. The contractor will be asked to contact the occupier with a view to arranging access for carrying out the work at a time convenient to both parties. It is very helpful if occupiers also try to make contact with the contractor. Once access and a programme for carrying out the work has been agreed between occupier and contractor the contractor will carry out the works in accordance with his instructions from the Property Department. (So as to control both Diocesan Budgets and the scope/specification of the works, all contractors are instructed that they will only be paid for work which is the subject of a specific instruction from the Property Department. The accounts for work undertaken by contractors upon instructions from occupiers are sent to the occupiers for direct settlement.) Should any occupier have any specific concern about the quality of any workmanship or materials they should contact directly the Clerk of Works within the Property Department.

3.05 Emergency contractors

Any of the following contractors should be contacted out of normal hours for emergency work. Please do not contact them out of normal hours unless the matter is really urgent.

3.05.1 General Building matters:

- Plus Four Services - 01795 597579
- Overall Construction 07739287533

3.05.2 Plumbing & Heating problems:

If you smell gas you should immediately turn off the gas at the main cock by the meter. If the smell of gas remains, you should telephone Transco whose telephone number should be next to the meter. Failing that you can find it in the telephone directory under 'Gas'. If the smell of gas disappears, you should contact Carshalton Boiler Services who will visit to rectify the problem. They are CORGI Registered and qualified to deal with gas installations. They have authority to carry out the necessary work and send the account to the Property Department for direct settlement.

- All Plumbing and Heating
During normal working hours 0845 241 9250
Out of normal working hours 0 7 7 3 9
287533
- M.A. Butler
07966 290495

3.05.3 Electrical problems:

- MB Electrical Installation
07762 882382 (contact Murat)

3.05.4 Drainage problems:

- Drain Surgeon: 020 8680 1306

3.05.5 Glazing problems/24 Hour Boarding Up Service:

- Burwood Glass: 01293 822900
- All Emergency Services Co
During normal working hours 020 8664 3760
Out of normal working hours 020 8643 1708
020 8664 3760 (day) 020 8643 1708 (night)

3.05.6 Structural damage and fire damage:

Any such damage or severe difficulties which arise out of

office hours should be referred in the first instance to the relevant Archdeacon who will refer the matter to the Diocesan Surveyor.

N.B. It should be borne in mind that as this Guide ages it is likely that some contractors may have ceased trading and others may no longer be employed by the Diocese. In such circumstances it may be necessary to call out another contractor but attention is drawn to the need for circumspection as outlined in the warning in paragraph 3.03.

3.06 Supervision and approval of work undertaken by contractors

Work generated through a formal Contract Instruction is likely to be the subject of a visit by the Clerk of Works who may call in at any time to inspect either work in progress or completed work. Nevertheless, despite this likely visit occupiers are asked to draw to the attention of the Clerk of Works any concerns that they may have over the quality of workmanship or materials. Confirmation by an occupier that a job has been well done is always helpful in monitoring contractors' work.

3.07 Empty Parsonages and Diocesan Properties

If you are aware that within your parish a parsonage or Diocesan property is shortly to fall vacant for whatever reason, please contact the Property Department who will advise on the best way of securing the property until the next appointment is made. Before resolving the matter the view of the relevant Archdeacon will be sought. In some cases security may be best achieved by caretakers occupying the property under licence and in some cases there may be opportunities for letting. This provides added income to the Diocese or the Diocesan Stipends Fund, depending upon which property is involved.

It is most important that **nobody** occupies any property after it has been vacated unless they have first signed the appropriate Licence, Tenancy Agreement or Lease. Failure to observe this point could mean that when the property is next

needed to house a Priest, Curate or Deacon it may not be available. The importance of contacting the Property Department on this issue cannot be over emphasized.

If asked the Property Department will be pleased to give informal advice to parishes in connection with letting of parish owned Curates houses.

3.08 Sub-Letting

Do not **under any circumstances** sub-let any part of the Parsonage house before contacting your Archdeacon; it may result in serious legal problems. Your Archdeacon, the diocesan solicitors and the Property Department are available to advise you on all property and legal matters. This issue is particularly important following the 'Houses in Multiple Occupation Housing Act 2004', which requires a Landlord Licence for certain houses in multiple occupation.

3.09 Rental Income and Council Tax

You are entitled to retain income from lodgers. However, if you are single, residing in Diocesan/ Parsonage property, and do not have dependent relatives or lodgers staying in your home, the Diocese will be able to claim a single occupancy Council Tax discount. Please notify the Property Department if your status changes from single to multiple occupancy , as Council Tax will be payable in full. For further advice please contact the Property Department.

3.10 Replacement Policy

The policy of replacing overlarge and unsuitable houses is one which has been recently endorsed by Diocesan Synod and which is administered by the Parsonage & Property Maintenance Committee. It has been introduced because of the unacceptable and unsustainable cost of maintaining and occupying overlarge and unsuitable parsonages.

If you occupy one of the one hundred or so very large Parsonage properties your assistance and that of the parish is sought in attempting to resolve what is a very difficult problem. Each case is different and the Diocesan Surveyor would welcome the opportunity of discussing and explaining

the issues surrounding the overlarge and unsuitable benefice house which you may occupy. Very often it is possible for a solution to the overlarge parsonage problem to be coupled with a solution to a parish property problem, thereby providing mutual gain. What is not possible is for the Diocese to move a replacement scheme forward without the agreement of the Incumbent who has a veto.

At the time of writing, it is considered likely that a *Road Show*, in the form of a PowerPoint presentation, will shortly become available to illustrate the mutual benefits that can be gained through the Replacement Programme for occupiers, parishes and Diocese. The relevant Archdeacon and the Diocesan Surveyor will be pleased to make the presentation available within any parish.

3.11 New Parsonage Design

Architects schemes for the design of new parsonages are approved at informal meetings of a New Parsonage Sub-Committee at present comprising:

Mr Andrew Simon (Chair)
Revd Jeremy Garton
Mrs Alison Morgan

3.12 Planning Policy

A Policy adopted by Diocesan Synod sets out the position of the Diocese in controversial planning matters. (Any parish embarking on any development scheme is advised to contact the Diocesan Surveyor for details at the outset of their scheme.)

3.13 General Matters

All properties deteriorate if neglected and all minor problems rapidly increase in scale if not dealt with at the earliest opportunity. The assistance of occupiers is therefore sought in bringing to the notice of the Property Department any defect which arises, however minor, if a simple remedy cannot immediately be applied e.g. a loose or missing screw or oiling squeaking hinges. However, please remember that 'bodging' a job or a poor do-it-yourself job is no answer to a

problem; it costs more money to undo the work and to rectify the subsequent problems than dealing with the matter properly in the first place.

Many incipient problems can be identified by a twice annual external walk around the house during a heavy rainstorm. Leaking and overflowing gutters can immediately be identified and five minutes of discomfort is often better than several weeks of disruption in a house, as could be the case if extensive dry rot eradication works are needed but which would never have arisen if good stewardship had been exercised in the first place.

Occupiers are asked to agree with a surveyor any changes to a property which they may wish to fund and carry out themselves since an occupier carrying out any such work, which has not been agreed in writing by a surveyor, may be responsible financially for reinstating the property to its former condition. The Repair of Benefice Buildings Measure 1972 sets out an occupier's liability in such matters. Clearly, this does not apply to putting up shelves, altering curtain tracks, hanging pictures, normal decorating and the like, but it does apply to altering kitchens, fixed floor coverings, plumbing and heating installations and all structural and finishing materials.

Under no circumstances should any occupier modify the gas or electrical installation. This could be very dangerous and might even invalidate insurance cover on the premises and the contents.

Allowing part of your home to be used as an office with paid or voluntary staff greatly extends your responsibilities and you should ensure that all relevant legislation is complied with.

The Parsonage and Property Maintenance Committee has considered the way the Disability Discrimination Act 1995 applies to parsonages. It accepted the advice that a parsonage is by definition a dwelling occupied by the Incumbent and his or her family and therefore the Act did not

apply. However, it is known that there are a number of parsonages where there is a parish office within or attached to the dwelling. Where such a situation exists it is considered that the Act applies to that part of the building used as an office. Under these circumstances, Incumbents and Parishes are advised that:

1. the use should cease and the room revert to parsonage or
2. the parish must agree with the Diocesan Surveyor an appropriate means of compliance with the Act and implement and fund the necessary works or
3. the use involving public access should be relocated to a suitable alternative building.

When determining how to resolve the matter the parish must bear in mind that the cost of any enabling works and the actual modifications to a parsonage will have to be an outright gift to the benefice and the costs will not be reimbursed should the parsonage be sold or replaced at some future date.

3.14 Parish Property

Any matters relating to properties owned by parishes (other than maintenance which is the responsibility of the PCC as Managing Trustees) should be referred to the Property Department in the first instance that will provide advice and assistance.

Such assistance will include advice and when appropriate instructing professional advisors on behalf of the parish in matters relating to the sale of freehold or leasehold interests, the granting of easements, licences, tenancy agreements etc. and will ensure that the Diocesan Board of Finance's (in its capacity as Custodian Trustee) and the PCC's duties, in relation to Charity Law, are properly discharged.

3.15 The Property Department Staff

The following officers currently staff the Property Department:

Diocesan Surveyor	Eric Greber
Deputy Diocesan Surveyors	Andy Avery
	Richard Djan-Krofa

Clerk of Works	Dion Butler
Senior Property Officer	Debbie Highwood
Assistant Property Officer	Sarah Derriey
PA to Diocesan Surveyor	Sue Magnan
Secretarial Assistant	Tracey Homewood

If you have any concern whatsoever about the property which you occupy, please do not hesitate to call the Property Department on 020 7939 9400.

4.00 - Policies adopted by the Parsonage & Property Maintenance Committee

The following policies have been adopted in relation to the houses for which the Committee is responsible.

4.01 Internal Decorations

- a) Appropriate grants are determined at Vacancy Works stage for Parsonages and Diocesan Glebe houses, at the joint discretion of the relevant Archdeacon and the Surveyor. These are paid at the same time as the Settling In Grant.
- b) In recognition of the fact that it is undesirable for the internal decorative condition of houses to deteriorate when Incumbents are in post for a long term, grants ranging from £1,000 to £2,000 dependant upon the size of the property are available at 10 year intervals.
- c) In order to encourage clergy to maintain the interior condition of houses, interim grants of £75, £199 and £150 are available on demand, dependant upon the size of the property.
- d) Grants outside these parameters will be considered and determined by the Parsonage & Property Maintenance Committee.

4.02 Central & Secondary Heating

Existing Houses

Where properties have full central heating, secondary heating will not normally be provided, although surveyors have discretion to act as they see fit in exceptional

circumstances. Where properties have accommodation over and above Church Commissioners' standards, heating will not be upgraded beyond those standards to cover the entire house. When existing gas fires reach the end of their useful lives they will generally be replaced with electric fires.

New Houses

To provide new houses with:

- (a) full central heating
- (b) secondary heating in the principal living room and an electric fire in the study

4.03 Central heating controls

Central heating installations will be controlled by a combination of a programmer, one or more motorised valves and room thermostat(s). Thermostatic radiator valves will not generally be provided neither will they be renewed when, in an existing installation, they come to the end of their lives.

4.04 Central Heating Maintenance, Gas Fire Maintenance & Testing of Gas Installations

It is the responsibility of the Diocese to service boilers, gas water heaters and gas fires and test gas installations. Arrangements for annual servicing and testing will be made by the Diocese. Occupiers are asked, in the interest of their own safety, to fully co-operate with those firms appointed to service boilers and to test gas installations. Quick and easy access to the property for service engineers is a prerequisite for safety. Gas installations and appliances which are not regularly serviced can be lethal.

Any defects arising between servicing should be brought to the immediate attention of the Property Department and they will make arrangements to rectify matters. Any defects arising as an emergency between servicing should be dealt with as set out in paragraph 3.05.

4.05 Boiler replacement

Boilers will only be replaced when:

- a) they come to the end of their life
- b) they are inadequate for any extended heating installation

(regard to the age of the boiler will determine whether a heating installation is extended within the Surveyor's discretion).

N.B. Boilers will not be changed because of a change in fuel costs.

4.06 Double Glazing

- a) Secondary Glazing to limit sound penetration is only installed, at the discretion of the Committee, when there is a need to provide sound insulation against unreasonable noise such as aircraft, traffic, factory noise etc.
- b) Secondary Glazing to improve thermal insulation is not provided, although at the time of issue of this publication this issue is being reviewed.

Existing Houses

Double glazing is only installed when existing windows have to be replaced.

New Houses

All new houses are built with double glazing to all windows.

4.07 Thermal Insulation

Surveyors will review thermal insulation within roof spaces during the Vacancy Works.

4.08 Smoke Detectors

Existing Houses

The installation of smoke detectors in existing Diocesan houses is a matter for individual occupiers to decide upon and finance, but occupiers are recommended to install smoke detectors for their own benefit.

New Houses

Two interconnected smoke detectors will be installed.

4.09 Burglar Alarms

Burglar Alarms are installed under the following circumstances:

Existing Houses

- a) in existing houses at the joint discretion of the Chairman and the relevant Archdeacon, following a request from an

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occupier after a burglary has occurred

- b) when required by insurers as a condition before giving cover for house contents
- c) if requested prior to a new occupier taking up occupation
- d) where there is a perceived need identified by the relevant Archdeacon.

New Houses

Alarms are provided in all new houses.

Alarm Specifications

- a) Digital communicators will only be installed or existing systems upgraded to digital communicator standard where the Parsonage & Property Maintenance Committee consider it appropriate.
- b) Where digital communicators are installed they will only be provided on the understanding that all extra over costs such as Red Care protection, dedicated telephone lines, BT 3 way calling service, Police charges etc. are born by the occupier or the parish as may be appropriate.

4.10 Security

The intention is to provide, if not already fitted, the following:

- a) key operated security locks to all opening windows at basement level, ground floor level and those windows immediately accessible from roofs over single storey parts of the house
- b) key operated security bolts to external doors (other than front entrance)
- c) 5 Lever BS Mortice locks to all external doors (except french doors)

4.11 Showers

Existing Houses

New showers will be installed, when appropriate, at Vacancy Works schemes.

New Houses

High specification showers will be incorporated in all new

houses.

4.12 Shaver Sockets

Existing Houses

Shaver sockets are not provided unless an occupier bears the cost.

New Houses

Shaver sockets are fitted in bathrooms and shower rooms only.

4.13 Cookers

a) The provision and maintenance of cookers is an occupier's responsibility as is its maintenance and replacement.

(When gas installations are tested gas cookers will also be tested and occupiers will be told of any defect in the cooker so that they may immediately take the appropriate action to ensure their own safety and the safety of those with whom they live.)

b) If any occupier moves into a house which has a cooker then that cooker is to be regarded as theirs by gift to do with as they see fit.

c) Safety chains fitted to cookers are a requirement under the Gas Regulations and should be fitted as and when cookers are installed.

4.14 T.V. Aerials, Telephones, and Curtain Tracks

Existing Houses.

Occupiers are responsible for these costs.

New Houses

In new houses a T.V. aerial, basic telephone wiring and curtain tracks will be provided.

Satellite dishes may be fixed to the building at the cost of the occupier. The dish is to be removed at the time of vacation. Any damage caused by the installation or removal is to be made good at the cost of the occupier.

4.15 Gardens

a) Costs for gardening matters will only be borne in the most exceptional circumstances at the discretion of the

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Committee.

- b) Lawns are laid when new houses are built and planting will not normally exceed that needed to comply with the requirements of the Planning Consent.
- c) Gardens will be made good to a reasonable standard if substantially disturbed by repair works.

4.16 Trees

Trees will only be felled, pruned or thinned when not to do so would be:

- a) to imperil the occupants of the house
- b) a danger to third parties
- c) a potential danger to the structure of a Diocesan building
- d) to invite third party claims
- e) considered particularly un-neighbourly (each case will be examined on its merits)
- f) more than normal householder's gardening.

Occupiers are asked to remove all small trees or self sown saplings immediately adjacent to house or outbuildings as routine gardening. Such helpful action may very well be a way of avoiding considerable future upheaval to occupiers as it is a means of preventing major structural defects.

4.17 External Taps

Existing Buildings

External taps are only provided if the cost is borne by the occupier. If installed by an occupier it is necessary to bear in mind Water Authority By-Laws which require anti-syphonage provision.

New Houses

External taps are generally provided.

Where external taps are fitted, occupiers are responsible for payment of any licence necessary to use a hosepipe or sprinkler.

4.18 Sheds, Conservatories and Greenhouses

Sheds will be provided at the discretion of the Surveyor at Vacancy Works stage where houses have no other suitable external storage such as a garage. In such cases they will also

be maintained. Where sheds exist but where they are not needed because alternative permanent external storage arrangements exist they will not be maintained.

Conservatories will be maintained or demolished depending upon their condition, design and maintenance costs at the discretion of the Surveyor.

Greenhouses will not be provided; neither, where they exist, will they be maintained.

4.19 Removal of Rubbish

The removal of rubbish from a Parsonage or Diocesan Glebe property is regarded as the responsibility of either an occupier or the parish. (The declaration on the Key Form is usually relevant.) See paragraph 4.24.

4.20 Stolen/Lost Keys

The cost of replacing locks when keys are stolen or lost rest with the occupier. Under such circumstances the costs incurred may be covered by an occupiers contents insurance cover.

4.21 Pests

The cost of removing pests such as mice, wasps, bees, ants etc., rests with an occupier. The Diocese will bear the costs arising out of rats and squirrels if they are entering the building as a result of defects in the building. The Diocese will also bear the costs of eradicating cockroaches should an infestation arise.

4.22 Repairs. See also paragraph 3.03 Repair Works.

Surveyors will authorise repair works having regard to the following:

- a) replacing defective detailing where it exists so as to minimise future maintenance. (The exception is to patch repair when other considerations are paramount)
- b) providing a high standard of traditional detailing so as to make long-term savings
- c) providing good value for money
- d) doing what is necessary to protect the investment value of property

- e) responding as a matter of urgency to day-to-day defects such as: leaking roofs, leaking pipes, failure of heating or electrical installations and damage by burglars or vandals
- f) any budget constraints.

4.23 Work carried out on instructions of Occupiers

- a) Occupiers commissioning the repair of any matters, whether arising as an emergency or not, either during or out of normal working hours, will only be reimbursed *reasonable* costs incurred for a job satisfactorily completed.
- b) Any work authorised by an occupier without reference to the Property Department is done at the occupier's risk. The occupier is responsible for paying all accounts relating to such work.

Warning

Attention is drawn to the warning given in section 3.03 Emergency Repairs and the attendant risks of employing firms selected from directories.

4.24 External Decorations

Generally external redecorations and any needed repairs will be carried out on all Diocesan property on a five year cycle. Historic Glebe properties which have been severed from overlarge parsonages leaving a reduced size parsonage in current use are externally decorated with the parsonage.

Residential Glebe properties which do not adjoin parsonages are decorated on a five year cycle administered from the Diocesan Office.

Non-residential Glebe property is let on full repairing leases placing liability for decoration upon the tenant.

4.25 Key Forms

Key Forms are issued by Heather Cassidy from the Diocesan Office to departing occupiers and Church Wardens for signature and they are returned to the Diocesan Office. These forms provide information concerning the dates when properties will be vacated, the whereabouts of keys when a

property is about to be vacated and provide confirmation that all goods and chattels are cleared and the house is left completely vacant. These forms are also an important means of ensuring the Diocesan Office is fully aware of when houses may become prone to vandalism and squatting. It is important that the code for intruder alarm systems is included on the Key Form.

Assistance is sought from all those responsible for completing Key Forms and they are asked to return them to the Episcopal Area Office at the earliest possible date. This will help to ensure that the vulnerability of empty properties is minimised.

4.26 Parking Charges

In those cases where a parsonage, occupied by an Incumbent, has no off street parking/garaging facility the Diocese will bear the cost of one Local Authority on street car parking permit in those cases where free on street parking is not available. It is only available for the benefit of an Incumbent. The scheme does not extent to providing parking for any other members of Diocesan staff.

4.27 Maintaining External Security Lights

Where external security lights are not readily accessible the cost of re-lamping will be born by the Diocese. Where they are as accessible as normal domestic internal light fittings re-lamping remains an occupier's responsibility, as is the case for normal tungsten lamps or fluorescent tubes within a property.

4.28 Wood Block and Mosaic Floors

At the discretion of the Surveyor defective wood block or mosaic ground floors may be sanded and sealed provided that the occupier bears 50% of the cost.

5.00 Parish Owned Property

5.01 Parish Property Transactions

Any parish contemplating any property transaction be it buying, selling, leasing, or developing property should notify the relevant Archdeacon of their proposals. Secondly they

should notify in writing the Property Department, which will need to be involved, at the earliest possible opportunity. See also paragraph 1.06 dealing with Parish Property.

5.02 Joint Property Transactions

There are often occasions when it is possible for Diocesan and parish property problems to be most satisfactorily resolved by both parties acting together. For instance, it may be that the parish hall is at the end of its life and a joint project can solve both a parsonage and hall problem by providing new premises for both where it might otherwise be impossible for either party to resolve their problem unilaterally because of various constraints. Where such opportunities arise it is most important that discussions are opened at the first opportunity so that joint appointments of professional advisors acceptable to both parties may be made and fees shared. Such schemes can often be particularly advantageous by facilitating an adjustment of site areas and boundaries. Great care is needed in all matters if such a scheme is to succeed and the need for Diocese and parish to work together from the conception of the idea cannot be overstated.

5.03 The use of professional advisors

Parishes contemplating property transactions are urged to seek appropriate professional advice. It is in the best interest of any parish to have sound advice before embarking on any project involving property and because of their statutory duty to comply with The Charities Act 1993 suitably qualified professional advisors are a necessity. Parishes are advised to contact the Property Department over the appointment and instruction of suitably qualified advisors before making any appointments and incurring professional fees. Because of the need for the Custodian Trustees to comply with Charity Law it is usually helpful if instructions to professional advisors are given by the Property Department on behalf of both the Diocesan Board of Finance and the PCC. This can save considerable time and can also prevent parishes incurring additional fees to comply with Charity Law certification.

A booklet entitled *Employing Professional Consultants and*

Buying and Selling Parish Property is available for the guidance of parishes. Upon request the Diocesan Surveyor can provide copies of this booklet which deals with many relevant issues and pitfalls. Parishes proposing to appoint professional advisors are urged to obtain a copy of the booklet.

Before confirming any instructions to professional advisors it is most important that the PCC agree the fees which will be charged for the work undertaken.

When instructions are given by an Incumbent it should always be after a PCC resolution and they should be clearly given in the name of the PCC, otherwise the Incumbent could be personally liable for fees incurred.

5.04 Duties of PCCs in relation to parish property

Parishes are reminded that they have statutory duties toward those living in parish houses whether they occupy the property as a tenant or as assistant clergy. Particular attention is drawn to their duties under the Gas Regulations to arrange for gas appliances to be serviced and gas installations tested on an annual basis with written reports being provided for occupants. It is a criminal offence not to undertake these duties.

In the event that the PCC undertakes building works it has duties under the European Directive on Health and Safety matters. These issues are not necessarily straightforward. It is suggested that parishes who face substantial building work on any of the properties for which they are responsible seek advice from the Property Department if they are not clear on their duties and their consultants do not provide direct advice. Again breaches of this Directive are criminal offences.

Statutory duties relating to church halls will vary and are dependent upon the use to which they are put but in most cases the following regulations and necessities, as they relate to the building, should be borne in mind:

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- Fire regulations and the need for compliance by means of self certification
- Local Authority regulated matters such as Food Hygiene and the requirements for young children using the premises
- Licenses for the sale of alcohol, music and dancing
- Insurances for particular uses and third party liability insurance
- The Gas Regulations
- Disabled Access
- Planning Restrictions if a proposed use is outside the normal use of a church hall
- Testing of electrical installation and appliances
- General Health and Safety matters
- Defective Premises Act.

The list is not necessarily complete and specific uses should be reviewed and analysed and where appropriate legal advice sought.

5.05 Planning Legislation

Parishes should be aware that the legislation and process of Town and Country Planning has changed very considerably over the last few years. Local Authorities are now required to produce Local Development Frameworks (LDFs) and these documents, that are subject to a public consultation process, ultimately guide as to what planning permissions will be granted. Parishes are urged to think well ahead about any development proposals that they might wish to implement so that they can influence the formation of policies that might otherwise preclude their proposal. The Diocesan Surveyor is always willing to advise on such issues.

**SECTION C:
RULES AND REGULATIONS
FOR THE SOUTHWARK
DIOCESAN ASSOCIATION
OF READERS**

Section C: Rules and Regulations of the Southwark Diocesan Association of Readers

becoming a Reader

This section outlines the procedures for selection for training and admission and licensing of a new Reader.

1. Selection for Reader Training

Prospective candidates for selection for Reader training are required to obtain the support of their Incumbent and PCC, and to attend a Vocational Guidance Unit (VGU).

1.1. The candidate will then be required to attend an interview with the Director of Reader Selection.

1.2. Upon receipt of completed application form and references (from the Incumbent, a member of the parish, and a non-church referee) the candidate will be invited to attend a selection conference.

1.3. In nominating a candidate, the Incumbent undertakes to support the candidate through training and the PCC accepts responsibility for all fees and expenses incurred. Candidates must be baptised and confirmed members of the Church of England.

The candidate will commence the Reader training course the following September if selected.

1.4. Applications should be made in the first instance to the Director of Reader Selection c/o The Training Administrator at Trinity House.

For further information please see the leaflet 'Selection & Training for Reader Ministry - Guidelines for Candidates & Incumbents'.

2. Initial Training

The training consists of a three year part time course. The sessions are held on a week day evening, but there are several Saturday sessions.

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Candidates who have undertaken significant relevant training in other disciplines may be considered for remission of one or more units at the discretion of the Director of Training.

The Course is moderated nationally by the Central Readers Council and successful candidates are awarded their certificate, which is recognised in all Dioceses.

For further information concerning the training course and its commitments please contact the Director of Training.

3. Admission

- 3.1. Candidates are awarded the National certificate upon the successful completion of the course.
- 3.2. Before Admission, candidates are required to make a declaration of assent and obedience, affirming adherence to the doctrine of the Church of England. Candidates take this oath before the Diocesan Bishop or his representative.
- 3.3. Candidates are Admitted to the ministry at the Service of Admission and Licensing which takes place on an annual basis in Southwark Cathedral in October of each year.
- 3.4. Readers can be Admitted to ministry once only. This will not be repeated if the Reader were to move Dioceses. Admission to ministry does not confer the authority to officiate.
- 3.5. Candidates are given a Certificate of Admission and a copy of the New Testament.

4. Licensing

- 4.1. The License confers upon the Reader the Bishop's authority to exercise the Office of Reader in that Diocese. The Licence names the parish or specific area where the Reader may officiate; it also names the Priest (usually the parish Incumbent) to whom the Reader is responsible.

Note: if licensed during an interregnum the named Priest will be the Archdeacon.

- 4.2. New Readers are usually licensed at their Admission Service, but this is also the opportunity to license and welcome Readers who have transferred from another Diocese.

- 4.3. Before Readers are licensed they are required to make and sign a declaration affirming their willingness to abide by the regulations of the Diocese and to accept the authority of the Bishop.
- 4.4. Before Readers are licensed they must have a valid Clearance for Child Protection.
- 4.5. Readers must surrender their Licence or Permission to Officiate if it is revoked by the Bishop.

Conduct of Reader Ministry

This section defines the legal and general parameters of what a Reader can and cannot undertake as a Reader.

5. Defining Personal Ministry

- 5.1. The actual ministry that a Reader undertakes will be defined by agreement between the clergy to whom they are licensed and the Reader. This must be agreed either verbally for Readers licensed up to and including 1999, or in writing using the standard Southwark Diocesan Association of Readers (SDAR) Working Agreement for those licensed from 2000. The Reader's duties must be reviewed on an annual basis.
- 5.2. The Reader may not be asked to undertake any duties which contravene Canon Law applicable to Readers.
- 5.3. If a Reader transfers parishes or there is a new Incumbent, then a new working agreement must be drawn up in writing. This will apply to all Readers regardless of when they were licensed. This must then be reviewed annually as above.

6. Duties of Readers

- 6.1. The Primary duties of Readers are to preach and teach and to conduct worship or assist in conducting worship.
- 6.2. Readers also assist in the pastoral, evangelistic and liturgical work of the Church in the parish or area to which they are licensed, or have PTO status.

Reader Ministry is Authorised under Canon Law

The Canons E4; E5; E6 *See Appendix A*

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6.3. Authorised Ministry

- 6.3.1 Preach at any service in the parish or district to which they are licensed or in which they have PTO.
- 6.3.2 Lead acts of worship including morning and evening prayer and other non-sacramental services. They must use a form of blessing and absolution which is 'inclusive' and 'conditional':
'May God have mercy upon us, pardon and deliver us from all our sins ... and May the blessing of God almighty, the Father and Son and the Holy Spirit, be among us.'
- 6.3.3 Lead and assist at parts of the Holy Communion service and assist at other sacramental services.
- 6.3.4 Lead the whole service of 'Holy Communion by Extension' only with the authorisation of the Diocesan Bishop, upon receiving a written request of the PCC.
This is currently forbidden within the Diocese of Southwark by the order of the Bishop of Southwark.
- 6.3.5 Read Old or New Testament readings, the Epistle or the Gospel at any service.
- 6.3.6 Lead intercessions.
- 6.3.7 Receive and present the offerings of the people.
- 6.3.8 Distribute the consecrated bread and wine to the people, to take Communion to the sick and housebound.
- 6.3.9 Publish the banns of marriage in the absence of the Priest.
The Reader must sign the banns book, but not the certificate of banns, which must be signed by the Incumbent.
- 6.3.10 Conduct funeral services.
This duty is upon the invitation of the Priest of the parish.

The Reader must have undertaken the Southwark Funeral course for Readers and subsequently be authorised to do so.

6.3.11 Undertake pastoral work

This may include such duties as listening to individuals and offering prayer and the consolation of the word. It could include visits to the bereaved; it may involve formal duties such as visiting a local Residential Home and 'befriending' residents.

6.3.12 Undertake educational work.

This may include leading prayer groups and Bible study courses, Baptismal preparation, Confirmation preparation, Marriage preparation, Sunday School or youth work. It could also involve communications with institutions outside the church to assure them of our involvement within the whole of society.

6.3.13 Readers may accept invitations from a church of another denomination* provided that the duties they undertake in the service are similar to those they are authorised to perform in the Church of England. Readers must discuss the invitation with their own Incumbent and obtain the approval of the Incumbent of the parish where the service is to take place. Where this is to be a regular duty Readers must also contact the Registrar of Readers and obtain Permission to Officiate from the Area Bishop.

** Church of England (Ecumenical Relations Measure 1988.)*

6.3.14 Give assistance to any minister as the Bishop may reasonably direct.

6.4. A Reader May Not

6.4.1 Administer the sacrament of Baptism

This is only permissible in an emergency, when any lay person may baptise.

6.4.2 Communion by Extension

This is not allowed in this Diocese by order of the Bishop of Southwark.

Section C: Rules and Regulations for Readers

- 6.4.3 A Readers Licence allows them to officiate only in their own Diocese
Invitations to preach or officiate on any occasion in a different Diocese should be referred to the Bishop of that Diocese, usually through their Warden of Readers.(Contact the Registrar of Readers for details.)

7. General Conditions of Licensing and Permission to Officiate

7.1. Child Protection

All Readers must complete the Disclosure Procedures which the Diocese conducts through the Criminal Records Bureau. A Reader will be required to renew their disclosure when the Diocese requests it.

- 7.2. Liturgical Dress of Readers The normal dress of Readers is black cassock, surplice and plain blue scarf. Readers may chose to wear a 'degree hood' on more formal occasions. A cassock alb with blue scarf may be worn at celebrations of Holy Communion, if that is the custom of the parish.

7.3. Officiating at Funerals

- 7.3.1 Readers are required to undertake a recognised course of training. The Reader should apply to the Director of CME for details. It is recommended that no Reader should undertake the Funeral Course until at least two years from date of Admission.
- 7.3.2 After completion of the Funeral Course the Reader is expected to undertake practical training with their Incumbent in the parish.
- 7.3.3 A Reader may only take funerals with the permission of their Incumbent.
- 7.3.4 Funeral Fees Reader Ministry is voluntary and no Reader in this Diocese is permitted to accept fees for their work. Expenses may be claimed.
- 7.3.5 All Fees should be passed to the parish treasurer for onward payment to the Diocese.

8. Licence Procedures

All Readers in active ministry must hold a valid Bishop's Licence.

8.1. Licensed Readers

- 8.1.1 Licences are issued for a period of three years for all Readers until they reach the age of 70 years.
- 8.1.2 The year of renewal is the same for all Readers. i.e. for new Readers their initial licensing period will vary from one to three years depending on the year in the cycle they are licensed.
- 8.1.3 The application for relicensing must be countersigned by the Priest to whom the Reader is responsible and returned to the Registrar by the date specified on the relicensing form. The licence will automatically lapse if these conditions are not met.

8.2. Permission to Officiate

- 8.2.1 A Reader will be required to apply for Permission to Officiate (PTO) status for the year following their 70th birthday should they wish to continue in active ministry. This status must be renewed annually.
- 8.2.2 The Registrar will send the Annual PTO form to the qualifying Reader automatically. The Area Bishop will be informed by the Registrar and a Certificate for Permission to Officiate will be issued in due course.
- 8.2.3 The Reader must return the original Licence to the Registrar for cancellation.
- 8.2.4 Readers who regularly officiate in more than one parish (e.g. Readers with holiday homes, those who work and travel for a charity or another Diocese) may hold a licence to their local parish and can also apply for PTO for the secondary duties. Contact the Registrar of Readers for details.

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- 8.3. The Reader should agree with their Incumbent what duties and responsibilities they will undertake. It is recommended that this be set out using the standard Working Agreement form. The Working Agreement is compulsory for all Readers licensed since 2000.
- 8.4. The application for relicensing must be countersigned by the Priest to whom the Reader is responsible and returned to the Registrar by the date specified on the relicensing form. The licence will automatically lapse if these conditions are not met.

9. Interregnum

During an interregnum a Reader is under the authority of the Archdeacon. This may be delegated to the Area Dean if the Archdeacon so chooses. Therefore all matters relating to renewal of licence, Working Agreement and responsibilities in the parish and pastoral care should be referred in the first instance to the appointed person.

- 9.1. The Reader has a duty to inform the Registrar that there is an interregnum in their parish.
- 9.2. New Incumbent The Reader and the Incumbent have a period of six months of joint evaluation after which they are to draw up a Working Agreement. After this is completed the Reader should send their licence to the Registrar for endorsement of the transfer.
- 9.3. In event of the Incumbent and the Reader failing to agree on re-nomination, the evaluation period shall be extended for a further six months to allow consultation with appropriate support from SDAR and the Area Dean.

10. Transfers

10.1. Transfer within the Diocese

A Reader may transfer to another parish within the Diocese.

- 10.1.1 Upon arrival in the new parish the Reader should notify the Incumbent of their former status if they are considering that they will in due course wish to act as a Reader in that parish.

- 10.1.2 After the Reader has worshipped in the new parish for an appropriate period, usually six months, and the Incumbent and the Reader are agreed that the Reader should take up ministry in the new parish, the Registrar should be contacted to deal with the administration of the transfer.
- 10.1.3 Administration of Transfer
- 10.1.3.1 The Registrar will check with the previous parish to establish that the Reader was in 'good standing' when he/she left the parish. If the requirement is not met satisfactorily, then the Reader may request to invoke the grievance procedure if the transfer is refused.
- 10.1.3.2 A formal motion at a PCC meeting must agree to the Reader's ministry in the parish.
- 10.1.3.3 Child Protection checks must be redone.
- 10.1.3.4 The Reader is required to return their License for endorsement.
- 10.1.4 Transfer from another Diocese**
A Reader may transfer from another Diocese to the Diocese of Southwark.
- 10.1.5 The Reader should notify the Incumbent of their former status if they are considering that they will in due course wish to act as a Reader in that parish.
- 10.1.6 After the Reader has worshipped in the new parish for an appropriate period, usually six months, and the Incumbent and the Reader are agreed that the Reader should take up ministry in the parish, the Registrar should be contacted to deal with the administration of the transfer.
- 10.1.7 The Registrar will check with the previous Diocese to establish that the Reader was in 'good standing' when he/she left the Diocese. If this requirement is not met satisfactorily, then the Reader may request to invoke the grievance procedure.

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10.1.8 A formal motion at a PCC meeting must agree to the Reader's ministry in the parish.

10.1.9 Child Protection check must be completed.

10.1.10 The Reader is required to return their License for endorsement.

10.2. Transfer to another Diocese

The Reader would be required to follow the procedure laid down by the Diocese to which they are transferring. The procedure would be similar to the steps outlined in the Southwark transfer in procedure.

The Registrar of Readers in Southwark would be approached by the Registrar or Secretary of the new Diocese with regard to 'good standing'.

11. Redeployment

The redeployment of Readers on a temporary basis to another parish is currently under review.

There is a pilot scheme for Readers who have been licensed from 2000 to undertake a three month redeployment in another parish.

12. Resignation

A Reader may resign from office at any time.

12.1. The Reader shall notify the Registrar of resignation in writing.

12.2. If a Reader wishes to resume ministry at a later date then they will need to follow the procedures as in a transfer to a new parish.

13. Retirement/Readers Emeritus

There is no age regulation concerning retirement.

13.1. Readers are admitted to the Office for life and retain the right to attend and vote at the Area and Diocesan meetings. They may also be invited to robe and officiate up to a maximum of four times a year.

13.2. Readers should consult with their Incumbent so that both the Reader and the parish achieve closure to the ministry.

Parishes should be given an opportunity to give thanks and celebrate the ministry of the Reader. A certificate may be issued on request.

- 13.3. The retiring Reader should notify the Registrar of their decision.
- 13.4. It is appreciated, if the Reader Emeritus no longer wishes to receive communications from the Diocese, to notify the Registrar.

14. General

14.1. Sabbatical

Readers should be routinely considered for a 'sabbatical' from regular duties, on a timescale in line with clergy sabbaticals, that being after seven years in ministry. The period of release from regular duties should be used for spiritual refreshment, training and project work. The Director of Continuing Ministerial Education may be contacted for advice when planning a sabbatical.

14.2. Finance Fees & Expenses

- 14.2.1 The parish is responsible for the payment of Licence Fees.
- 14.2.2 In cases where a Reader is licensed to a parish and also has PTO to minister elsewhere both parishes, or institutions, have a duty to pay the appropriate fees to SDAR.
- 14.2.3 Reimbursement of expenses incurred during ministry are to be agreed with the parish.
- 14.2.4 Funeral fees are to be passed to the parish Treasurer for payment to the Diocese.

14.3. PCC Membership

Readers are not automatically members of the PCC. Readers may be nominated and elected in the normal way.

The PCC may have a policy to appoint Readers (or one or two if there are several in a parish) as ex officio members.

15. Readers Records

The Southwark Registrar of Readers is required to keep a 'Register' of all Readers holding a Licence or with PTO in the Diocese. The record keeping consists of three separate entities.

15.1. Register of Readers

There is a bound volume containing the names of all Readers licensed to the Diocese since 1908. Readers admitted and licensed each year are recorded in this book.

15.2. Database of Readers

The database holds all appropriate current information on each Reader. The main sections are: personal details; contact details; training details; ministry statistics and Reader status. The database is held and maintained on the Diocesan server system and is accessible at Trinity House, the Diocesan offices. A read-only copy is held by the Registrar for administration purposes.

The database is updated by authorised personnel only. Currently these consist of the Diocesan IT Manager, the Registrar and the SDAR administrative assistant.

15.3. Manual Files

There is also a paper file on each Reader active in the Diocese.

If a Reader transfers to another Diocese the file is sent to the Registrar of the receiving Diocese. When a Reader becomes inactive, through retirement or resignation, the file is kept for 5 years and then destroyed (due to lack of storage space).

15.4. Any Reader is entitled to view any of the records pertaining to themselves. The Registrar should be contacted to arrange an appointment. A small administrative fee may be charged. In accordance with the Data Protection Act, third parties are not eligible to access to information without the consent of the first party.

15.5. In the case of a Reader who has had their licence withdrawn by the Bishop for disciplinary reasons the file will be stored by the Registrar until the information is requested through transfer to another Diocese (see above) or the death of the Reader. (Readers are Admitted to the Office for life.)

16. Annual Reports

16.1. All licensed Readers, and those with 'Permission to Officiate', are required to complete an annual report. This document serves three purposes:

- to furnish information to the Registrar so that he/she may make accurate statistics for Diocesan and national use;
- to provide a basis for discussion at the Reader's annual review with the Incumbent;
- to provide a vehicle for communication between Reader and the Readers' Board e.g. requesting further training.

17. Annual Services and General Meetings

17.1. Readers are encouraged to attend the annual Readers' Admission Service held in the Cathedral in October to welcome new Readers.

17.2. All Readers are required to attend one of the Annual Services of Relicensing or Rededication. These are held at the end of January and the beginning of February.

17.3. The Service and AGM will be held in each Area or alternatively a Diocesan event may be arranged. This will be determined by the SDAR Board. Readers will be notified in good time.

17.4. If Readers find they are unable to attend the services (due to ill-health for instance) they should write to the Registrar to record the circumstances.

17.5. Before or after the service there is a General Meeting where a report of the activities of the Board and the annual accounts are received and are open for questioning and debate.

Nominations for Board membership are announced and elections are held in accordance with the SDAR Constitution.

All Readers have the right to raise an issue of general Reader interest for discussion at the meeting. In order for this to be included on the Agenda the Registrar must receive notice in writing not less than two working weeks before the date of the meeting.

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- 17.6. All Readers attending, whether licensed, PTO or Emeritus, may vote.
- 17.7. The Annual Service and Meeting may be preceded or followed by a Training Event, organised by the Director of Continuing Ministerial Education or an alternative event determined as appropriate by the SDAR Board.
- 17.8. From time to time, Area Wardens may call meetings of Readers within their Area.

18. Continuing Ministerial Education

Bishops' Regulations for Reader Ministry 2000 state: "Dioceses should require Licensed Readers to undertake post-admission training... and provide financial help for them to do so... Central Readers' Council arranges regular national conferences and an annual study course at Selwyn College, Cambridge."

- 18.1. Apart from the training events at the annual service and meeting, the Director of Continuing Ministerial Education makes available a comprehensive range of courses throughout the year. Some of these are specifically targeted for Reader Ministry; some are designed to be inclusive to all people who minister in the Diocese.
- 18.2. The Readers' Board sets aside a percentage of funds each year to provide bursaries for training events. Some events are funded directly so that there is no charge.

19. Grievance Procedure

Readers are required to adhere to the Canons and the Southwark Diocesan Association of Readers Rules and Regulations in respect of conduct.

The Reader is licensed to the Incumbent or in an interregnum to the Archdeacon. The Incumbent/Archdeacon is under Canon Law permitted to withdraw or decline to renew the licence of a Reader within the parish. If this circumstance arose not from mutual consent, then the Reader would be permitted to appeal under the grievance procedure.

The Bishop of the Diocese may revoke the licence of any Reader at any time.

19.1. This procedure is to be available to Readers or their Incumbents in the following circumstances:

- Pastoral breakdown
- or to review/appeal against the withdrawal of a licence by the Incumbent
- or the revoking of a Reader's licence by the Bishop
- or in any other circumstances that the Warden deems appropriate.

19.2. Before any procedure relating to a grievance is embarked upon it is essential that both parties have talked the matter through thoroughly and tried to resolve the matter between themselves.

It is also recommended that both parties discuss the issues with their Spiritual Directors or another suitable person.

In a situation where the grievance is within a Team Ministry, the structures of the Team may be useful in trying to resolve the problem.

19.3. Where a grievance cannot be resolved after attempts outlined above then the following procedures should be followed.

19.3.1 The Reader should discuss the matter with their Area Warden.

19.3.2 The Incumbent should discuss the matter with an appropriate member of the clergy.

19.3.3 The two parties should then decide if they can meet again to resolve matters.

19.4. In the event of this not being possible then the Incumbent and the Reader should meet with the Area Dean.

The procedure under Appendix C should be followed, with particular attention to identifying the issues to be discussed.

19.4.1 The Reader is allowed to have an appropriate Reader supporter with them at this stage. This would be expected to be, but not necessarily so, to be either the Area Warden or the Sub Warden.

19.4.2 If there was no resolution at this stage then the matter should be referred to the Archdeacon.

19.4.2.1 The Archdeacon should review the matter and consult with relevant parties.

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19.4.2.2 The Archdeacon shall then decide if a meeting of the Incumbent and the Reader with him/her would be helpful to progress the matter further.

19.4.2.3 If the matter is not resolved at the meeting or if the Archdeacon decides that a meeting is not constructive then the matter will be referred to the Grievance Panel.

19.5. Grievance Panel

19.5.1 Members shall consist of:

- the Area Bishop - who would chair the meeting
- the Warden
- a nominated member of the Board (not from the complainant's area)
- the Registrar.

19.5.2 Procedure for the meeting

To be held in accordance with Appendix B.

19.6. Final Appeal

Can be made to the Archbishop in accordance with Canon E6.

20. Discipline

20.1. Readers are required to follow the regulations. Failure to do so can result in suspension from active ministry for both Licensed and PTO Readers.

20.2. If a Reader is suspended then he/she may not carry out any of the duties defined under the Duties of Readers section of SDAR rules and regulations.

20.3. The Reader must be notified in writing of the suspension and the condition under which the suspension has been imposed.

20.4. Any Reader subject to suspension is automatically barred from standing or being a member of the SDAR Board.

20.5. Suspension may be imposed under the following conditions.

- Failure to return Licensing or PTO renewal forms by the date required.
- Failure to ensure that the annual Fee is paid.

- Failure to complete a CRB check when requested to do so.
- Where a dispute has arisen under the grievance procedure.
- Or any other circumstance deemed appropriate for suspension by the Warden, Sub-Warden and Registrar in mutual agreement.

20.6. Suspension of a Reader

The final decision on suspension will be made by the Warden in consultation with appropriate parties.

Appendix A ***Canon Laws***

Readership is an office recognized by Canon, carrying with it the authority of the Church, through the Bishop, to the lay person to minister. Readers are the only lay people who are authorized to preach by virtue of the office held. This makes Readership different from other forms of lay ministry.

Canon E4

1. A lay person, whether man or woman, who is baptized and confirmed and who satisfies the Bishop that he is a regular communicant of the of Church of England may be admitted by the Bishop of the Diocese to the office of Reader in the Church and licensed by him to perform any duty or duties which may lawfully be performed by a Reader according to the provisions of paragraph 2 of this Canon or which may from time to time be so determined by Act of Synod.
2. It shall be lawful for a Reader:
 - i) to visit the sick, to read and pray with them, to teach in Sunday School and elsewhere, and generally to undertake such pastoral and educational work and to give such assistance to any minister as the Bishop may direct;
 - ii) during the time of divine service to read Morning and Evening Prayer (save for the Absolution), to publish banns of marriage at Morning or Evening Prayer (on occasions on which a layman is permitted by statute law so to do, and in accordance with the requirements of that law), to read the

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Word of God, to preach, to catechize the children, and to receive and present the offerings of the people;

iii) to distribute the holy sacrament of the Lord's Supper to the people.

3. The Bishop may also authorise a Reader to bury the dead or read the burial service before, at, or after a cremation but only, in each case, with the goodwill of the persons responsible and at the invitation of the minister of a parish or an extra-parochial place within the meaning of section 1 of the Deaconesses and Lay Ministry Measure 1972. When a cure is vacant the reference in this paragraph to the minister of a parish shall be construed as a reference to the Area Dean.

4. The current Canons contain measures relating to Readers not only in E4, but also in

E5

- relating to the nomination and admission of Readers
- and paragraph 3 is of some note:

'No person shall be admitted to the office of Reader in the Church except it be found on examination, held by the Bishop or by competent persons appointed by the Bishops for this purpose, that he possesses a sufficient knowledge of Holy Scripture and of the doctrine and worship of the Church of England as set forth in the Book of Common Prayer, that he is able to read the services of the Church plainly, distinctly, audibly, and reverently, and that he is capable both of teaching and preaching.'

E6

- relating to the licensing of Readers.

The Ecumenical Relations Measure of 1988 refers to the duties Readers may perform as part of ecumenical projects - Canon B43 (in paragraph 6) enables Readers to perform duties similar to those they are authorised to perform in the Church of England. This is providing they have the approval of the local Incumbent, and if ministry is on a regular basis then the Bishop's permission is also required.

Canon B44 sets out in detail how Readers can function in an LEP.

Appendix B

Guidelines for the Convening of the Grievance Panel and required procedures and conduct of said Panel

1. The Panel will meet to consider both written and oral submission from both the complainant and the Incumbent.
2. **Members of the Panel**
 - 2.1. Members will be appointed in accordance with the disciplinary Rules of SDAR.
 - 2.2. The names of the Panel including the nominated member of the Readers Board will be advised to both the complainant and the Incumbent.
3. **Written Submissions to the Panel**
 - 3.1. These must be submitted not less than 15 working days from the date of the meeting of the Panel.
 - 3.2. These submissions must be of a factual nature only, pertinent to the appeal to the Panel.
4. **Oral Submission to the Panel**
 - 4.1. The complainant and the Incumbent may request up to two persons to give oral evidence to the panel. This will include the person nominated as a 'friend' if wished to the complainant.
 - 4.2. Evidence given by the above may be both factual and also of a character witness statement.
 - 4.3. Attendance to the Panel meeting is voluntary.
 - 4.4. The Panel reserves the right to impose a time limit on all such evidence should this be necessary at the meeting.
5. **Consultation**

The Panel reserves the right to consult other sources if they deem this appropriate.
6. **Decision of the Panel**
 - 6.1. The Panel will make its decision within one calendar month of the meeting of the Panel.
 - 6.2. This will be passed to the Diocesan Bishop and the parties advised accordingly.

7. Records

- 7.1. Written evidence and minutes of the meeting will be held for a maximum of five years from date of hearing.
- 7.2. Such records remain the confidential property of the SDAR board.

Appendix C

Guidelines for a Reconciliation Meeting

1. The Parties will meet to consider both written and oral submission from both the complainant and the Incumbent.
2. **The Meeting**
 - 2.1. The meeting will be called under the Disciplinary section of the Rules of SDAR.
'Where it may be useful for these parties to have a meeting at this stage in the light of ideas raised during these conversations'
 - 2.2. Attendees
These should consist of:
The Area Dean, Incumbent, Complainant and a SDAR representative.
3. **Written Submissions**
 - 3.1. This will consist of any relevant correspondence of a factual nature that the parties consider relevant.
 - 3.2. Summary of identified issues.
4. **Conduct of the meeting**
 - 4.1. The Complainant and the Incumbent should address the issues set out in 3.2.
 - 4.2. Attendance at the Panel meeting is voluntary.
5. **Consultation**

The Area Dean and the SDAR representative reserve the right to consult other sources if they deem this appropriate.
6. **Records**
 - 6.1. All parties may take notes at the meeting as they so wish.
7. **Conclusion**
 - 7.1. All parties must agree as to if there has been a satisfactory conclusion to the matters raised or not.

- 7.2. The Area Dean and the SDAR representative will consider if it is necessary to proceed to the next procedure in Rules and Regulations of SDAR if the parties fail to agree in 7.1.

Readers Guidelines for Incumbents

These Guidelines are intended as a helpful guide for both Incumbents and Readers so that they may work successfully together.

Incumbents who wish to put a candidate forward for Reader Selection and training

Incumbents who wish to action a transfer in of an established Reader either from another parish or another Diocese

Incumbent moving into a parish with a Reader (or several) in situ a new experience

Incumbents who have a newly admitted and licensed Reader

Incumbents who have a pastoral difficulty with their Reader

Newly ordained Deacons and Priests

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Candidates for Reader ministry

Information and booklets are available from the Ministry and Training Department at Trinity House (see Southwark Diocesan Directory).

Regular Vocational Guidance units are held during the year for candidates to explore this ministry further. These are organised by each Archdeaconry Vocational Advisor. Candidates must attend this before an application may be made to attend a Selection Conference.

All candidates for Reader ministry must attend a Selection Conference by arrangement with the Director of Reader Selection. Those who are recommended for training then proceed onto the Reader Training Course which begins each September and lasts for three years. It is held on Thursday evenings at Southwark Cathedral. The Southwark Reader Training course is led by the Director of Reader Training.

The cost of training for Reader ministry is partly paid by the parish sending the potential Reader. The fee is presently £75 per term, £675 for three years. In addition it is hoped that parishes will support their Reader in training with the cost of theological books.

Admission and licensing of a new Reader

Completion of Training

At the end of the final year of training, in July, the candidate will be notified that they have been accepted for Admission and Licensing. This is not automatic. The Director of Reader Training has ultimate responsibility in recommending new Readers to the Diocesan Bishop.

Working Agreement

The Reader will be required to complete a Working Agreement with their Incumbent. This should include regular one to one meetings between the Incumbent and Reader (see SDAR Rules and Regulations).

Fees

The first annual fee and admission fee are collected at this time. All future annual fees will be collected by the Direct Debit. All fees are the responsibility of the parish.

Admission

All Readers are Admitted onto the register of the Central Readers Council of the Church of England. They must keep this certificate throughout their ministry.

License

The Reader is licensed as a Reader under the authority of the Bishop of Southwark. They keep this certificate whilst they are fulfilling their ministry in this Diocese. A new one is issued should the Reader move to another Diocese.

The Reader will be licensed to their Incumbent by name, or if in an interregnum, to the Archdeacon. This certificate is only valid until such time as the Incumbent changes (see p.21) or the Reader moves to another parish.

Annual Licensing Service

The annual Admission and Licensing service is held in Southwark Cathedral each October. The Incumbent is expected to attend together with a parish representative to support their candidate.

Parish Welcome

The Incumbent is expected to arrange for the new Reader to read their Licence to the congregation as soon as possible after Admission so that they know the Reader has been admitted to the office of Reader and is now authorised. This is usually part of the main Sunday service immediately following the service at the Cathedral.

The appropriate wording for use in this service will be given to the new Reader, together with any other relevant papers, at the end of their training course.

Staff Meetings

It is recommended that the Reader be included in ministry team meetings as frequently as possible. If the Reader is in full time employment, so only available in the evenings, it is suggested that meetings are held when the Reader is able to attend.

Annual Procedures

Forms

The Registrar sends forms annually to each Licensed Reader in the Diocese of Southwark (to whom they must be returned by early February). These are:

Every year

Summary of work undertaken copy of working agreement signed by Reader and Incumbent.

Details/confirmation of particulars— or change as appropriate.

Every third year

Re-licensing form which must be signed by the Incumbent or in an interregnum by the Archdeacon (or person to whom they are temporarily licensed).

Upon Reaching the age of 70

Readers who are given the Bishop's Permission to Officiate (PTO) upon reaching the age of 70 are also sent forms which must be completed and returned to the Registrar:

Summary of work undertaken

Working agreement (if applicable)

Annual PTO re-licensing form which must be signed by the Incumbent, or in an interregnum by the Archdeacon (or person to whom they are temporarily licensed)

It is recommended that the Incumbent holds a review meeting with each Reader for whom they are responsible before these forms are returned.

Fees

The annual fee will be collected by Direct Debit from the parish on 31 January each year. The fee is currently

£25 for a licensed Reader

£15 for Reader with PTO

Note

An Incumbent has the right to decide whether a Reader should be re-licensed. It is recommended that if an Incumbent wishes to

'retire' a Reader consultation takes place with the Area Warden or the Sub-Warden to ensure this happens smoothly and amicably.

An Incumbent may wish to extend the title of "Reader Emeritus" to a Licensed Reader for whom they feel it would be appropriate. Again, the Area Warden or Sub-Warden would be available to assist with this if required.

Interregnum

During an interregnum the Reader is under the authority of the Archdeacon who may choose to delegate this responsibility to the Area Dean. The Reader must contact the Archdeacon and make this personal arrangement. It is not the responsibility of the church wardens, neither are they responsible for the Reader during an interregnum.

It is recommended that when the Parish Profile is prepared the current activities of the Reader are clearly outlined. When potential clergy candidates meet members of the parish it is helpful if the Reader is included before the selection date for filling the vacancy

The position of Reader on your induction to the Parish

Once the vacancy is filled both the Reader and new Incumbent have six months to review whether they wish to work together in the parish.

At this time you should review the Reader's Working Agreement. If one does not already exist you are expected to draw one up. A copy may be obtained from the Registrar (the Reader should have a copy). It is recommended that you read the regulations with regard to the re-licensing as you may not be familiar with them (see SDAR Rules and Regulations 2007).

If you are both in agreement the Reader's license should be returned to the Registrar for endorsement.

If there is more than one Reader in your parish this must be done with each Reader individually.

Transfers in from another Diocese or parish

Diocesan Transfer

Incumbent

The Incumbent must agree to the Reader transferring into the parish. A Reader is generally expected to worship in a new parish for six months before reaching an agreement to act as a Reader in the parish.

A Working agreement must be drawn up at this time together.

PCC

A motion has to be passed by the PCC agreeing to the Reader's ministry in the parish. This should be proposed in the name of the Vicar, welcoming and supporting the ministry; it needs to mention the Reader by name and also acknowledge both spiritual and financial support.

Reference

This should be requested by the Incumbent to the SDAR Registrar, Warden, or Sub-Warden who will write to the Reader's former Diocese for confirmation that they left their parish in good standing.

Reader's License

If the Reader has a current license they will be issued with a new license from the Diocese of Southwark. Their previous license should be returned their old Diocese for cancellation. If the Reader currently has PTO status then a PTO certificate may be issued by the Area Bishop.

Documentation

The necessary forms for re-licensing must be obtained from the Registrar.

CRB

It is the Diocesan policy that CRB clearance must be obtained before a licence or PTO will be issued.

Licensing

The Reader will be formally welcomed and Licensed to the Diocese of Southwark at the annual licensing service held in Southwark Cathedral each October.

Formalities

Until such time as all necessary documents and procedures are completed they may not exercise any specific Reader ministry in the parish.

Parish Transfer

The conditions stated above in transferring between Dioceses apply to those transferring parishes within the Diocese of Southwark with the exception of the following:

The Registrar will check with the previous parish as to “good standing” when the Reader left the parish and Incumbent to whom they had been licensed.

CRB checks must be re-done.

The Reader must return their original license to the SDAR Registrar of Readers for endorsement.

When all this has been completed, the Reader may be formally welcomed into the parish at a main Sunday service.

As the transfer is within the Diocese the arrangements do not have to be formalised by a Bishop.

Liturgical ministry

Your Reader has been prepared for a liturgical ministry which is mainly, though not exclusively, centred on preaching. Most Readers in fact exercise a regular liturgical ministry even when they are not preaching.

Common Worship provides a model for how a Reader might be used in a Eucharistic setting. In the Common Worship: Main Volume it says:

‘The Deacon’s liturgical ministry provides an appropriate model for the ministry of an assisting Priest, a Reader, or another episcopally authorized minister in a leadership ministry that complements that of the president.’

This ministry is described in this way:

‘the bringing in of the Book of the Gospels, the invitation to confession, the reading of the Gospel, the preaching of the sermon when licensed to do so, a part in the prayers of intercession, the

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preparation of the table and the gifts, a part in the distribution, the ablutions and the dismissal.'

It also says:

'In the absence of a Priest for the first part of the service, a Deacon, Reader or other authorized lay person may lead the entire Gathering and Liturgy of the Word.'

Readers of course are licensed to lead non-Eucharistic worship.

There is no provision in this Diocese for Readers to take services of Communion by Extension.

Funerals

Training

No Reader may undertake the recognised course of training until they have been in active ministry for a minimum of one year after admission to Reader ministry.

Readers are required to undertake the SDAR course of training, details of which may be obtained from the Director of Reader CME. After completion of the course the Reader is expected to undertake practical training with their Incumbent in the parish.

A Reader may only take funerals with the full permission of their Incumbent and must always inform the undertaker and next of kin that they are a Reader who has been trained specifically in the taking of funerals.

Fees

Reader ministry is voluntary. No Reader in the Diocese of Southwark is permitted to accept fees for their work. Expenses may be claimed.

All fees should be made payable to the parish and passed to the parish treasurer for onward payment to the Diocese.

Pastoral, grievances and disciplinary rules

Please refer to the Southwark Diocesan Association of Rules and Regulations (2007) sections 19 and 20.

Southwark Diocese Association of Readers rules and regulations (2007)

A full copy of these are given to each Reader when they are Admitted and Licensed in the Diocese of Southwark. Further copies may be obtained from the Registrar.

The Rules and Regulations contains full details of both the canons and Southwark Diocesan regulations authorised by the Bishop of Southwark.

No Reader in the Diocese of Southwark is permitted to administer Communion by Extension.

General regulations

CRB Clearance

All Readers must complete the Disclosure Procedures which the Diocese conducts through the Criminal Records Bureau. A Reader will be required to renew their disclosure when the Diocese requests it (currently every 5 years). This application will only be relevant to their ministry as Reader. A CRB check carried out for other work, voluntary or paid, will not cover the Reader for their ministry.

Liturgical Dress

The normal dress of Readers is black cassock, surplice and plain blue scarf. The scarf must not be decorated with motifs in any way.

Readers may wear a degree hood for a non-Eucharistic service.

A cassock alb with blue scarf may be worn at Eucharistic services if that is the custom of the parish and the wish of the Incumbent.

Reader status in Southwark

Licensed Reader

A Reader is licensed for three years (renewable) until they reach the age of 70.

Permission to Officiate (PTO)

A Reader is given PTO in the year following their 70th birthday. This is renewed on an annual basis.

Emeritus

Readers are admitted to the office for life and retain the right to attend and vote at the Area and Diocesan meetings. They may be invited to robe and officiate up to a maximum of four times a year but do not exercise any official pastoral duties as an active Reader.

Suspension

Suspension may be imposed under the following conditions:

- Failure to return Licensing or PTO renewal forms by the date required.
- Failure to ensure that the annual fee is paid.
- Failure to complete the required CRB check when requested.
- CRB check returned with unsatisfactory disclosure.
- Where a dispute has arisen under the grievance procedure.
- Or any other circumstance deemed appropriate for suspension by the Bishop, Area Bishop, Warden, Sub-Warden and Registrar in mutual agreement.

The final decision on suspension would be made by the Warden in consultation with appropriate parties.

Continuing Ministerial Education (CME)

The Incumbent should encourage the Reader to attend CME courses.

External Reviews

These are offered to all Readers every three years. The scheme is intended to encourage Readers to explore their ministry with an outside, trained reviewer. If the Reader so wishes a report may be sent to the Incumbent, providing an opportunity for future discussion. Incumbents are asked to encourage their Readers to take part in the external review scheme.

Further assistance

Should you, the Incumbent, require any further assistance in the interests of working with your Reader please do not hesitate to ask.

All contact names, telephone and e-mail details may be found in the Southwark Diocesan Directory.

Revd Canon Andrew Nunn
The Warden of Readers

Trot Lavelle
Sub-Warden

Ray Wheeler
Registrar

August 2008

**SECTION D:
A FRAMEWORK FOR THE USE
OF PARISH BUILDINGS BY
INDEPENDENT CHURCHES**

Section D: A framework for the use of parish buildings by independent churches

A. Context

The Diocese of Southwark recognises the importance of being part of a total Christian presence in South London. It particularly notes the significant and growing role played by independent churches, some with black majority leadership and membership, some with Asian, Latin American and Eastern European origins, and it is committed to working with them wherever appropriate in the furtherance of the Christian mission.

The Diocese appreciates that independent churches need premises in which to base their worship, fellowship and witness, that purchasing premises is often beyond their capability, at least initially, and that therefore parish churches and halls are a resource for these purposes. Parishes should consider making such resources available on clearly stated terms to independent churches that fulfil certain criteria.

B. Some issues

There is a wide variety of practice across churches in the arrangements for the use of Church of England buildings by independent congregations and also a diversity in the nature of the relationships between the local parish church and those who use its premises. There is however a wide recognition on all sides that greater consistency is needed across the Diocese.

This guidance sets out some possibilities and first attempts to clarify some underlying issues.

1. Language

Obviously, all arrangements must be expressed with clarity and technical accuracy; at the same time, it is important to remember that they can express a link between two Christian bodies who should ideally relate to each other as 'host' and 'guest' as well as being in a

hiring situation. This paper uses the language of 'host church' and 'hiring church' to express this relationship.

2. Beliefs

If a hiring church is intending to hold acts of worship and particularly if it wishes to use a consecrated Church of England building, a host church will wish to be assured that the hiring church stands within the mainstream of Trinitarian Christian orthodoxy. Most churches seeking to use Church of England buildings will have a statement of faith and it is suggested that a reference point for testing this statement should be the basis for membership of Churches Together in England (CTE):

'CTE unites in pilgrimage those churches....which, acknowledging God's revelation in Christ, confess the Lord Jesus Christ as God and Saviour according to the scriptures and, in accordance with God's will and in the power of the Holy Spirit, commit themselves:

- to seek a deepening of their communion with Christ and with one another in the Church, which is his body, and
- to fulfil their mission to proclaim the gospel by common witness and service in the world

to the glory of the one God, Father, Son and Holy Spirit.'

A host church would also wish to be assured that its buildings, whether consecrated or not, will at no time be used for teaching that constitutes an explicit attack on the Christian faith of the Church of England.

3. Ecumenism and mission

Local hiring arrangements may be simply that - a transaction between a church that has a building and one that needs one. They can however be seen as an expression of the unity for which Christ prays and a sharing of the gifts and fruit of the Spirit. They can be a means of using a building to reach out to the community in new ways, of developing mutual understanding

between the congregations through joint worship, fellowship and witness and of providing new opportunities for mission in the parish. They can also be a means by which the host church encourages the hiring church to make links with national networks and with local churches together groups.

4. Leadership

The host church Incumbent/Priest-in-Charge and the hiring church lead pastor play a crucial part in initiating and nurturing the arrangements and in promoting understanding and development of the relationship. They have a particular role in ensuring that others involved in the arrangements - wardens, PCC, administrators, caretakers, congregation - appreciate both the general policy expressed in 1, 2 and 3 above and the practical details contained in the agreement. Any changes in leadership in both the host church and the hiring church should result in a new agreement being drawn up and signed.

5. Consultation

The host church Incumbent/Priest-in-Charge should consult with his/her Archdeacon about any new arrangements and for advice on ongoing arrangements. In cases where use of consecrated church buildings is envisaged, detailed legal advice will always be required, and parishes should be aware that this will involve costs.

6. Reviewing

It is good practice for there to be a joint host church/hiring church group, meeting at least twice a year, to review the arrangements to deal with problems and possibilities.

7. Incompatibilities

There may be some circumstances in which the beliefs and practices of the host church and the hiring church are or become incompatible; in these cases, there may be no alternative but to cancel the arrangements, or not to

embark on them in the first place, and to learn from the experience.

C. Possibilities

The arrangements for hosting can vary according to three factors:

1. The nature of the relationship between the hosting and hiring churches

This is categorised below though there are obviously subtleties in the relationships and the possibility of development over time:

- **Hiring only**

In some cases, and often initially, the arrangements are a straightforward use of the building with no intention of any co-operation. The relationship is limited to an agreement on terms of use and finance.

- **Some co-operation**

In other cases, sometimes from the beginning and sometimes as the relationship develops, there is a willingness on the part of both churches to worship and work together occasionally or more regularly.

- **Partnership**

In yet other cases, both churches recognise that they have a shared mission in their community and wish to express that partnership more fully.

- **Covenant**

If it is accepted that both churches, though normally meeting separately, are committed to a continuing partnership, a covenant may be an appropriate way of strengthening the relationship. It could begin with a statement such as

‘In obedience to the call of Christ, we, the minister and people of [the host church] and [the hiring church], who have increasingly shared our Christian life in a variety of ways over recent years, now desire to show

our love for God and for one another by a more formal commitment.'

It could include all the necessary elements for sharing but it would be couched in more dynamic terms eg with specific targets and an agreement to review progress annually. It would be signed and renewed at joint acts of worship.

2. The `status' of the hiring church

The hiring church may be in one of two broad categories:

- A church to which the Sharing of Church Buildings Act (1969) applies

A SOCBA church is one that is named in the list of churches that were party to the original act or have been included since by being gazetted ie published in the London Gazette as wishing to avail themselves of the Act's provisions. A number of black majority churches are in this category including the New Testament Church of God, New Testament Assembly, Shiloh United Church of Christ Apostolic and the Cherubim and Seraphim Council of Churches. The current list is held by Churches Together in England.

Some churches are affiliated to national networks which are included in the act, for example the International Ministerial Council of Great Britain, the Council of African and Afro-Caribbean Churches, the Joint Council of Anglo-Caribbean Churches, The Trans-Atlantic and Pacific Alliance of Churches - the full list is again held by Churches Together in England. Their individual member churches can be regarded as churches to which SOCBA applies.

- Independent, non-affiliated churches

The majority of churches applying to hire buildings are likely to be single congregations, not named as SOCBA churches and not affiliated to any national network.

3. Whether the building to be hired is a consecrated church building or another building such as a hall

If the building to be hired is a consecrated church building, the agreement to use it must be in the form of one of the following:

- Licence under faculty

This is a permission granted by the Chancellor of the Diocese for the use of the church for purposes other than those of the Church of England; the licence will spell out in detail the conditions of such use. In cases where the hiring church is neither a member of Churches Together in England nor belongs to a body that is itself a member, use of the church building for worship by that church can only take place by licence under faculty. The Incumbent/Priest-in-Charge should make contact in the first place with the Diocesan Registry in consultation with the Archdeacon.

- Sharing agreement under the Sharing of Church Buildings Act 1969

If the hiring church is one to which the Sharing of Church Buildings Act applies, it is possible to undertake this formal arrangement. The Sharing Agreement provides a legal contract to enable two partner denominations to have joint use of the building and to apportion that use and the various costs of maintenance. There will normally be a Joint Church Council with representatives from the authorities of the partner denominations and the congregations using the building. Before this way forward is considered, the Incumbent/Priest-in-Charge should consult with the Archdeacon.

Whichever of the above is used, there must also be a hiring agreement - see D below.

If the building to be hired is not consecrated, a hiring agreement is sufficient - again see D below.

For advice on any of the above, contact John Richardson, Ecumenical Project Officer, on 01462 422502 or john@ctslondon.org.uk

Note: The Ecumenical Relations Measure, the new Diocese, Pastoral and Mission measure and leasing have all been considered but are not thought to be appropriate for the arrangements under consideration in this paper.

D. Hiring agreement

This can be in the form of the basic agreement normally used by the host church for rentals to other groups and this may be appropriate in some cases. It can however also be enhanced by a recognition that the host church and the hiring church share a common Christian faith and both are engaged in worship, fellowship and witness. A hiring agreement can only apply to a consecrated church building if it forms part of a licence under faculty; this is not necessary in the case of other parish buildings which do not fall under faculty jurisdiction, such as many church halls.

It can be expected that an agreement will include the following information as of the first importance:

- The names of the host church and hiring church making the agreement
- A description of the beliefs and purposes of both churches, a recognition that they worship and serve God, Father, Son and Holy Spirit, and an undertaking that they will work together wherever possible
- A commitment to use the building together in mutually supportive ways
- A clear statement of which building or parts of a building are covered by the arrangements
- The days and times on which the building will be used
- The purposes for which the building will be used
- The amount to be paid, its frequency, and arrangements for annual review
- Undertakings with regard to insurance, in particular an assurance that the hiring church has public liability cover

Section D: Use of parish buildings by independent churches

of not less than £2 million and contents cover and fire risk assessment

- Undertakings by the guest church on the protection of children and vulnerable adults as follows:

The hiring church is required to ensure that children and vulnerable adults are protected at all times, by taking all reasonable steps to prevent injury, illness, loss or damage occurring, and carries full liability insurance for this. In particular:

- the hiring church shall sign an agreement (Appendix 4) to comply with the host church's policies in safeguarding children and safeguarding adults who may be vulnerable, in the operation of all its activities where children and adults who may be vulnerable are present
 - the hiring church will provide the host church with a copy of its own safeguarding children and safeguarding vulnerable adults policies
 - the hiring church will inform the Parish Safeguarding Officer of the host church of any allegations of abuse or causes of concern relating to any of its membership or leadership, and work in co-operation with the host church in managing such allegations
 - the hiring church will inform the Parish Safeguarding Officer of the church of known offenders seeking to join their church, and work with statutory agencies and the host church in establishing appropriate agreements for the limits on their membership
 - the hiring agreement may be suspended, pending investigation, if the host church is concerned that its policies in safeguarding children and safeguarding adults who may be vulnerable are being violated in any way.
- A statement on treating the fabric with respect
 - A statement about the maximum number of people in the church or hall, both seated and standing

Section D: Use of parish buildings by independent churches

- A statement about fire regulations
- Arrangements for access, leaving and security
- Arrangements for heating and lighting
- Arrangements for storage
- Arrangements for use of the kitchen
- Arrangements for cleaning and the recycling or disposal of rubbish
- Arrangements for reporting and repairing any damage
- Arrangements for notice boards, both within and outside the church
- Undertakings with regard to noise, including respect for neighbours
- Undertakings with regard to fire precautions and evacuation procedures
- Undertakings with regard to smoking, alcohol and drugs
- Undertakings with regard to health and safety regulations
- A statement about the notice to be given by the host church (two months minimum) when it needs to cancel the guest church's use of the premises at a particular time
- The requirement to have a deposit equivalent of two months rental from the hiring church to cover breakages and other damage
- The names of the key contact people for both the host church and the hiring church
- The establishment of a group for the purposes of monitoring the arrangements and proposing developments in the relationship

Section D: Use of parish buildings by independent churches

The agreement should spell out clearly:

- The notice required for the arrangements to be terminated by either the host church or the hiring church
- Procedure for the agreement to be terminated by the host church if the conditions are violated

Templates have been prepared for, respectively, a hiring agreement, an enhanced hiring agreement and provision for child protection. These can be obtained from John Richardson, Ecumenical Project Officer, on 01462 422502 or john@ctslondon.org.uk

E. Final comments

This framework attempts to combine two perspectives; on the one hand, a belief that the independent churches make a welcome contribution to the Christian life of South London and the Southwark Diocese has, in its buildings, a resource to encourage and support that contribution; on the other hand, an acceptance that the Diocese has a clear responsibility to ensure that arrangements for the use of its buildings are in accordance with its legal obligations and good practice, both for the sake of the Diocese itself and of the independent churches that will use its buildings.

Each local setting will have different elements that will need to be dealt with sensitively and not every point made above will be appropriate. It is hoped however that the framework and the various templates will provide a good basis for hospitality and relationships that will strengthen the work of the church in our communities.

John Richardson
Ecumenical Project Officer, Diocese of Southwark
23 June 2009

SECTION E: ANNUAL MINISTERIAL REVIEW

Section E: Annual Ministerial Review

These meetings provide clergy with an opportunity to reflect upon their past year in ministry and to formulate priorities and goals for their ministry in the coming twelve months.

Year 1: Episcopal Parish Visitation

The Area Bishop visits the parish for a full day. He interviews all licensed clergy and meets with the PCC and significant laity. The clergy set long-term goals as well as initial short and medium term targets. They discuss their training and other needs in their present context, and their long-term ministerial calling. The parish outlines plans for the next five years. An agreed report goes to Area and Diocesan Bishop, and a training request to the Continuing Professional Development Officer.

Year 2: Archdeacon's Interview

The Archdeacon meets with the clergy to discuss the short and medium term targets in the context of the particular ministry and the general needs of church and Diocese. Targets are updated. An agreed report goes to the Area and Diocesan Bishop and a training request to the Continuing Professional Development Officer.

Year 3: Lay Interview

A lay interviewer meets with the clergy to discuss the short and long term targets in the context of the secular world in which ministry is carried out. Targets are updated. An agreed report goes to Area and Diocesan Bishop and a training request to the Continuing Professional Development Officer.

Year 4: Archdeacon's Interview

The Archdeacon meets with the clergy to discuss the short and medium term targets in the context of the particular ministry and the general needs of church and Diocese and to prepare the cleric for the next parish visitation. Targets are updated. An agreed report goes to Area and Diocesan Bishop and a training request to the Continuing Professional Development Officer.

SECTION F: FAIRER SHARES

Section F: Fairer Shares

An outline of the way in which Diocesan costs are shared among the parishes.

Principle

The responsibility for paying and housing the clergy and the cost of other support services lies with the Diocesan Board of Finance. The final amount required to be funded by parishes is agreed by the Diocesan Synod at its November meeting when it considers the Budget. Prior to this the Budget will have gone through an exhaustive procedure which looks at every area of expenditure for accuracy and worth. The Diocesan Synod has agreed that the method of apportioning these costs should be based on an “ability to pay”. This is determined using a measure of the potential income of each parish from its membership. This system is called “Fairer Shares” and has been in operation since 1980. It was reviewed and affirmed by Synod in 1992 and 2000.

All parishes contribute a percentage of their agreed potential income apart from those which are being phased-in to their agreed position to allow for the effects of significant growth.

Method of calculating the Potential for Direct Giving

Every three years parishes are reassessed and must complete a questionnaire which asks for details of their congregation. Part of this procedure involves an anonymous gross income survey sent to each member. Two interviewers (members of other parishes from outside the Deanery) then meet with representatives of each parish to discuss the answers and, at this interview, the following are agreed for the parish:

- *Agreed Membership Figure*
- *Personal Income Category (PIC)*

There are 30 PIC categories to reflect the potential income of more affluent and poorer parishes.

Each of these PIC categories is allocated a value based on 4% of the middle average gross income in that band and, when multiplied by the Agreed Membership Figure, gives a “Potential for Direct Giving”.

Section F: Fairer Shares

(Note: The General Synod has recommended that members consider 5% of their net income after tax and National Insurance as the standard of their giving to and through the Church.)

The Budget Percentage

Having arrived at the total Potential Income of the Diocese for assessment purposes and knowing the amount that is required to meet the Diocesan Budget, a simple calculation is done to work out the percentage required from each parish. For example, if the total potential income of the Diocese is £27 million and the amount required from the parishes is £14.5 million, then each parish is asked to contribute 53.7% of its potential for direct giving. Taking into account the numbers and individual incomes the system is deemed to be fair to parishes across the whole financial spectrum.

An example (figures used for illustration purposes only)

(a) Agreed Membership Figure	150
Personal Income Category	3++
(b) Personal Income Category Rate	£825 pa
(c) Potential for Direct Giving	£123,750
(This is also the assessable income)	
(d) Percentage required to meet Diocesan Budget	53.7%

Final Assessment (c x d)	£66,454
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(Should a parish's level of assessment be subject to phasing-in a deduction is made from this calculated figure to limit the annual increase to an agreed percentage - usually between 12% and 18% - above the previous year's figure.)

Appeals

Where the circumstances in a parish have changed significantly it is possible to apply to the Archdeacon for an interim review so that no undue burden is placed on the parish.

Payment

The Fairer Shares assessments on Parishes account for over 77% of the total Diocesan expenditure, much of which is stipend or salary related. It is essential, therefore, that payments are made on a regular monthly basis. The Diocese operates a Direct Debit system whereby a parish can choose to pay by 10 or 12 monthly instalments in consideration of which a discount is offered to reflect the savings in administration. The Diocese also offers a discount for a one-off annual payment in January to reflect the benefit of interest earned. If it is not possible to pay on a regular monthly basis, parishes are asked to pay, regularly, as much as possible and to keep in touch with their Archdeacon if they are likely to fall behind with their payments.

SECTION G: EMPLOYMENT IN PARISHES

Section G: Employment in Parishes

Guidelines on Employing People in Parishes within the Diocese

Introduction

If your parish pays anyone for services rendered, unless the person is an independent self-employed contractor who is able to supply a proper invoice with, where appropriate, a VAT number, then it is probable that an employment relationship exists.

All employees have a contract of employment that forms the basis of the employment relationship, whether or not anything has been written down. In simple terms, an employee agrees to work for an employer in return for wages. A contract is made when the offer of employment is accepted and a number of rights and duties, enforceable through the courts, arise when the employee starts work. The law of contract can be complicated and the purpose of these Guidelines is to give general advice to parishes about employment matters. If complications arise, legal advice may well be needed.

Positive Aspects of Employment in Parishes

Many small employers, including parishes, do not consider that they have sufficient time or resources to devote to employment issues. Together with a large number of willing volunteers, a parish's employees are among its greatest assets and it is worth spending some time and effort over getting the employment relationship right. It is also an opportunity to model good employment practice and uphold important values in the neighbourhood, which enhance the mission of the parish.

Amongst the natural advantages of this type of employment are:

- the close personal relationships that can grow up
- the understanding of the needs and problems of particular employees, which develops from face-to-face contact
- the opportunity to act and react quickly to events
- the opportunity to manage effectively by anticipating employment problems.

The Cost of Getting it Wrong

Unsuitable employees with inadequate training, low morale and motivation, high levels of absence and turnover are expensive in themselves and can absorb vast resources in terms of the time and effort needed to redeem the situation. Dissatisfied employees can take their case to an Employment Tribunal, which can:

- lead to adverse publicity in the neighbourhood and beyond
- absorb the time and energy of many people
- incur considerable costs in preparing and presenting cases

That is to say nothing of the awards such bodies can make if they find any unfairness. None of this is likely to enhance the mission of the parish.

Preparing to Employ Someone

Before beginning the process of employing someone, the parish should carefully prepare a written Job Description and Person Specification describing, respectively, the job on offer and a good applicant. These documents should then be used to prepare any advertisement or recruitment notice and should be referred to frequently in considering applications for the post and interviewing candidates. The Diocese has adopted an *Equal Opportunities Policy* and prepared a *Code of Practice in Employment Matters* which contains much useful advice. Every parish has received copies of both of these documents and further copies can be obtained from the Diocesan Personnel Manager. (Please send an A5 self-addressed, postage paid envelope with your request.) Although parishes are not bound by this policy, the Diocese strongly recommends it to parishes as it believes that equal opportunities reflects major elements of the Gospel and, along with consecutive Secretaries of State for Employment, it also believes that equal opportunities makes good business sense and helps to avoid some of the more common pitfalls.

Recruitment

An advertisement should make it clear where further details of the post can be obtained, to whom applications should be made and the closing date by which applications should be received in order to be considered. All applications should be considered on their merits in

relation to the Job Description and Person Specification. It is never wise to truncate this process and ignore further applications made before the closing date because a seemingly ideal applicant emerges at an early stage. It is always wise to interview the most promising applicant(s). Applicants should always be interviewed by more than one interviewer. It is a requirement of current employment law that all selection or promotion decisions should be free from bias on grounds of gender, colour, national origin, disability or marital status.

You may find it useful to ask for the advice of a trusted parishioner with recent experience of the human resource management or personnel profession; if you have no access to such expertise you should take advice from the Diocesan Personnel Manager, tel 020 7939 9470, or by writing to them at Trinity House.

Income Tax and National Insurance

If you pay anyone any money from parish funds, which is not the direct reimbursement of expenses they have incurred on behalf of the parish, there may be a liability for Income Tax and National Insurance. If the individual fails to make a proper declaration of this income, the Inland Revenue may hold your parish responsible for the tax and contributions due.

A Guide to PAYE for Local Religious Centres is set out in Annex A.

Does an Employee need a Written Contract?

Technically, an employment contract can exist even if nothing is written down, but people discover that writing down the terms can minimise later disagreements. Section 1 of the Employment Rights Act 1996 requires employers to provide all employees with a written statement of certain particulars of employment not later than two months after the beginning of the employment.

This legislation does not require the contract to be in writing but a formally constructed legal contract would fulfil the requirement of the Act provided it dealt specifically with each of the required items. Parishes may obtain a self-help guide to the construction of a *Written Statement of Main Terms and Conditions of Employment* from the Diocesan Personnel Manager. (Please send an A5 self-addressed, postage paid envelope with your request.) A copy of the

skeleton contract used for employees of the Diocese is also available on request and, if it is felt that further advice is required, the Diocesan Personnel Manager may be able to help with tailoring a contract to suit the needs of a particular situation.

What does an Employment Relationship imply?

The terms in the Written Contract or *Statement of Main Terms and Conditions* are known as the express terms of the contract. However, it is unusual for all the terms of an employment contract to be specifically agreed; the courts have agreed that all employment contracts have the following implied terms whether explicitly agreed or not:

- to maintain trust and confidence through co-operation
- to act in good faith towards each other
- to take reasonable care to ensure safety and health in the work place.

Also, when no express term exists, implied terms can become part of the contract through what the parties have actually done, by custom and practice and through the introduction of parish rules by discussion, consultation and explanation.

Statutory Rights of Employees

Over the years, employees have become entitled to a wide range of statutory rights, derived from parliamentary acts or regulations which affect the employment relationship and which cannot be waived.

These include the right:

- not to be discriminated against on grounds of gender, colour, race, nationality, ethnic or national origin, disability, or marital status
- to equal pay with members of the opposite sex, if doing like work or work of equal value
- to an itemised pay statement
- to maternity benefits
- to notice of termination of employment
- to protection from deductions from pay unless authorised
- to pay when laid off

- to redundancy pay
- to a safe system of work
- to statutory sick pay
- to time off for public duties, trade union duties and to look for work if redundant
- to join or belong to a trade union and to take part in its activities
- to protected employment rights on the transfer of a business
- not to be unfairly dismissed
- to written reasons for dismissal
- to a written statement of main terms and conditions of employment.

Can a Contract be Altered?

Most changes to a contract of employment require the consent of both employer and employee. They can be agreed either orally or in writing, but written consent can avoid later disagreement. Contracts can also be changed if the employee works in accordance with the new terms without objecting to the changes or through a 'flexibility clause' which, for example, requires the employee to transfer to a different location with the job.

It is most important that any such changes are discussed and agreed and that the employer can prove that agreement was given. Otherwise the employee may resign and claim compensation for 'constructive dismissal'. If a parish is aware that it is getting into difficulties venturing into this area, it should take advice from the Diocesan Personnel Manager before acting.

How can a Contract be Ended?

A contract can be ended by the employer or the employee, normally by giving the required notice of termination. If the employer fails to give the required notice (either statutory or contractual notice), the employee can make a claim to an Employment Tribunal for damages for what is called 'wrongful dismissal'. It is rarely worth pursuing a claim against an employee who fails to give the appropriate notice.

Fair or Unfair Dismissal

Where the employer gives notice of termination, a dismissal will normally occur. In order that the dismissal should be fair, it must be for one of the following potentially fair reasons:

- a reason connected with the employee's conduct, capability or qualifications
- that the employee was redundant
- that there was some statutory bar to the continuance of the employment.

In treating that reason as the reason for dismissal, the employer must act reasonably in terms of the procedure followed and the appropriateness of the penalty to the conduct. The employee should always be given an opportunity to appeal to some person or group not already involved in the case, for example, a committee of the Parochial Church Council.

When dealing with any disciplinary situation, you are advised to read 'Discipline at Work' the ACAS advisory handbook on discipline, available from ACAS Reader Ltd, PO Box 16, Earl Shilton, Leicester LE9 8ZZ (Tel 01455 852225) priced £2.25 plus postage. The Diocesan Personnel Manager is also available to give advice and should be consulted before dismissing an employee.

And finally, never, never dismiss an employee without a full face-to-face meeting at which the employee has been briefed as to the 'charge' before him/her and is then given an opportunity, with a representative present, where he/she wants one, to give an explanation or say what he/she wishes about the situation, before any disciplinary decision is taken.

Employment Tribunal Claims

Employees with a minimum of one year's continuous service have the right to complain to an Employment Tribunal if they believe that any of their employment rights has been infringed. An Employment Tribunal is an employment jury, presided over by someone with legal qualifications and experience and their intention is to give fairly swift and uncomplicated decisions to resolve disputes. However, in practice, tribunal cases can be a lengthy process creating stress and expense for everyone who is involved.

(Please note that no qualifying period of service is required if an employee wishes to bring a claim under the Sex, Race or Disability Discrimination Acts)

Should your parish find itself involved in proceedings at an Employment Tribunal, it is essential that it obtains appropriate advice. The advice of a solicitor can be costly and may lead to unsustainable fees for representation and advice. The Diocesan Personnel Manager is available to review with any parish the documents they have received from the Tribunal and can give initial advice as to how the case might be handled.

Sometimes, employers fail to realise when an Originating Application for a Tribunal case has actually arrived and this can lead to a failure to submit an appropriate response. On receiving an Originating Application (Form ET1), you should make an initial telephone contact, without delay, with the Diocesan Personnel Manager on 020 7939 9470.

Conclusion

These Guidelines have attempted to deal, in straightforward and non-technical language, with some of the issues that are known to have created problems for parishes in employing people and to suggest ways of overcoming those problems.

However it should be remembered that the vast majority of employment relationships in parishes work effectively, bring satisfaction to the employers and the employees and help in the ongoing mission of the Church. We believe that following the advice contained in these Guidelines will maximise the number of these successful relationships and minimise the incidence of serious problems.

Contacts:

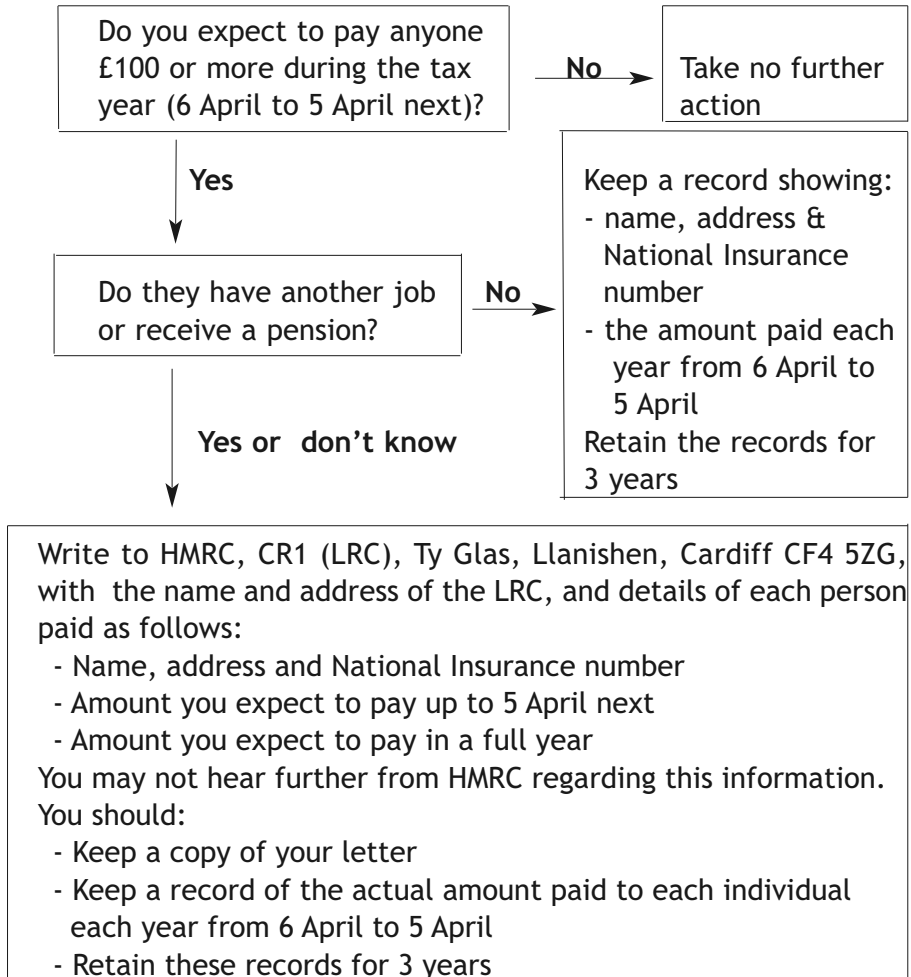
Colin Morton MIPD
Diocesan Personnel Manager
Trinity House
4 Chapel Court
Borough High Street
London. SE1 1HW
Tel: 020 7939 9470.

Annex A

A Guide to PAYE/NIC Operation for Local Religious Centres (LRC) 2008/09

This guide tells you what to do when a payment is made to an employee.

1. **Payments below the tax and National Insurance threshold:**
Earnings Threshold for National Insurance Contributions (NIC) and Income Tax - Pay As You Earn (PAYE):
£116.00 per week or £503.00 per month
 - a. **Go to 3A and 3B below** for action required in respect of employees paid below the threshold
 - b. **Do not make any deductions from the payments** (unless instructed to do so by HMRC resulting from action in 'a' above).
2. **If you will pay anyone at or above the threshold**, telephone the New Employer Helpline on 0845 60 70 143. You will then be provided with information for the operation of PAYE/ NIC.
- 3A **Income Tax: For employees only paid below the threshold**, and for whom you have had no other instructions from the HMRC office, use this flow chart to decide what action to take for each person paid.



3B National Insurance Contributions: For employees paid from £90 to £105.00 weekly or £390 to £453.00 monthly no NIC is payable but you will need to return these amounts to HMRC. Contact your local HMRC office for information on the action required.

- 4. No tax charge will arise in respect of a payment**
- to compensate, without profit, someone who incurs expenses which are allowable as tax deductions, when working for the LRC
 - that reimburses, without profit, the cost of travel to and from the LRC, provided this is the only payment made.

Section G: Employment in Parishes

The cost of travel to and from the LCRC is not an allowable expense, if it is paid along with a fee, etc, for work that is done there. A payment made to compensate for travel to or from the LRC must therefore, be included with other payments when arriving at the amount to report to the tax office, or deduct tax/NIC from, under the PAYE system.

5. Employment status of, for example, church organists

If you

- pay someone a sum at or above the National Insurance Contributions and PAYE threshold

and

- you are in doubt about whether that person is an employee (they may claim to be self employed)

contact the HMRC office for the area where the LRC is located, and ask the Nominated Status Inspector for a decision on whether PAYE is applicable.

Annex B

The Controller
TIDO (LRC)
Ty Glas, Llanishen
Cardiff
CF4 5ZG

Dear Sir

Local Religious Centre (LRC) _____

A payment has been made to the person named below in respect of services provided to my LRC.

In accordance with the instructions contained in the Guide to PAYE Operation for Local Religious Centres (LRC), I am providing the following information:

Name of person to whom payment is made:

Address: _____

National Insurance Number: _____

Total amount expected to be paid before 5 April next: _____

Total amount expected to be paid in full 12 month period: _____

Yours sincerely

Name: _____

Position: _____

Address: _____

Date: _____

**SECTION H:
SAFEGUARDING
CHILDREN AND
VULNERABLE ADULTS**

Section H: Safeguarding Children and Vulnerable Adults

1 Diocesan policies and procedures

This Diocese is committed to establishing an environment where children and young people are nurtured and protected, and where all people, and especially those who may be vulnerable for any reason, are able to worship and pursue their faith journey with encouragement and in safety.

- The Diocese works in accordance with the national legal and procedural framework for safeguarding children and vulnerable adults, and Church of England policy and practice.
- The Diocesan policies and procedures are designed to provide protection for children and young people and vulnerable adults in the Diocese.
- They also provide staff and volunteers with procedures that they should adopt: to create a safe environment for children and young people and vulnerable adults; and in the event that a child or young person or vulnerable adult may be experiencing, or be at risk of, harm.
- They foster and encourage consistency of practice across parishes and in all aspects of Diocesan life in relation to standards for working with children and young people and vulnerable adults, and in supporting their parents and carers.

The policies and procedures are published as a manual, *A Safe Church: Policies, Procedures and Guidelines for Safeguarding Children and Vulnerable Adults and Responding to Domestic Abuse*. Two hard copies were distributed to every parish in March 2009, and parishes are sent updates annually. The manual is also available electronically and can be downloaded from the Diocesan website.

2 How the Diocesan policies, procedures and guidelines should be used

- They apply to all clergy and licensed ministers, all staff employed by the Diocese, and paid or unpaid workers in parishes, and to all parishes in the Diocese.
- All parishes are required to adopt and implement their own policies for Safeguarding Children, Safeguarding Vulnerable Adults and Responding to Domestic Abuse, using the Diocesan templates. They should appoint one or two Parish Safeguarding Officers per church to work with the Incumbent and the PCC to implement the contents of the manual.

3 Diocesan resources

Diocesan safeguarding is resourced by the Diocesan Safeguarding Adviser (DSA), who is full time and based at the Diocesan office. She advises and supports parishes in developing good practice in all activities, and in handling allegations of abuse from or on behalf of young people and vulnerable adults. Her role includes:

- development of Diocesan safeguarding policy and procedures
- providing training in safeguarding for senior staff, clergy, licensed and accredited ministers and parish safeguarding officers, and evaluating and reviewing the training programme
- casework:
 - responding to requests for advice and information to parishes and senior staff where there are concerns about the welfare of a child or vulnerable adult, or about adults who may be a risk to children/vulnerable adults
 - taking the key role in all cases where allegations are made against church officers
 - supporting referrals to Children's Social Care Services and Police in the Diocese and parishes

- attending strategy meetings, conferences etc and collaborating with statutory agencies on specific cases
- networking with statutory agencies

The Diocesan Safeguarding Reference Group promotes practice in management of safeguarding children and vulnerable adults, reviews and advises on Diocesan safeguarding policy and procedures and implications for implementation, and provides a Risk Assessment panel. It is a sub-committee of the Ministry and Training Committee, through which it is accountable to Bishop's Council.

4 The Diocesan policies and procedures include:

- Introduction
- Diocesan policies for:
 - Safeguarding Children
 - Safeguarding Vulnerable Adults
 - Responding to Domestic Abuse
- Responsibilities in the Diocese and the parish
- Procedures and guidelines for keeping safe:
 - Health and safety
 - Identifying and assessing risk
 - Activities
 - Physical contact
 - First aid
 - Holidays and residential trips
 - Holiday clubs and day care
 - Transport
 - Communication with children
 - Taking and publishing photographs (including websites)
 - Drugs and alcohol use
 - Acceptable behaviour
 - Record keeping and personal data
 - Insurance
 - Hirers of church buildings
- Procedures for selection, recruiting and supporting staff
- Procedures for allegations and concerns
- Procedures for care

- Procedures for supervision of offenders and those who pose risk
- Information sheets
- Forms and templates

5 Allegations of abuse

The DSA and the Archdeacon must be informed at the earliest opportunity of all allegations of abuse against church officers (that is, clergy, accredited and licensed ministers, paid and voluntary workers with children, young people and vulnerable adults, and those with ‘representational’ ministries such as churchwarden, organist). The Diocesan procedure for managing allegations (2008) will then be implemented and followed.

The DSA should also be informed of, and is available to advise parishes and liaise with statutory agencies on all concerns for the safety of children young people and vulnerable adults.

6 Supervision of offenders and those who pose risk

The DSA maintains a record of parish agreements set up with known offenders or those who pose risk, to enable them to participate safely in church communities. She works with the Public Protection Unit and with the parish in order to set up and review such agreements.

For further information, please contact the DSA:

Jill Sandham

Tel: W 020 7939 9423; Mob 07982 279713

Email: jill.sandham@southwark.anglican.org

**SECTION I:
REVIEW PROCESS FOR
MINISTERS IN TEAMS AND
OTHERS WITH LIMITED TERM
CONTRACTS**

Section I: Review Process for Ministers in Teams and Others with Limited Term Contracts

These guidelines are designed to ensure that where a person has a limited term contract and would like that contract renewed, that fact is known in good time and the opportunity is taken for an adequate review, so that the option to extend the contract for a further term is treated with the seriousness of a new job, and so that any necessary changes of direction or modifications of job specification can be thought about. The list of those involved is likely to include: Vicars and Rectors in team ministries, whose terms of office are prescribed by the pastoral scheme and whose licence needs to be extended if they are to continue in post, inter-parochial officers or holders of Diocesan posts; and parish Deacons who are likely to be appointed for limited terms. These guidelines should be made known to people coming to the Diocese on appointment, so that all are clear what is expected.

1. A list of persons on limited term appointments should be kept by the Assistant Diocesan Secretary (Pastoral), who will be responsible for notifying the relevant Bishop one year before the expiry of a person's contract. The 'relevant Bishop' means the Area Bishop in the case of Rectors and Vicars in team ministries and parish Deacons, and the Diocesan Bishop for holders of Diocesan posts.
2. The Bishop will appoint (after consultation with the minister concerned) someone to conduct the review. The reviewer should be chosen as someone able to examine the person's ministry up to that point, reflect on the needs of the parish, and consider the most appropriate ministerial development for the future.
3. The invitation should include:
 - a) a request to ensure the completion of a parish questionnaire giving some 'hard facts' about the parish in the last five years (e.g. attendance statistics, parish groups and activities, etc)

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- b) an indication of those people whom it would be relevant for the review to consult (such people as immediate colleagues, church wardens, Board members, and others who would have the right to make a new appointment to the post held if it were vacated)
 - c) the timescale for the reporting process
 - d) the reviewer's comments and recommendations for the Bishop
 - e) an undertaking to defray any expenses incurred in the process
4. Copies of the report should be sent to the Bishop and to the person being reviewed. They should normally meet and discuss any recommendation contained in the report, both as to the possible extension of the contract, the ministerial development of the person being reviewed and any suggested changes in ways of working or objectives.
5. If the recommendation is for extension, and the Bishop is satisfied that this recommendation should be carried out, arrangements will be made for the renewal of the contract or the endorsement of the person's licence for a further term as appropriate. If the recommendation is against extension, discussions will take place about an appropriate time-scale and alternative sphere of ministry.

**SECTION J:
APPRAISAL PROCESS FOR
PROPOSED PARISH
DEVELOPMENT PROJECTS**

Section J: Appraisal process for proposed Parish Development Projects

It's All In The Planning

This paper sets out the procedure that should be followed when parishes have a building development programme and is to ensure that the various Diocesan constituencies are informed and involved.

Background

The Church of England has evolved over many centuries and consequently has ended up with a complicated structure of ownerships and responsibilities. Parishes are still evolving and occasionally come up with ideas affecting the use of buildings, which may, on the face of it, seem simple, but are often surrounded by difficulties. There have been a number of cases recently when parishes have proceeded with building projects and have been held up because there has been insufficient co-ordination between the various parties which have to be involved. This can result in tension as work may have been carried out in good faith, but has to be re-negotiated when the next stage is reached. The five areas that need to be co-ordinated are:

- Title
- Planning Controls
- Building
- Pastoral
- Finance

Recommendation

It is recommended that when a parish contacts any Diocesan officer about a project that will involve development work of any form, they are asked to contact their Archdeacon who will call a "Project Appraisal Meeting". Development work which only involves the church building may not ultimately require an appraisal, but the Archdeacon still needs to know!

The meeting should be convened as soon as the parish is able to describe their vision on paper. It need not be detailed (two sides of A4 would be perfectly sufficient), but it should give an indication of how buildings and people are affected.

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An appraisal meeting will normally involve at least:

The appropriate Archdeacon

Parish Representatives

The Diocesan Surveyor

The Pastoral Secretary

The Archdeacon, in consultation with the parish, will determine if other Officers should also be invited - the Diocesan Stewardship Resources Officer and the Parish Finance Officer. The Archdeacon will ensure that each of these at least receives a short briefing note of the meeting.

The meeting will enable all the Diocesan Officers to consider the implications of the plan. If the project involves more than just the church building, the Diocesan Surveyor will arrange for the item to be placed on the Sites Committee agenda and can advise on planning and other building issues. The Pastoral Secretary will advise on the need for faculties and the involvement of the Diocesan Advisory Committee (DAC) and other interested parties, and on the need for any necessary Pastoral Schemes, including the involvement of Archdeaconry and Diocesan Pastoral Committees.

The parish must ensure that a project co-ordinator is appointed locally, as this is vital for holding the different elements of a project together and through whom all contact will be made in future. The parish will also need to be informed of and aware of the involvement of Diocesan solicitors and/or surveyors and be aware of the cost implications.

The Diocesan Surveyor's office has produced a booklet, "Employing Professional Consultants & Buying & Selling Parish Property" which is essential reading before embarking on a project. Copies of this are available on request from the Property Department at Trinity House. Progress will need to be monitored carefully and we look to the parish to ensure that Diocesan officers receive regular updates. This is especially important when finance has to be put in place at the correct time and also to ensure that relevant 'permissions' have been applied for.

Section J: Appraisal process for proposed Parish Development Projects

These guidelines have been drawn up to ensure that the parish, the Archdeacon and Diocesan Officers can work together to help a project come to a successful conclusion.

Revised Nov 2007
Archdeacons