



ANGLICAN DIOCESE OF GRAFTON

POLICIES AND PROCEDURES

SUBJECT: CLERGY REMOVAL FUND		REFERENCE NUMBER REG-006
DATE APPROVED 24 February 2022 by Bishop-in-Council		VERSION Original
IMPLEMENTATION DATE Immediate	REVIEW DATE AND FREQUENCY As required but at least 3 yearly	RESPONSIBLE FOR REVIEW Bishop-in-Council

1. PURPOSE

The purpose of this policy and procedure is to communicate the details of how the Clergy Removal Fund is maintained and accessed.

2. SCOPE

- 2.1 This policy applies to relocation associated with the commencement of a new stipendiary Parish ministry by an ordained minister whether the relocation is from outside of the Diocese or from within the Diocese.
- 2.2 Relocations from Australian and New Zealand locations are covered by this policy. In the event of a relocation from a country other than Australia or New Zealand, the individual circumstances will be considered by the Bishop and Registrar and relocation assistance may be offered that is less than what is required to move the entire household effects.
- 2.3 This policy does not apply to Stipendiary Lay Ministers (with the exception of 2.4 below), lay employees, clergy being employed in a management role or a role covered by an Industrial Award, appointments at the Bishop's Registry, Diocesan schools, Anglicare North Coast or Lismore Parish Centre Pre School. The relevant employer for these positions may offer relocation assistance as part of an appointment but the costs of that assistance is not to be sourced from the Clergy Removal Fund.
- 2.4 In circumstances where the Bishop appoints a Stipendiary Lay Minister as the Incumbent of a Parish instead of appointing a clergyperson, the Clergy Removal Fund may be utilised for any associated moving costs.
- 2.5 Costs arising under MUP-001 Parental Leave for Clergy are to be met from the Clergy Removal Fund.

3. DEFINITIONS

"Clergy Removal Fund (CRF)" – is the special fund established to assist with the costs of moving the household effects of clergy taking up a stipended position in a Parish of the Anglican Diocese of Grafton.

"Diocese" – the Anglican Diocese of Grafton.

“Finance and Information Systems Manager (FISM)” – the senior Diocesan employee responsible for the financial management of the Diocese.

“Industrial Special Risks insurance (ISR insurance)” – the insurance purchased to cover property damage and associated risks.

“Parish” – a Parish of the Diocese as defined by Chapter 10 of the Grafton Diocesan Governance Ordinance 2008 including a Transitional Ministry District.

4. PRINCIPLES

- 4.1 For many Parishes, the relocation costs involved with the commencement of a new Incumbent or Assistant Priest or other clergy position would be a significant unbudgeted expenditure. If Parishes were required to meet the full relocation costs in a single year, a number of adverse impacts are possible. Adverse impacts could include cancelling or deferring an appointment, choosing an appointment that reduces relocation costs and the appointee feeling unable to claim reasonable costs.
- 4.2 The Clergy Removal Fund was therefore established to smooth the financial impact of relocation on Parishes.
- 4.3 The CRF is established by contributions from Parishes in proportion to the number of other stipended clerical positions in that Parish. Where the position of the Incumbent is stipended it counts toward the contribution whether or not it is filled by a member of the clergy.
- 4.4 Funds from the CRF will be used to pay removal company invoices for clerical appointments approved by the Bishop and where the Registrar selects the removal company.
- 4.5 While there is the hope that in moving clergy to take up ministry in a new Parish that the appointment will be long and fruitful, there is no time expectation or bond associated with the CRF. Clergy will not be expected to repay any CRF costs if they leave their new appointment earlier than expected.

5. REQUIREMENTS

5.1 MAINTAINING THE FUND

- 5.1.1 The CRF is managed by the Finance and Information Systems Manager (FISM) with the funds being on the Balance Sheet of the Anglican Diocese of Grafton. Each transaction for the Fund shall be a Balance Sheet adjustment and not impacting the Diocese’s Profit and Loss Statement.
- 5.1.2 The CRF is to be of a size where it has sufficient resources to meet the demands of a year in which there is a higher than usual number of clergy relocations.
- 5.1.3 As part of the preparation of the annual budget of the Diocese, the required size of and contributions to the CRF shall be calculated by the FISM.
- 5.1.4 Parish contributions to the CRF shall be proportional to the number of stipended clerical positions in that Parish.
- 5.1.5 Subject to Bishop-in-Council approval of the overall size of the CRF, all participants in the Fund shall be invoiced for their contribution.
- 5.1.6 The balance of the CRF at the end of each year shall remain in the Fund for use in future years.

5.2 IMPLEMENTATION

- 5.2.1 When a stipended clerical appointment is formally offered, the Bishop's Personal Assistant shall contact the appointee and advise that relocation costs of household effects shall be covered by the Diocese in accordance with this policy.
- 5.2.2 The appointee is asked to obtain at least 2 quotes from reputable removal companies and provide those to the Registrar for consideration. Removal quotes may include packing services, packing materials, transit, short-term storage (e.g. where residence is not immediately available), delivery and unpacking but should not include transit insurance.
- 5.2.3 Removal costs will be assessed for reasonableness and will generally be limited to the equivalent of the moving of the contents of a four-bedroom family home. This will not usually include the moving of animals, boats and vehicles and items associated with the operation of a business except where these are incidental and do not significantly impact the relocation costs.
- 5.2.4 The Registrar will determine the removal quote to be accepted after consultation with the clergyperson being relocated.
- 5.2.5 Any removal contract that is accepted under this policy shall be with the Diocese and invoices sent with the Diocese as payee. Under no circumstances shall the clergy or another party be the contracted party. (Note: This is to ensure that the Diocese's ISR policy will apply and that the Diocese can recover GST costs.)
- 5.2.6 Any transit damage is to be reported as soon as practicable to the Diocese's Insurance Officer.

5.3 OTHER USES OF THE FUND

- 5.3.1 The Bishop-in-Council may determine by resolution to utilise CRF funds for purposes other than described above. Prior to resolving to utilise CRF funds for another purpose, the Bishop-in-Council shall consider whether the following conditions are satisfied:
- The CRF has sufficient funds to meet obligations in the current year;
 - The intended use relates to relocation of clergy serving in the Diocese; and
 - The intended use assists clergy:
 - on compassionate grounds (e.g. terminal illness)
 - to prevent financial hardship
 - in recognition of long or special service (e.g. when moving to retirement location), or
 - for another valid reason.
- 5.3.2 The Bishop-in-Council may delegate to the Registrar decisions under 5.3.1 up to a nominated financial limit.