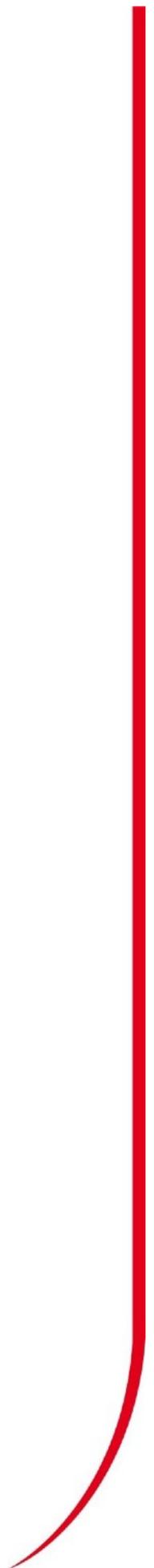


Revision of handbook



The Diocese of  
**Southwark**

# **HANDBOOK FOR RETIRED CLERGY**





## **Foreword by the Bishop of Southwark, The Rt Revd Christopher Chessun**

Day by day the faith of countless Christian people is nurtured, encouraged and informed by the loving ministry and personal example of those who are called to serve as clergy in the Church of God. God's love is mediated to people at key moments in their lives, the Gospel is spoken, taught and lived, and communities are helped to find their identity.

As a Church it is right that we should value highly the commitment of faithful clergy and express our indebtedness to those who, in retirement, exercise a continuing ministry on which at times many parishes depend as well as providing invaluable support for parish clergy not least with cover and support when needed.

I am grateful for the work of the Clergy Retirement Officer and Area Clergy Retirement Officers through which we seek to affirm and care for those who have served the Church for many years.

I therefore welcome the publication of this Handbook, which contains the kind of practical and financial information, conveniently brought together, which will, I trust, be of real use to retired clergy and those making the transition into retirement.

With much appreciation and thanks for our partnership in the Lord's service.

*Christopher Southwark*



<b>Contents</b>	<b>Page(s)</b>
Foreword	2
1. Definition	4
2. Clergy Retirement Officer(s)	4/5
3. Area Deans	6
4. Ministries in the Wider Community	7
5. Safeguarding	7/8
6. Licences and Permission to Officiate	8
7. Occasional Offices	9
8. Fees, Expenses and Other Payments	9/10
9. Pensions	11
10. Retirement Housing	12
11. Retired Clergy Association	12
12. Additional Information	13
■ Holiday Accommodation	
■ Residential Accommodation	
■ Charities	
■ Supported Housing Schemes	
■ Care and Nursing Homes	
■ The Funding of care in private and voluntary homes	



## **2. Definition**

In this Handbook the term “retired clergy” includes those who have retired from full-time stipendiary ministry and are in receipt of a clergy pension and non-stipendiary ministers who no longer hold a licence.

Some retired clergy are in posts that require them to have a licence; these include House-for-Duty posts. Others are given Permission to Officiate (PtO) when they retire. Some retired clergy may no longer hold PtO.

## **3. Clergy Retirement Officers**

The pastoral care of retired clergy is ultimately the responsibility of the Bishop of Southwark. Three Retirement Officers, one for each Episcopal Area, assist the Bishop in meeting these responsibilities. They arrange opportunities for retired clergy to meet locally for study sessions and social gatherings several times a year. They also organise an annual service and lunch for the retired clergy in their specific Episcopal Area.

The Diocesan Retirement Officer is appointed by the Bishop and is responsible to him. The Officer advises individuals seeking help with preparation for their approaching retirement. A regular conference is arranged to assist them to prepare for this challenging change. The Officer is in contact with the Church of England Pensions Board, the Diocesan Office and Charities in the provision of help for those in special need. The Diocesan Officer encourages local pastoral care, through the Area Deans, for retired clergy, their families and dependants.

**The Diocesan Retirement Officer for Southwark:**

The Revd Canon Naomi Whittle  
163 Abbotsbury Road  
Morden  
Surrey SM4 5JS  
Telephone 020 8640 5639  
[n.whittle954@btinternet.com](mailto:n.whittle954@btinternet.com)

**The Assistant Retirement Officers for each Episcopal Area:**

**Croydon**

The Revd Derek Chandler  
The College of St Barnabas  
Blackberry Lane  
Lingfield  
Surrey RH7 6NJ  
Telephone 01342 870260  
Email [chaplain@collegeofstbarnabas.com](mailto:chaplain@collegeofstbarnabas.com)

**Kingston**

The Revd Pamela Stevenson  
7 Robin Hood Close, Mitcham  
Surrey, CR4 1JN  
Telephone: 020 8764 8331  
Email [revpamstevenson@gmail.com](mailto:revpamstevenson@gmail.com)

**Woolwich**

Vacant

The Area Retirement Officers particularly request information about clergy coming into the diocese, any sickness, bereavement, or any problem that may arise with retired clergy. They can be contacted for advice and assistance.



#### 4. Area Deans

Pastoral care of retired clergy is usually the responsibility of the appropriate incumbent of the parish in which the retiree lives. The Retirement Officers work with the parish priest and Area Dean, welcoming retired clergy soon after their arrival in the area and explaining the various networks, contacts and available grants. They also keep in touch with retired clergy, and keep details of their next of kin.

Many retired clergy are willing to offer their expertise in a supporting pastoral ministry. Any ministry in a parish or deanery must first be discussed with the Area Dean and the incumbent of the parish in which the retired cleric wishes to serve in ministry.

The Area Dean may:

- together with the parish priest, meet with the retired cleric to welcome them to the deanery and discuss how they may be able to contribute to its ministry
- share with the Retirement Officer (RO) the pastoral care of retired clergy and their families
- discuss with the RO any matters that warrant diocesan action or contact with the Pensions Board, or on any matter of financial or housing need
- visit retired clergy whose Permission to Officiate (PtO) is about to expire



## 5. Ministries in the Wider Community

Retired clergy may wish to play a useful role in the community where they live. Larger towns and the London Boroughs have Councils of Voluntary Service, Volunteer Bureau, Samaritans and CABs, etc. All of these need volunteers. This is usually unpaid voluntary work, and sometimes expenses are paid. Voluntary work has the double advantage of getting to know the neighbourhood, and enabling the exercise of priestly ministry in a non- ecclesiastical setting. Church associations and groups, (for instance The Children's Society or church schools) often need help. The **Area Dean** may be able to advise. These organisations and institutions have procedures for obtaining a DBS check (see below for the Diocesan procedure).

## 6. Safeguarding

The appropriate criminal record checks with the Disclosure and Barring Service are carried out in every case of exercising ministry within the Diocese. Failure to do so may be a disciplinary offence.

The Diocesan Bishop requires all active retired clergy to undertake appropriate diocesan safeguarding training before granting PtO or a licence. There is also a requirement to attend regular refresher courses as directed by the Bishop.

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

Retired clergy in active ministry must share information with the incumbent of the parish in which they serve and to whom they are accountable. During a vacancy, information on all safeguarding matters is shared with the Area Dean or Archdeacon.

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

In the event of a retired cleric or his or her dependents becoming a vulnerable adult, advice can be sought from the Diocesan Safeguarding Adviser at Trinity House. See the diocesan website for further details.

## **7. Licences and Permission to Officiate**

A retired cleric wishing to exercise any public ministry who does not hold a licence will need to have been granted Permission to Officiate (PtO) by the Diocesan Bishop. PtO or a Licence, is required for any form of public ministry. The cleric may then officiate **when invited to do so** by an incumbent of a parish in the diocese in which the permission has been granted. When invited to conduct public worship, clergy with PtO should ensure worship is consistent with the usual pattern and conduct of worship of that church.

During vacancies and emergencies the Archdeacon, Area Dean or Churchwardens may give the request to conduct public worship. Those inviting retired clergy with PtO to conduct worship should ensure they are given all the information they need in advance.

Care should be taken to respect the ministry of lay people and, where members of the laity are regularly involved in worship, this practice should be encouraged. Care should particularly be taken where Readers are concerned. Retired clergy should not assume that a request to conduct worship automatically involves preaching. Readers who are regularly involved in preaching and the ministry of the Word during the Eucharist should continue this ministry when there is a visiting priest.



## 8. Occasional Offices

Normally it is the incumbent's responsibility to request help from retired clergy for conducting occasional offices (baptisms, weddings and funerals) and their associated visiting. When an individual or funeral director makes a direct approach to a retired cleric, the retired cleric must seek the agreement of the incumbent of the appropriate parish or benefice.

It is the obligation of the parish priest to take all funerals of resident parishioners, those who die in the parish, or those on the electoral roll; this includes all funerals in council and private cemeteries or crematoria. Other clergy (including retired clergy with PtO) take funerals under the jurisdiction of the incumbent of the parish or, in their absence, the Area Dean.

## 9. Fees, Expenses and Other Payments

The Archbishops' Council has issued guidelines on the treatment of fees for retired clergy, which has been endorsed by the Diocese. Only clergy who have Permission to Officiate may take a service, including at crematoria:

- a) All clergy should be fully reimbursed for travel and other expenses
- b) All retired clergy should be reimbursed for motoring costs at the current diocesan mileage rate: Car 45p, Motor cycle 24p, Bike 20p per mile
- c) The scale of remuneration for casual Sunday duty undertaken by a retired stipendiary priest is set annually in the Diocese. For 2022:

1 Sunday service	£41.21
2 Sunday services	£53.55
Full Sunday	£62.83

Full Sunday includes Morning Prayer, Holy Communion, Evening Prayer.

Weekday services should only be arranged in consultation with the relevant Area Dean or Archdeacon. The current fee for a weekday service is £24.68

Locum tenens: 3 days plus Sunday £92.72/ 6 days including Sunday £115.36

- d) Retired stipendiary clergy who have a licence or the Bishop's Permission to Officiate should be offered:
- A casual duty fee for a service in a benefice other than the one where they normally worship
  - A casual duty fee for a service in a benefice where they normally worship, but only when the benefice is vacant
  - A fee equal to two thirds of the incumbent's fee (with the balance of the fee going to the incumbent or Board of Finance, as appropriate) for an occasional office eg wedding or funeral, provided that appropriate pastoral visiting before and after the office is undertaken by the retired clergy person.

Information on fees and expenses is published annually in the Diocesan Pay and Conditions of Service booklet, available from an incumbent or the Diocesan Office or the Diocesan Retirement Officer.

It is important to remember that all fees should be submitted in the tax returns of the retired clergy. Mileage rates are published annually by the Diocesan Office. Clergy with supplementary church pensions are required to declare any income to the Pensions Board; the supplementary pensions may be reduced accordingly.



## 10. Assistance from the Church of England Pensions Board (CEPB)

The Board is a registered charity in addition to its role as trustee and administrator of several pension schemes. It is able to offer additional help to retired members of the clergy and their dependants in certain circumstances.

**Supplementary Grants for Retired Scheme Members:** If your pensionable service is not sufficient for you to be entitled to a full pension, you may be eligible for a supplementary grant. The definition of full pension will depend on when you joined the scheme and your pensionable service.

In assessing your case, the Board will take into account your gross income from all sources, including State and any other pensions, and your capital. The total gross income and capital of your spouse or civil partner will also be considered if you are married or in a civil partnership.

You should note that:

- The Board's help is discretionary; there is no guarantee on the amount of any supplementary grant agreed.
- Grants cannot be provided before the age of 65.
- All grants are subject to regular review and the Board should be informed of any change of financial circumstances.
- Supplementary grants are taxable as earned income.
- Grants are used to supplement gross income and are not available for help with one off expenses that may be incurred.

**Augmentation Grants:** An augmentation grant may be available for the surviving spouse or civil partner of a member if that person's income is below an agreed level.

You should note that:

- The Board's help is discretionary and there is no guarantee as to the amount of any augmentation grant agreed.
- All grants are subject to regular review and the Board should be informed of any change of financial circumstances.
- Augmentation grants are not currently liable to tax.

A useful publication '**2022 Clergy Booklet version1.0**' is available to download from the CEPB website or from the Diocesan Retirement Officer

The Pensions Department can be contacted at

Church of England Pensions Board

PO Box 2026

Pershore

WR10 9BW

Direct dial telephone: 020 7898 1083

[pensions@churchofengland.org](mailto:pensions@churchofengland.org)

## **11. Retirement Housing**

The Church of England Pensions Board (CEPB) is a registered charity and operates the Church's Housing Assistance for the Retired Ministry (CHARM). The object of the Scheme is to assist beneficiaries vacating tied housing with retirement accommodation. The booklet '**Your Guide to Retirement Housing**' can be downloaded from the website and is available from the Diocesan Retirement Officer.

Housing options include:

Shared ownership scheme

Rental scheme

Supported housing scheme

For shared ownership or rental properties see the website

[www.churchofengland.org/housing](http://www.churchofengland.org/housing) CEPB will help in planning up to five years before your anticipated retirement date. If you would like to know how the Scheme may fit your particular circumstances, the staff at the Board will answer any questions you may have, or give more detailed information.

Telephone: 020 7898 1824 (Housing Helpline) Email:

[housingservices@churchofengland.org](mailto:housingservices@churchofengland.org)

Postal Address: Housing Department

Church of England Pensions Board

PO Box 2026, Pershore WR10 9BW



## 12. Retired Clergy Association

The Association, recognised by the Church of England, seeks to represent the interests of retired clergy. It produces a newsletter. All retired stipendiary clergy whose last post was served in the Diocese of Southwark are given the £50 life membership fee as part of their retirement package. Non stipendiary clergy are now eligible for the life membership fee on attaining the age of 70 years. Application forms are available from the secretary and treasurer The Revd Malcolm Liles, 473 City Road, Sheffield S2 1GF. Email [secretary@rcacoe.org](mailto:secretary@rcacoe.org) Telephone 01144 537964 Members of the RCA may apply for bursaries to help with study or research. The Association also keeps members up to date with current developments and procedures through the publication of occasional papers written by theologians and others.

**And in addition:**

### ***HOLIDAY ACCOMMODATION***

Some charities will help with holidays. The **Church Army** has some provision.

**Gladstone's Library** (formerly St. Deiniol's Residential Library) is glad to welcome retired clergy for holiday and refreshment at special rates.

Gladstone's Library  
Church Lane  
Hawarden  
Flintshire  
CH5 3DF

Telephone: 01244 532350  
Email: [enquiries@gladlib.org](mailto:enquiries@gladlib.org)

Other places that offer holidays include retreat and conference houses are listed in the *Church of England Yearbook*.

## **RESIDENTIAL ACCOMMODATION**

### **The College of St. Barnabas**

Blackberry Lane

Lingfield

Surrey RH7 6NJ

Telephone: 01342 870260

Email: [chaplain@collegeofstbarnabas.com](mailto:chaplain@collegeofstbarnabas.com)

Website: [www.st-barnabas.org.uk](http://www.st-barnabas.org.uk)

The College offers retirement accommodation in Cloister Flats. Residents are encouraged to lead active, independent lives. There is also a Care Wing, which provides medical help.

Running costs are met mainly by Residents' fees and by investment income. Applications are welcome from retired members of the Clergy of the Church of England or their dependants. For further information apply to the Chaplain, Revd Derek Chandler.

### **Morden College**

19, St. Germans Place

Blackheath

London, SE3 0PW

Telephone: 020 8463 8330

Email: [enquiries@mordencollege.org](mailto:enquiries@mordencollege.org)

Apply to The Warden for details

### **Bromley and Sheppard's Colleges**

London Road

Bromley

BR1 1PE

Telephone: 020 8460 4712

For more information contact The Chaplain, Chaplain's House, Bromley College

Email: [bromleyshppardscolleges@btconnect.com](mailto:bromleyshppardscolleges@btconnect.com)

The Colleges are in the centre of Bromley and offer accommodation to retired clergy of the Church of England.

## **CHARITIES and SUPPORTED HOUSING SCHEMES**

Several National Charities support retired clergy, their partners and dependents. You can make direct contact with them; their websites are useful. The Retirement Officer offers advice and support. All National Charities operate a 'network' with the Pensions Board so that applications for support can be addressed to the appropriate possible fund or provider. A brief list of Charities follows, with more information on their websites; others are listed in the Church of England Year Book and other church publications.

### **Clergy Support Trust**

*Originally Sons and Friends of the clergy*

1, Dean Trench Street Westminster, SW1P 3HB

Telephone: 0800 389 5192      Email [help@clergysupport.org.uk](mailto:help@clergysupport.org.uk)

The charity gives financial help to clergy of the Anglican Communion who work in Great Britain, Ireland and the Diocese in Europe. This includes clergy who hold PtO. It also assists clergy in retirement, and their widows/widowers, their separated or divorced spouses/civil partners and their dependent children under the age of 25.

All correspondence with the charity relating to grants is treated in strictest confidence, and third parties will not be approached without the applicant's permission. Eligible households can apply every 12 months.

### **The Foundation of Edward Storey (for women in need)**

The Clerk to the Trustees Mount

Pleasant Cambridge, CB3 0BZ

Telephone: 01223 364405      Email [info@edwardastorey.org.uk](mailto:info@edwardastorey.org.uk)

The Foundation provides sheltered accommodation for widows or ex-wives of Church of England clergy, retired clergywomen, missionaries, or other women with a close professional connection with the Church of England. It can provide grants or loans for the benefit of residents, or others, who are in hardship or distress, provided they are closely connected to the Clergy of the Church of England.

The Foundation offers a certain number of grants and loans each year. These can be awarded to financially unsupported women (for instance single, separated, divorced, widowed) who are widows or ex-wives of Church of England clergy, retired clergywomen, missionaries or other women with a close professional connection

with the Church of England. Each applicant is considered individually.

### **Frances Ashton Charity**

Telephone: 07775 717606 Email: [francesashton@hotmail.co.uk](mailto:francesashton@hotmail.co.uk)

Frances Ashton Charity has been helping clergy since 1747. It provides one off grants of variable amounts for needy clergy of the Church of England, serving or retired, men and women, and the widows or widowers of such clergy in cases where there is an exception or an urgent need.

Generally, the Trustees give priority to retired clergy and older widows. Although there is no requirement for someone to countersign an application it is helpful for it to be accompanied by a Diocesan recommendation, for example, from an Archdeacon or Clergy Retirement Officer.

### **St. Andrew's Society for Ladies in Need**

The Secretary

St Andrew's Society

20, Denmark Gardens

Holbrook

Ipswich, IP9 2BG

Telephone: 01473 327408 Email: [mpope1@btinternet.com](mailto:mpope1@btinternet.com)

The Society gives regular grants, payable quarterly, to eligible ladies to help towards day-to-day living expenses. They give one off grants to help towards emergencies such as household repairs, heating costs, eye and dental costs. Some beneficiaries are in nursing homes where a regular grant can assist with a shortfall in fees. The Trustees are particularly concerned with helping ladies who are struggling to keep their independence in their own home.

Application

forms are available from the Secretary.

### **Methodist Housing Association (MHA)**

Telephone: 01332 296200 Email: [enquiries@mha.org](mailto:enquiries@mha.org)

## **CARE AND NURSING HOMES**

The Pensions Board administers a number of retirement homes for clergy and dependents. Holidays and respite care may be available at these homes. There are usually waiting lists for the homes, and it is wise to contact the Pensions Board as early as possible if a need for such accommodation is likely to arise.

In some cases retired clergy may need other residential or nursing accommodation. It is advisable to go through the normal channels by way of your GP, or Social Services and to secure their assessment of need. These avenues *must* be explored first and financial help be sought from them. Where there is an unavoidable shortfall financially, the Pensions Board and the charities may be able to assist. The Diocese, through the Diocesan Retirement Officer, is available to talk over your problem in confidence and offer advice. Other help, for instance, with home nursing and various forms of care, may be available from various charities and local support groups.

### **Care Homes:**

The Foundation of Edward Storey (see above)

Methodist Housing Association (see above)

### **The Funding of Care in private and voluntary homes**

Under the care of the community procedures anyone who is concerned about their health or housing can ask to be assessed by the Social Services Department of their Local Authority. This also applies to those who wish to move to residential and nursing care or those who are being discharged from hospital. The aim is to identify the appropriate level of care which is required and to make practical suggestions on how this can be provided. Written details of the report will be made available and the assessment will include the views of the GP, Consultant and the applicant. A care plan is then prepared to ensure that the level of care identified can be provided. If a move is thought best the Social Worker will suggest local homes within the area where the level of care can be provided.

Should the applicant be unable to meet the proposed full cost, a financial assessment is undertaken and an offer of funding is made from the Social Services where necessary. The care manager will then enter into a contract with the home in order that the home will provide the agreed level of care for the proposed level of funding. Regular monitoring will then take place of the care provided. If an applicant's income is relatively low they may be asked to claim Income Support.

In certain circumstances, the level of the offer of state help may be insufficient to meet the full cost of care. It is then most important to insist on negotiations at that point, and where a third party is expected to contribute towards any shortfall that they too are involved. **This should take place before any move is made.**

The Church of England Pensions Board is able to assist its beneficiaries with the cost of care in private and voluntary homes where full state benefits have been claimed and where the capital resources have diminished.

Should you wish to make a claim to the Church of England Pensions Board for assistance please contact the office (see page 11) so that the relevant forms can be issued. They will gladly offer any assistance possible to ensure that the correct amount of state support is assessed. The Board's staff will do all they can to assist.

Additional advice may be obtained through:

Age UK Advice line 0800 678 1602 (lines open 8.00am – 7.00pm 365 days a year)

[www.ageuk.org.uk](http://www.ageuk.org.uk)

Elderly Accommodation Counsel (EAC) is a national charity helping older people make informed choices about meeting their housing and care needs.

See EAC website also [www.housingcare.org](http://www.housingcare.org)

For further advice or other details please contact the Diocesan Retirement Officer.



















