

## 34. Connexional Allowances Committee – care of supernumerary ministers and their dependants

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<b>Resolutions</b>	34/1. The Conference receives the Report. 34/2. The Conference adopts the recommendations contained in section 6. 34/3. The Conference adopts the Report as its further reply to Memorial M9 (2016).

### Summary of content

<b>Subject and aims</b>	Response to Memorial 2016/M9 and Notice of Motion 2017/207, as directed by the Conference, on the care of supernumerary ministers and their dependants.
<b>Main point</b>	<ol style="list-style-type: none"> <li>1. The origins of the report and the process followed.</li> <li>2. Important factors and background information.</li> <li>3. Understanding the meaning of the covenant relationship.</li> <li>4. Understanding the meaning of marriage vows.</li> <li>5. MHA's position</li> <li>6. Ways forward to address the issues raised.</li> </ol>
<b>Background context and relevant documents</b>	Memorial 2016/M9 (see Appendix 2) and Notice of Motion 2017/207 (see Appendix 3).  References in the CAC's reports to the Conferences of 2015 and 2016.
<b>Consultations</b>	Methodist Ministers' Housing Society, the Methodist Ministers' Pension Scheme, the Conference Office, the Wellbeing Officer, MHA and TMCP.

### Summary of impact

<b>Financial</b>	Potential modest impact on the Fund for the Support of Presbyters and Deacons (FSPD) and the Aspinall Robinson Trust (for deacons).
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### 1. Origins and process

- 1.1 The Connexional Allowances Committee (CAC) has become increasingly aware of the financial, housing and general welfare needs of supernumerary ministers (and their spouses), widows and widowers as it deals with a wide variety of requests for support from the funds at its disposal, mainly the Fund for the Support of Presbyters and Deacons (FSPD)<sup>1</sup>. Whilst the FSPD's objects have been widened in recent years to give assistance to active and student ministers, its original purpose, as evident from its earlier designation – the Auxiliary Fund of the Ministers' Retirement Fund – was to support ministers and their dependants in retirement.
- 1.2 In its reports to the 2015<sup>2</sup> and 2016<sup>3</sup> Conferences, the Committee recognised that, in addressing the holistic nature of the needs, it would be helpful to encourage some joined-up thinking between the various bodies with related responsibilities and began conversations with the Methodist Ministers' Housing Society (MMHS)<sup>4</sup>.
- 1.3 The Conference of 2016<sup>5</sup> adopted the reply to a Memorial (M9) entitled 'Support for ministers or their partners requiring care' which directed the Connexional Allowances Committee (CAC) to explore the matters raised in the Memorial with a group including the MMHS, the Methodist Ministers' Pension Scheme (MMPS) and the Conference Office, and to report back to the 2018 Conference: see Appendix 2.
- 1.4 Whilst the Committee was pursuing its work, the 2017<sup>6</sup> Conference adopted a Notice of Motion (number 207) entitled 'Supernumeraries and care costs' which further developed Memorial 2016/M9 (which came from the same source) and specifically 'strongly encouraged' MHA to engage with the Committee to 'enable financial provision for married couples to remain together': see Appendix 3.
- 1.5 The group<sup>7</sup> comprising representatives from the CAC, MMHS, MMPS and the Conference Office co-opted the Connexional Wellbeing Officer and met twice to

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1 It is noted that there is a separate fund, the Aspinall Robinson Trust, which may be used to offer financial support to deacons and their dependants. Its objects mirror those of the FSPD and like the FSPD, it is managed by the Connexional Allowances Committee. Throughout this report, wherever mention is made of the FSPD, it is taken to include the provision of the Aspinall Robinson Trust for deacons.

2 2015 Agenda section 46, page 446, paragraph 3.11.

3 2016 Agenda section 14, page 106, paragraph 3.8.

4 It is noted that SO 364(1) specifically mentions that the FSPD may make grants to MMHS.

5 2016 Agenda Memorials booklet page 13.

6 Notice of Motion 2017/207.

7 The group comprised John Bell (CAC), Mairi Johnstone and Sharon Green (MMHS), Meena Tooray (MMPS), the Revd Dr Jonathan Hustler (Conference Office) and Linda Robotham (Wellbeing Officer).

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discuss the issues raised by the Memorial and Notice of Motion and engaged in other face-to-face and email exchanges in order to prepare its response. Further conversations and exchanges were held between the CAC and the leadership of MHA. The Committee (the CAC) presents this report on behalf of all the parties involved in the work.

- 1.6 Contact was also made with the Trustees for Methodist Church Purposes (TMCP), which holds a variety of trusts for many Methodist purposes, some of which relate to this subject. The Chair of the Committee also happens to be a member of the TMCP Board and facilitated the conversations.
- 1.7 As mentioned above, it is evident that the Memorial and the Notice of Motion arose from the same source and were significantly influenced by a particular set of circumstances. The Committee appreciates the pastoral support given, the proper concerns which are reflected and welcomes the opportunity to respond. However, there is no indication, either in the Memorial or from calls on the funds available to the Committee, that the circumstances are widespread or that the Church faces a crisis of financing care for supernumeraries.

### **2. Important factors and general background information**

- 2.1 In the UK in general, there is increasing life expectancy and, in older age, dependency which contributes to special housing needs and increasing expense. Ministers and their spouses are no exception. The days when many people died shortly after retirement are long gone and have crucially driven the state retirement age upwards. Thus, the normal age at which the state pension may be claimed is increasing, thereby also influencing the age at which ministers may choose to retire.
- 2.2 From various records held at Methodist Church House (and it is recognised that these numbers change) it is known that there are 1,930 supernumerary ministers and 720 widows or widowers, giving a total of 2,650. Of these it is known that about 780 occupy MMHS properties, estimated that 1,100 or so occupy their own homes, and that about 750 live in rented accommodation, residential homes, or with family members or friends<sup>8</sup>.
- 2.3 The terms and conditions of the MMPS are well defined and are the responsibility of the MMPS Board of Trustees. MMPS reports to the Conference every year and from time to time brings recommendations to change the contribution rates and benefits.

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8 There is a small but increasing number of ministers married to each other, or in partnership, which reduces the overall demand for retirement housing.

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At present the Church contributes 26.9% and the minister 9.3%<sup>9</sup> of standard stipend to the scheme: where N is the number of years' service (maximum of 40) pensions are based on N/80ths of standard stipend (until 2010, it was N/70ths), irrespective of whether, when active, the minister was in receipt of an allowance above stipend. Widows and widowers receive 50% of the pension.

- 2.4 It is noted that, whilst a minister's pension is based on a percentage of standard stipend at the point of becoming supernumerary, the stipend level is predicated on the tax-free provision of a manse during active ministry, and the value of that element of total remuneration is not reflected in the minister's pension. The Committee is aware, from previous studies and reviews, that some ministers would rather be responsible for owning their own homes and be paid a higher stipend, but such a move would have huge consequences for the finances of the Church and MMPS.
- 2.5 Some ministers have accrued pensions from previous employment prior to their entry into ministry but many have not. Some have spouses who are employed, contribute to a scheme and receive a pension in retirement. Some have accumulated income from other sources. All in all, it is evident that financial circumstances of ministers at the point of becoming supernumerary, and their need for housing, to which we now turn, vary widely.
- 2.6 Many ministers are able to make provision for their retirement home whilst they are in active ministry. It is noted that, in recent years, conflicting advice has been offered to student ministers at the start of training who own their home (albeit usually with a mortgage), whether to retain and let it or to sell it. In a few cases the former choice has led to difficult financial circumstances when long-term tenants did not materialise. Those who do retain a property do not necessarily retire there but they do have the financial means to purchase another property when the time comes.
- 2.7 MMHS was established to provide homes, on becoming supernumerary, for ministers and their spouses and widows and widowers who were not in a position to purchase their own. A stock of houses has been built up over the years (now 900+, but fluid as properties are bought and sold to meet emerging needs) across the UK. In 2017/2018, the maximum purchase price for a newly-acquired property is £220,000 and this figure is reviewed from time to time to reflect prices in the housing market. A standard rent is charged, irrespective of the specification of the house or its location: in 2017/2018, it is £3,120 per year and considerably below market rates for comparable properties, especially in regions where rents are higher. This offers affordable housing to all ministerial residents.

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9 Ministers may make additional variable contributions (AVCs) to their pension scheme, but very few do so.

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- 2.8 MMHS's policy is to provide a house for any minister on becoming supernumerary who has served at least 10 years in active full-time ministry and fulfils a means-tested requirement based on capital held and household income. Ministers choose from MMHS's portfolio of available properties. There are occasions when MMHS will buy and add to their stock, for example, if a minister has a specific need to live in an area where MMHS does not own a property. A minister with some financial means is expected to take an equity share in MMHS's property, according to set requirements, and, in effect, the minister becomes a part-owner. The minister shares the proceeds proportionally on moving out or on eventual sale or disposal.
- 2.9 MMHS is very supportive of the needs of older ministers and their dependants who are in failing health and need to move nearer to family and support networks, sometimes very quickly indeed, and in such circumstances will make a property purchase. MMHS is also very focused on supporting the wellbeing of ministers in the key areas of their mobility and independence. Physical ageing can present considerable challenges and MMHS aspires to be the 'go to' place for advice and recommendations as well as provide well thought through practical assistance.
- 2.10 Where a minister, spouse or other dependent household member has special needs at the point of the minister's retirement, for example through incapacity or long-term debilitating illness, and needs a house of a particular specification, such as a bungalow, or in a very specific location, perhaps related to dependency on medical or other support, which requires a purchase price higher than the MMHS maximum, arrangements can be made to top-up the amount from either or both of the FSPD and a trust held by TMCP. In such cases, MMHS, FSPD and TMCP enter into formal shared equity arrangements.
- 2.11 It is noted that, while a minister is in the active work, the Circuit (or employing body) not only provides a manse but also pays Council Tax and water rates/charges. On becoming supernumerary, whether in their own home or an MMHS property, ministers are responsible for these payments, and if they own their home, for its insurance also.
- 2.12 The FSPD is available for various purposes as set out in SO 364(1). In this context it mainly provides (1) grants to supernumerary ministers, widows and widowers to meet emergency, or unexpected financial needs which may relate, for example, to general health and well-being or repairs and maintenance of their own property, (2) grants towards residential and nursing care, (3) small annual grants to help with such things as garden maintenance and (4) grants to MMHS, or ministers who own their homes, to cover costs of adaptation to the property to accommodate incapacity of any household member (these are available at the point of becoming supernumerary as well as afterwards). The Committee, which acts as the trustee of the FSPD, acts as

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generously as possible and encourages application for its funds. It is recognised that there is sometimes a reluctance to ask for supplementary grants and the Committee does call upon active ministers (particularly District Chairs, the MDO Warden and circuit Superintendents), as part of their pastoral support, to encourage their retired colleagues to benefit from the Fund<sup>10</sup>. The total amounts distributed are reported in the Committee's annual report to the Conference.

- 2.13 The Committee does not enter into any permanent or long-term agreements to supplement the annual income of supernumeraries, widows and widowers from the funds at their disposal<sup>11</sup> and does not envisage doing so. Inevitably, however, some whose income in retirement (pensions from the state, the Church and others, if any) is barely sufficient to cover their needs seek and are offered grants from the FSPD more frequently than others and grants may be given towards residential care on application annually. The Committee is committed to ensuring that those in genuine need are never declined.
- 2.14 This section has essentially applied to ministers becoming supernumerary at around the normal age in normal circumstances. A small number (currently less than ten per year) retire early on grounds of ill-health. The MMPS and MMHS have established arrangements to cover such an eventuality and the Committee uses the FSPD to offer further financial assistance on a case by case basis according to the circumstances and specific needs, not least during the period before the state pension is payable.
- 2.15 It is noted that there is an increasing trend towards ministers, upon 'sitting down' (ie being granted the formal approval of the Conference to become a supernumerary), resuming, sometimes after a short break, in part-time (or even full-time) ministry to fill temporary gaps arising from a shortage of active ministers stationed to a Circuit. Such arrangements usually involve remuneration which supplements their income. The line in the sand between active ministry and being supernumerary is becoming increasingly blurred as the demand for the services of supernumerary ministers grows. The number of candidates for ministry is now considerably less than the number of ministers retiring each year,
- 2.16 It is noted that supernumerary presbyters may also receive a fee for preaching (including the celebration of Holy Communion), currently at £25 per service. This does not apply to supernumerary deacons. For a period of time – often many years – it is an

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10 Based on the figure of 2650 retired ministers, widows and widowers, spread (albeit unevenly) over 368 circuits (October 2016 figure quoted in the Statistics for Mission report to the 2017 Conference), there is an average of between 7 and 8 per circuit and it will increase as the figures move in different directions. The amount of pastoral support per circuit must not be underestimated.

11 It is noted that TMCP has a similar policy.

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additional source of income for presbyters. The Committee is undertaking a separate project to review this practice and will present its report to the 2019 Conference.

### 3. The support of ministers and the covenant relationship

- 3.1 Both Memorial M9 and Notice of Motion 207 make reference to the covenant relationship between ministers and the Church, and infer a level of lifetime support for ministers by the Church which is beyond what is meant. The covenant is not intended to mean that there can be an open-ended commitment to meet all needs in all circumstances.
- 3.2 An understanding of the covenant relationship is set out in Appendix 1<sup>12</sup>. This outlines what the Church is responsible for providing both in active ministry and retirement, and states clearly that the covenant is not a contract.
- 3.3 The Committee therefore makes the observation that the Church, represented by the various participant bodies involved in responding to the Memorial and Notice of Motion, will always make its best efforts, acting as generously as possible, to meet the needs of supernumeraries-retired ministers, but that unconditional guarantees are not appropriate and cannot be given.

### 4. The question of marriage vows

- 4.1 The Committee would wish to challenge the inference in Memorial M9 that if a couple are compelled to live separately, they “find that their marriage vows, to be together to the end of their lives, have been effectively broken”. Only a very literal reading of the words in the marriage service would claim that the promises are kept only as long as the couple remain under the same roof.
- 4.2 There are many reasons why a married couple might live in separate dwellings for periods of time. Some ministerial couples may occupy different manses for the duration of appointments as they respond to their vocation and the needs of the Church. Lay people in many walks of life spend increasing amounts of time away from home – perhaps living in one place and working somewhere distant Monday to Friday. Such arrangements are not incompatible with the vows made at marriage. The Methodist Church speaks of marriage as “a mixture of dependence and independence, of being together and living apart”<sup>13</sup>. Fidelity is greater and more than physical proximity or distance.

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12 We are indebted to the Revd Dr Jonathan Hustler for preparing this.

13 Conference Statement, 1992 ‘A Christian understanding of family life, the single person and marriage’.

- 4.3 One of the factors that has shaped the developing understanding of marriage is the increased longevity in Western society (mentioned in paragraph 2.1). It is not uncommon for married couples to spend the last months or years of their lives in separate accommodation for the sake of the health and well-being of one or the other or both. Such arrangements may involve difficult decisions and the need for pastoral counsel and support. However much it may be desirable for both partners to remain under the same roof, it is submitted that it would be pastorally inappropriate to deny one partner the best accessible care if it is available in a different place. Also, it is only possible for both to share the same accommodation if it can be found in an appropriate location and the needs of the more able partner are not unduly compromised.
- 4.4 As with the undertaking given in paragraph 3.3, the participant bodies which have contributed to this response will always make their best efforts to meet the desirable outcomes for retired ministers and their spouses.

### **5. Response from MHA**

- 5.1 As a result of the conversations between the Committee and MHA, a response (below) was prepared by the Chair of the MHA Board, setting out MHA's position, particularly to address the requests made in Notice of Motion 207.
- 5.2 "MHA was created by the Methodist Church to serve the needs of older people. During the course of 75 years it has done this for all sections of the community and furthered the mission of the Church to care for all, inspired by Christian concern. This has only been possible due to the help and generosity offered by members of the Methodist Church, in many different ways, and MHA places a high value on its relationship with the Church. At all times MHA seeks to support those needing care in later life, taking into consideration their spiritual well-being and personal circumstances. We are always happy to discuss options and creative partnerships to provide care and support for those who are married and wish to be accommodated together."
- 5.3 It is clear that MHA's policy is to offer care for all, that it is grateful for the generosity of the Methodist people and its relationship with the whole Church, and that it will do what it can to accommodate couples wishing to remain together in residential care: but that does not mean that there is a 'quid pro quo' which gives preferential treatment to Methodists<sup>14</sup> or Methodist ministers or that enabling couples to remain together is practical in every situation. MHA, like MMHS and CAC, treats each request and case on its own merits.

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14 It is understood that the original designation, which might have been 'Homes for Aged Methodists', was declined precisely so as to open the offer to all.



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5.4 The observation is made that people do not give to charities generally with any expectation of benefiting from them personally in the future. They choose those to donate to and do so out of generosity and a commitment to the objectives of the charities and the causes they support.

### 6. Ways forward

6.1 This section gives responses to the four specific requests for action contained in the Memorial M9<sup>15</sup> and adds some further statements of position and commitment from the bodies represented in the discussions led by the CAC.

6.2 In response to point (a), it is virtually impossible to make such an assessment (of the number of presbyters and deacons for which the scenarios described might apply “over the next few years”) without detailed research into personal circumstances and, in any event, there are too many variables and unknowns. Any assessment made could prove too inaccurate to be useful. Rather, the Committee recommends that the commitments outlined below are a much more practical way forward, dealing with need as it arises, acknowledging that the numbers will slowly increase as people continue to live longer. The evidence of the requests made of the FSPD for financial support would indicate that it is not a large number: the Committee’s main report elsewhere in this Agenda reveals that 15 grants, totalling £67,295, were made in 2016-17 for residential and nursing care. None were declined.

6.3 In response to point (b), the Committee’s judgement is that the current practices, enhanced as outlined below, will indeed be sufficient.

6.4 In response to point (c), and in the light of the above comments, the Committee is as confident as it can be that cost implications can be met from existing sources. The FSPD’s annual income comfortably covers its expenditure on grants and experience indicates that the Methodist people continue to regard it with generous heart. There are also TMCP trusts which can be used in certain circumstances.

6.5 In response to point (d), the Committee resists the request to find the means “so that presbyters and deacons who are married or in a civil partnership can be assured of being able to live together until death finally separates them”. As has been argued in sections 3 and 4, although we fully appreciate the objective or wish as wholly worthy and desirable, we challenge the two main premises on which it is based and repeat that it cannot be unconditionally delivered in every situation.

6.6 Before outlining statements of position and commitment, the Committee wishes to

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15 Reprinted in Appendix 2: these were listed (a) to (d) on page 14 of the Memorials booklet for 2016.

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record some important principles relating to funding housing, support and (especially residential) care in retirement.

- 6.7 First, it follows from the comments about the covenant relationship that the element of personal responsibility for one's own future is emphasised, and that, from an early stage, ministers and their spouses may begin to make plans and choices as far as they are able. For many ministers whose spouses pursue their own careers, the idea that the Church needs to provide is an anachronism. We have come a long way from the days of the stereotypical male who entered ministry in his early 20s and whose wife was expected to become an unpaid helper/adjunct to his ministry. That is not to say that such a model is unappreciated today, but that it is very unusual.
- 6.8 Secondly, candidates for ministry (being on average older than in previous generations) may own a property when they enter training, as mentioned in paragraph 2.6. The Committee makes an observation and a recommendation on the matter. The observation is that the decision to retain the property and let it, mindful of the hazards it may bring, is for the student minister to make as part of accepting personal responsibility for the future. The recommendation is therefore that it is not appropriate for the Church to offer advice, but if it were to do so, then such advice must be consistent<sup>16</sup>: there is evidence that advice given hitherto has not been.
- 6.9 Thirdly, the Committee suggests that there is a hierarchy of sources of funds and resources on which ministers (as it applies to Methodist lay people and the population generally, and ministers should not be an exception) draw in retirement. They are (1) self and spouse, including the Church pension (2) state benefits, noting that local authorities have statutory duties (3) other family members where they are able and (4) the Church and other charities. Moreover, whilst there may be knowledge of what (4) offers, it should not be invoked until (1) to (3) are exhausted. It is recognised that there can be a reluctance to seek some state benefits, but ministers have properly made their contributions to state funds (through NI and tax) during their working lives and can feel at ease in seeking benefits to which they are entitled.
- 6.10 So to statements of position and commitment from the various bodies. As paragraph 1.2 outlined, the Committee had identified the need to work with the other bodies and therefore welcomed the general thrust of Memorial M9 and Notice of Motion 207 that cooperation should be more explicit. The fact of holding meetings, conversations and exchanges in the course of preparing this report has achieved a new beginning of joined-up thinking and working to which the participants are wholly committed, bilaterally or multilaterally. This will be invoked not least in the complex cases and

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16 As the qualification for MMHS property is 10 years' ministry, this should be taken into account if a candidate for ministry owns a property but can offer less than 10 years.

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situations which the Memorial and Notice of Motion addressed, but we underline that each is different and needs to be evaluated on its own merits<sup>17</sup>.

- 6.11 MMHS is not only committed to ensuring that all ministers who need provision of a home on retirement are found one but to ensuring that, through physical adaptation and pastoral support, ministers and their spouses, and widows and widowers are enabled to remain in their home for as long as possible. The Committee fully endorses MMHS's view that independent living in one's own home should be sustained until it is impractical to do so.
- 6.12 MMPS will continue to provide ministers' pensions according to its policies of contributions and benefits. The Committee will continue to ensure that standard stipends, on which the initial pension is based, keep pace with general inflation in the UK. It is noted that the Conference approved in 2015 that, in addition to the FSPD funding removal costs at the point of retirement, the Fund will also offer a relocation grant as it does when ministers move in the active work.
- 6.13 MHA's commitment was stated in section 5.
- 6.14 The Committee (the CAC itself) will commit to being as generous as possible in offering grants towards the annual costs of residential and nursing care<sup>18</sup>. For some years the amount was set at £3,000 per year and was increased in 2014 to £4,800. This is per person<sup>19</sup>: if both minister and spouse require such care, £9,600 may be paid. Whilst it is not a decision for the Conference as such, the Committee indicates that from September 2018, the figure will be increased to £6,000 per person per year (ie £500 per month), granted from the FSPD.
- 6.15 In commending existing preparation and training courses, the need to ensure that the Church offers or makes available sound guidance at every stage, from candidating for ministry to retirement and after, is underlined. It is suggested that part of the pastoral support, mentioned in paragraph 2.11, offered by active ministers (and especially District Chairs, the MDO Warden and Superintendents) is to ensure<sup>20</sup> that retired colleagues (and widows and widowers) are aware of their statutory rights to benefits

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17 The example given in paragraph 2.9 attests to this.

18 It is recognised that there are levels of care support, in outline as follows: after independent living and perhaps supported living with family there is sheltered accommodation (owned or rented), residential (with different levels of support) and nursing care, and finally care in terminal illness.

19 MHA's experience is that costs of residential care are primarily based on numbers of people rather than amount of space or numbers of rooms occupied.

20 It is not suggested that ministers always provide the advice – they may call on lay people who have specialist knowledge especially in the area of state benefit entitlements.

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and the availability of the Church's benevolent funds. The origin of the Memorial and Notice of Motion evince such concern.

- 6.16 The Committee, with its partner bodies, has considered the issues raised by Memorial 2016/M9 and Notice of Motion 2017/207 very thoroughly and has offered a positive but realistic set of responses which we believe will serve the Church well for the foreseeable future in its care for supernumerary ministers and their dependants. We urge the Conference to adopt the report and the recommendations within it.

### \*\*\*RESOLUTIONS

**34/1. The Conference receives the Report.**

**34/2. The Conference adopts the recommendations contained in section 6.**

**34/3. The Conference adopts the report as its further reply to Memorial M9 (2016).**

### Appendix 1

#### The support of ministers and the covenant relationship

*(Note: this Appendix is prepared for the sole purpose of informing the response to the Memorial and Notice of Motion and focuses on the specific issues raised in them: it is not a full and formal statement of the Church's understanding of the covenant relationship.)*

The covenant relationship between Methodist ministers and the Conference is set out in Standing Orders 700 and 701 (for presbyters and deacons respectively). Those SOs aver that "by receiving persons into Full Connexion as Methodist [ministers] the Conference enters into a covenant relationship with them in which they are held accountable by the Church in respect of their ministry and Christian discipleship, and are accounted for by the Church in respect of their deployment and the support they require for their ministry." (SO 700/1 (2)).

The SO makes clear that some ministers are engaged in the active work, whether in circuit or other appointments, and that others (those without appointment and supernumeraries) exercise a different sort of ministry, but are nonetheless still expected to offer help within the life and on behalf of the Methodist Church and to be appropriately supported in that.

In broad terms, the support that ministers require for their ministry whilst in the active work has been identified as:

1. A manse which serves both as a home and as a base for the work of ministry. There

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has been a general rule adopted that this requirement does not apply to those who (for whatever reason) are offering less than half of what would be full-time in the work of ministry.

2. A stipend, which is an allowance to cover the costs of living.
3. The repayment of all reasonable expenses.
4. An assurance that the Church will endeavour to ensure that appropriate support will be offered if and when the minister is unable to engage in the work of ministry (to which end the Methodist Ministers' Housing Society, the Methodist Ministers' Pension Scheme, and the Fund for the Support of Presbyters and Deacons (and its predecessors) were brought into being).

These provisions are designed to ensure that ministers are able to exercise their ministry free from anxiety about money and the necessity of earning other income. That is not to say that the level of stipend has ever been set to liberate ministers from all financial worry: those of an earlier generation will tell of the challenge of eking out the stipend until the first day of the next quarter. Stipends are set at a modest level in the context of the covenant relationship: the ministry for which those in Full Connexion are accountable to the Church includes the appropriate use of the Church's resources. The Church's ministers remember that the Church's resources consist of the freewill offerings of members and others over many decades (and any income generated from the use of those offerings) and that those offerings were made for the promotion of the mission of the Church.

The covenant relationship continues through and beyond the retirement of the minister. Those who are supernumeraries are expected to continue to offer what they can in the Circuits to which they are stationed and to be accountable through the Presbyteral Session of the Synod or the Diaconal Convocation for the way in which they live out their vocation. The Church remains accountable for the provision of adequate support, which has been understood as:

1. Ensuring that the minister and her/his spouse (and that spouse if widowed) has somewhere to live.
2. A pension which is enhanced if the minister takes early retirement on grounds of ill-health.
3. The repayment of all reasonable expenses.
4. The provision of pastoral care through which any case of hardship can be identified and if possible remedied.

Those who are without appointment or in appointments outside the control of the Church will usually be in a position to provide for themselves or to have provided from another agency much of the support offered to those in appointments within the Church. However, the expectation always remains that they can and in most cases will receive the support of the Church when an appointment comes to its end or their circumstances change.

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A covenant (as SO 700/701 makes clear in its proposed 2018 revision) is not a contract. The Christian understanding of Covenant is founded on Israel's experience of God's unmerited and faithful call to a life of obedience and witness, renewed through God's love made known to us in Christ who calls his disciples into a relationship of mutual love. John 15 (which is used in the Covenant service) with its image of the vine and the branches is one expression of this relationship as Jesus urges the disciples to abide in his love. The image emphasises that the branches are individually and corporately part of the vine within an organic relationship. Therefore, the covenant relationship between the Conference and its ministers is subsumed within this organic relationship with Christ. Hence it is not an exchange of services for remuneration nor even a set of agreed obligations (as if the Church were an employing institution of which the minister is not already an integral member); it is a relational expression of mutual engagement in the life of the Church in which loving care for each other and the appropriate stewardship of resources are both aspects of living together to God's praise and glory.

### **Appendix 2**

#### **M9 (2016) Support for ministers or their partners requiring care**

The York and Hull District Synod, Representative Session (Present: 120; Voting: 83 for, 18 against) draws the attention of the Conference to the needs of presbyters and deacons facing difficult care issues for either themselves or their partners. Specifically, they may face the following two situations:

- presbyters and deacons may have served as itinerant ministers for a significant part of their lives and have no property of their own but are now in need of additional care. In many cases, being in Full Connexion with the Conference, they were assured support for their lifetime, so have either not purchased property or were advised to sell or not acquire property. As such, due to the fact that local authority funding is also insufficient, they now have insufficient resources to meet the full cost of nursing or residential care provision.
- presbyters and deacons may be at a key moment in their lives and find that their marriage vows, to be together to the end of their lives, have been effectively broken due to the illness or impairment of one of the couple. This is due to the fact that the other member of the couple does not meet the eligibility criteria for local authority funding either for residential or nursing care. Because they have insufficient resources, there is inadequate provision for them to be looked after together.

The York and Hull District Synod therefore asks the Conference to direct the Methodist Council to take the following actions:

- (a) To make an assessment as to the number of presbyters and deacons for which the above two scenarios are likely to occur within the next few years.

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- (b) To assess whether the current practices for ministers who have been unable to purchase property or to set aside sufficient pension reserves are sufficient and allow for a home once they are unable to adequately look after themselves.
- (c) To assess the likely cost implications of providing the additional support ministers in this situation might need.
- (d) To draw together the expertise of all possible funding bodies, such as TMCP, Fund for the Support of Presbyters and Deacons, Methodist Ministers' Housing Society and MHA, to assess and make necessary plans to cover any revealed shortfalls in provision, so that presbyters and deacons who are married or in a civil partnership can be assured of being able to live together until death finally separates them.

### Reply

The Conference thanks the York and Hull District Synod for raising these important matters which are becoming increasingly pertinent due to factors such as increased life expectancy.

A starting point for consideration of this matter is that local authorities have a statutory duty to provide appropriate residential or related care to those who need it, within a means tested framework. Such an assessment framework will take into account the financial position of an individual minister and their partner, including whether they have assets such as housing and savings. Individuals are not barred from receiving care because they have little or no assets. That said, due to the specific care needs of an individual and local authority funding arrangements, it is possible that a couple may be separated as provision may not be available to the partner who is not in need.

Turning to the request to make an assessment about the number of presbyters and deacons who may need residential or related care within the next few years, it is difficult to estimate the likely numbers (due to variables such as health, family history of illness and lifestyle factors), other than to say in broad terms that it is likely that support needs may increase in line with trends experienced in wider society. Therefore, it is equally difficult to identify the likely cost implications of providing support, or to give assurances that financial arrangements will be in place which ensure that couples may be able to live together until death finally separates them.

However, the Conference recognises the importance of these matters to presbyters and deacons, and therefore directs the Connexional Allowances Committee to explore them further with other interested parties, including the Methodist Ministers' Housing Society (MMHS), Methodist Ministers' Pension Scheme (MMPS) and the Conference Office, and to report back to the 2018 Conference.

### Appendix 3

#### Notice of Motion 2017/207: Supernumeraries and care costs

Last year the York and Hull District sent a memorial to the Conference (2016/M9) about the support of ministers or their partners requiring care. The District thanks the Conference for its reply in which it directed the Connexional Allowances Committee to explore this with interested parties and report back to the 2018 conference. The York and Hull District notes the Connexional Allowances Committee's response to the reply in paragraph 3.8 on page 114.

The Conference clarifies that the memorial was raised with great concern that couples are not split up when only one of them meets the local authority criteria for nursing or residential provision. Whilst this is not just of concern for ministerial couples, but for all couples, Christian or not, supernumerary ministers have very often followed connexional encouragement not to acquire property during their ministry as part of the covenant relationship with the Methodist Church, understanding that they would be looked after for their entire lives. This agreement (not to acquire property) is no longer required of those now entering ministry, but it affects many supernumeraries.

The Conference believes that it should be a priority for the Connexion to honour marriage by enabling couples to live together when the housing provision provided by MMHS is no longer sufficient. The Conference notes that whilst local authorities do make provision for those who need care, there is, as the MHA report notes on page 96, a shortfall which is unaffordable for ministers who have no property to sell, and can be £200 per week or more, particularly when they wish to choose a Methodist home.

The Conference notes that many Methodist couples have spent their ministry in encouraging their churches to support MHA and often, naturally, prefer to be cared for in a Christian environment. The Conference therefore requests that MHA explore ways to respond to a growing need to receive couples into their care when one partner may not be eligible for local authority support, and also to plan to be able to offer shared accommodation in one room at a lower rate especially when one partner is able to relieve pressure on the facilities by providing a more caring role.

The Conference therefore strongly encourages MHA to engage with the Connexional Allowances Committee's discussions on enabling financial provision for married couples to remain together. It further encourages those involved in these matters in the name of the Church to campaign for a way to keep married couples together until death.

The Conference adopted the Motion.