

## Early Retirement Through Ill-Health

### Basic Information

<b>Contact Name and Details</b>	Nick Moore, Head of Support Services <a href="mailto:mooren@methodistchurch.org.uk">mooren@methodistchurch.org.uk</a> Tony Tidey <a href="mailto:tideyt@methodistchurch.org.uk">tideyt@methodistchurch.org.uk</a>
<b>Status of Paper</b>	Final
<b>Action Required</b>	Decision
<b>Draft Resolution</b>	The Council adopts the recommendations in the report and directs that appropriate amendments to Standing orders are brought to the Conference.
<b>Alternative Options to Consider, if Any</b>	None

### Summary of Content

<b>Subject and Aims</b>	A report commissioned by the General Secretary was presented to the Council in February as part of the MMPS Benefits Review. This paper brings to the Council a series of recommendations arising from that report.
<b>Main Points</b>	<ul style="list-style-type: none"> <li>• Amendments to Standing Orders are proposed that will enable the Medical Committee to arrange for ministers that are suffering prolonged bouts of ill-health to be referred to medical practitioners</li> <li>• Terms of reference of the Medical Committee to be reviewed</li> <li>• An appropriate group to be formed to implement these proposals once adopted</li> </ul>
<b>Background Context and Relevant Documents (with function)</b>	MC/10/19 Appendix 2
<b>Consultations</b>	Original report prepared by a working group that included representatives of the Medical Committee, MMPS and MMHS

### Summary of Impact

<b>Standing Orders</b>	SO 790
<b>Faith and Order</b>	N/a
<b>Financial</b>	Initial costs will be met by the Medical Committee. In extreme cases the proposed measure will reduce the current call on the Methodist Church Fund in paying the stipends and other costs of long-term sick ministers
<b>Personnel</b>	N/a
<b>Legal</b>	N/a
<b>Wider Connexional</b>	See financial
<b>External (e.g. ecumenical)</b>	N/a
<b>Risk</b>	None identified

## Early Retirement Through Ill-Health

### Working Party on Early Retirement of Presbyters and Deacons due to ill health

1. At its meeting of 1-2 February 2010 the Council considered report MC/10/19 'Methodist Ministers' Pension Scheme (MMPS) Benefits Review'. Attached as appendix 2 was a report from the Working Party on Early Retirement of Presbyters and Deacons due to ill health. This report set out the outcomes from a review of issues relating to ministerial ill health, and contained a number of recommendations which were not considered by Council at this meeting, since they were not explicitly linked to the MMPS review. The full report is available on the website and the recommendations are now set out below for the Council's consideration:

2. **Recommendations:**

- 2.1 That Standing Order 790 be amended to require Ministers to be assessed, at the discretion of the District Chair, Warden of the Diaconal Order or the Secretary of Conference, by a Medical Advisor appointed by the Medical Committee and at the Committee's cost, in circumstances of ill health. (As a guideline, this could be appropriate after an absence on grounds of sickness of three months or more);
- 2.2 That a Standing Order be drafted which would require a Minister to abide by the Medical Committee's decision concerning a recommendation relating to ill health retirement, following a referral to the Medical Committee (taking into account an appeals process which would include an independent medical opinion, where appropriate);
- 2.3 That a Standing Order be drafted concerning the establishment and maintenance of medical records for Ministers, to link with the existing decision of Conference concerning initial, exploratory work on Personnel Files for Ministers;
- 2.4 That a good practice guide be developed in conjunction with the Handbook for Presbyters and Deacons, to assist District Chairs and Superintendents, and the Warden of the Diaconal Order, on the management of ill health for Ministers, so that appropriate and early intervention may be offered as part of the overall approach to pastoral care;
- 2.5 That for ministers who retire through ill-health this matter should be kept under review, in accordance with Standing Order 793, which sets out the mechanism for a return to active ministry, and the rules of the MMPS;
- 2.6 That the Terms of Reference of the Medical Committee be reviewed, in order to clarify its constitution, role and responsibilities;
- 2.7 That personal files with medical information should be established, on the basis that it would positively assist with the effective stationing of Ministers in the light of any disabilities or impairments they had;
- 2.8 That a small group be convened to develop a clear, accountable and agreed procedure for the management of ill health matters for Ministers, allied with the proposed amendments referred to above in Standing Orders.

3. An indicative amendment to Standing Order 790 to effect the above and the consequence of the Methodist Ministers' Pension Scheme Review of Benefits update (which can be found elsewhere in the Agenda of this Council) is set out below.

## Section 79 Supernumeraries

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Clauses 23(i) and 23A(i) of the Deed of Union (Book II, Part 1) require the Conference by Standing Order to make provisions for ministers and deacons to become supernumerary.

This Section applies to ministers and deacons in full connexion. As to other ministers and deacons see S.O. 734.

**790 Application to become Supernumerary.** (1) Any minister or deacon in full connexion ~~who has or who, at or before the end of the current connexional year, will have:~~

- ~~(i) ——— travelled for forty years, or, in the case of a deacon, served for forty years from the date of entry as defined in Standing Order 800; or~~
- ~~(ii) ——— paid contributions to the Methodist Ministers' Pension Scheme for forty years; or~~
- ~~(iii) ——— [deleted]~~
- ~~(iv) ——— reached the age of 64; or~~
- ~~(v) ——— travelled for ten years or, in the case of a deacon, served for ten years from the date of entry as defined in Standing Order 800 and, in either case, has reached the age of 60~~

may seek permission to become a supernumerary **under the terms of Standing Order 791(1)** with effect from the end of ~~the current connexional~~ that year. **Except where permission is sought to become a supernumerary on the grounds of ill health or compassion under clause (2) or (3) of this Standing Order, the date of becoming supernumerary should coincide with the expected end or curtailment of the minister's or deacon's current appointment as agreed in a previous connexional year.** Requests by ministers shall be submitted through the Ministerial Session of the Synod or if not a member of a Synod through the Secretary of the Conference, and by deacons through the Convocation of the Methodist Diaconal Order.

Permission to become a supernumerary is given by the Conference, or, in cases of urgency on the ground of ill health, the President (Deed of Union, cl. 23(i) or 23A(i), Book II, Part 1).

**(1A) The amount of any pension that might be received by a minister or deacon from the Methodist Ministers' Pension Scheme and the age at which it might be received are governed by the Rules of that Scheme.**

~~As to calculation of years of travel see S.O. 800.~~

As to pensions see S.O. 805. The Methodist Ministers' Pension Scheme is an occupational pension scheme approved by the Inland Revenue under Chapter 1 Part XIV of the Income and Corporation Taxes Act 1988 and administered, in accordance with the Scheme Rules, by a corporate trustee, The Methodist Ministers' Pension Trust Ltd., appointed by the Conference.

~~Permission to become a supernumerary is given by the Conference, or, in cases of urgency on the ground of ill health, the President (Deed of Union, cl. 23(i) or 23A(i), Book II, Part 1).~~

(2) (a) Any minister or deacon seeking to become a supernumerary on the grounds of ill health who is not within the scope of clause (1) above shall, after giving notice to his or her Chair (and, in the case of a deacon, also to the Warden of the Methodist Diaconal Order), apply to the relevant member of the Connexional Team who shall refer the application to the chair of the medical committee of the Methodist Council. **The chair of the medical committee** ~~who~~ shall arrange for a medical report, **and where the committee judges it appropriate, for the applicant to be referred to an independent occupational health physician for assessment.** All expenses in connection with such a medical report **and assessment** shall be borne by the medical committee.

**(b) In cases of prolonged or repeated absence through ill health, the relevant Chair or the Warden of the Methodist Diaconal Order or the Secretary of the Conference may require a minister or deacon to undergo an assessment by a medical advisor or**

**occupational health physician. All expenses in connection with such a medical assessment and report shall be borne by the medical committee.**

**(c) All records, reports and assessments received under the terms of sub-clauses (a) and (b) shall be held in connexional files that are confidential to the members of the medical committee and to the Secretary of the Conference and his or her delegated representatives.**

~~(b)~~ **(d)** Unless sub-clause ~~(ee)~~ below applies the medical committee shall recommend to the Ministerial Session of the Conference or the Conference Diaconal Committee, as the case may be, whether the person concerned should be permitted to become a supernumerary on medical grounds. **The person concerned shall abide by the decision of the medical committee, except that where the person concerned wishes to appeal against the recommendation of the committee, independent medical opinion shall be sought and the appeal heard by people who have not previously adjudicated in the case. The recommendation of those hearing the appeal shall be presented to the Ministerial Session of the Conference or the Conference Diaconal Committee, as the case may be, together with the original recommendation of the medical committee.**

For the Conference Diaconal Committee see cl. 25A of the Deed of Union and Section 18.

~~(e)~~ **(e)** If the medical committee considers that the person concerned should as a matter of urgency be permitted to become a supernumerary before the next meeting of the Conference, and he or she so desires, the committee shall so recommend to the President.

~~(ef)~~ Where the person concerned desires to receive an enhanced pension from the Methodist Ministers' Pension Scheme a report shall be made available by the medical committee to the Trustee of the scheme.

The level of pension, if any, to be paid in such cases is determined by the rules of the Methodist Ministers' Pension Scheme (see note to cl. (1) above).

As to ~~(ee)~~, the President has power to grant permission on the ground of ill health in cases of urgency (Deed of Union, cl.23(i) or 23A(i), Book II, Part 1).

(3) A minister or deacon who is not within the scope of clause (1) or (2) above may apply for permission to become a supernumerary on compassionate grounds. Any such person shall, after giving notice to the Chair (and, in the case of a deacon, also to the Warden), apply to the Stationing Advisory Committee, stating the grounds on which the application is made. The committee shall make a recommendation to the Stationing Committee which shall in turn make a recommendation to the Ministerial Session of the Conference or the Conference Diaconal Committee, as the case may be.

The level of pension, if any, to be paid in such cases is determined by the rules of the Methodist Ministers' Pension Scheme (see note to cl. (1) above).

(4) A minister or deacon who is permitted to serve in accordance with heads (iv) to (vi) of Standing Order 780 in a chaplaincy or an appointment not within the control of the Church or a mission partnership where the length and timing of appointments is not co-terminous with the connexional year and who satisfies the criteria for becoming a supernumerary in heads (i), (ii), (iv), or (v) of clause (1) above may apply to the President to be designated as without appointment until the end of the connexional year. In determining the case the President may ask the Stationing Advisory Committee to make a recommendation about the circumstances and the financial implications.

(5) All recommendations under clauses (2), (3) and (4) above made with respect to ministers prior to the Ministerial Session of the Synod shall be reported to it. Those made with respect to deacons prior to the Convocation shall be reported to that body.

(6) The Agenda of the Conference shall include a list of the names of ministers and deacons asking permission to become supernumeraries, showing also the number of years each has travelled.

See note to S.O. 364(1).