6. Connexional Allowances Committee: Review of allowances above stipend

Contact name and	John A	John A Bell, Chair of the Connexional Allowances Committee	
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Resolutions	6/1.	The Conference receives the Report.	
	6/2.	The Conference discontinues the 5% allowance above stipend for Synod Secretaries according to the implementation plan set out in paragraph 6.	
	6/3.	The Conference discontinues local discretionary allowances above stipend of 10% or less, and directs the Connexional Allowances Committee to consider all requests for such allowances, as it now does for any above 10%, according to the implementation plan set out in paragraph 13.	
	6/4.	The Conference applies a 16% allowance above stipend to all appointments in the Shetland Islands, the Scilly Isles, the Isle of Man and the Channel Islands, and directs that these allowances be paid from the Methodist Church Fund according to the implementation plan set out in paragraph 42.	
	6/5.	The Conference directs that travel costs to Cornwall for medical reasons for the minister (and any dependent family members) stationed in the Scilly Isles be reimbursed from the Methodist Church Fund according to the implementation plan given in paragraph 42.	
	6/6.	The Conference directs that medical and associated insurance costs for ministers and their dependent family members currently paid by the Channel Islands Circuits be covered by the Methodist Church Fund according to the implementation plan set out in paragraph 42.	
	6/7.	The Conference directs the Council to establish a working group to review the matter of university funding for the children of ministers stationed in the Channel Islands, the Isle of Man, Gibraltar and Malta and make appropriate recommendations.	
	6/8.	The Conference directs the Council to report on the reciprocal state contribution and benefit arrangements between the UK and the Channel Islands, the Isle of Man, Gibraltar and Malta and make appropriate recommendations.	
	6/9.	The Conference directs the Council to review the matter of public sector employment arrangements between the UK and the Channel Islands, the Isle of Man, Gibraltar and Malta as it affects the spouses of ministers, and offer appropriate advice.	
	6/10.	The Conference discontinues the arrangement whereby ministers stationed in the Inverness and North of Scotland Mission Circuits may claim the costs of the twice-yearly private visits to 'the mainland', and directs that any consequent financial hardship be	

	compensated by grants from the Fund for the Support of Presbyters and Deacons according to the implementation plan set out in paragraph 38.
6/11.	The Conference defers the consideration of whether all ministers appointed to Circuits in the Scotland District should receive an allowance above stipend based on the custom that wedding and funeral fees are not paid or claimed, until after the Faith and Order Committee has reported to the 2017 Conference.
6/12.	The Conference amends SO 801(1)(b) and SO 801(1)(c) as set out at paragraph 50.

Summary of content

Subject and aims	Certain allowances above stipend: to rationalise those which do not depend	
	on the Faith and Order Committee review due in 2017	
Main points	 Proposal re the Synod Secretary allowance and indications of possible adjustments in some others post-2017 Proposals re local discretionary allowances of 10% and less Proposals re allowances in the islands and remote locations Proposals that the funding of certain allowances above stipend be covered by the Methodist Church Fund, rather than circuits and districts 	
Background context	This is part of the ongoing review of allowances above stipend and other	
and relevant	payments to ministers.	
documents		
	Connexional Allowances Committee's report to the Conference 2015, Agenda section 46, pp 446-475.	
Consultations	District Chairs meeting re the Synod Secretary allowance.	
	Chairs of the Shetland, Isle of Man and Channel Islands Districts and the	
	superintendent minister of the Scilly Isles Circuit.	
	The recommendations are brought, after discussion, with the endorsement of the Methodist Council.	

Summary of impact

Financial	The removal of the Synod Secretary allowance will reduce District costs marginally.	
	The removal of local discretionary allowances will reduce costs in circuits which pay them, unless the Committee approves any applications made.	
	The proposals re island allowances will increase overall costs, but reduce those in the circuits and districts and add to Methodist Church Fund costs, by an amount of £80,000 to £100,000 per year.	
Standing Orders	SO 801(1)(b) is to be amended, as indicated.	
Wider Connexional	The adoption of these proposals will contribute towards the more equitable	
	remuneration of ministers across the Connexion.	

Introduction

- Many Conference representatives are now familiar with the Connexional Allowances
 Committee's commitment to reviewing and reforming if necessary the system of allowances
 above standard stipend (and, for the record, fees for weddings and funerals and payments for
 other work). A milestone report was presented to and accepted by the 2015 Conference; see
 Agenda section 46, pp 446-475.
- 2. It was resolved (46/4, p 474) that the Faith and Order Committee should undertake a major review of the theological foundation of all matters of ministerial remuneration to be presented to the 2017 Conference. However, resolution 46/5 gave the Connexional Allowances Committee permission to review the qualifying posts and percentages above stipend during 2015/16, as the Committee believed that some rationalisation could begin before the theological review is completed.
- 3. This paper presents the Committee's recommendations, approved by the Methodist Council, acknowledging that some aspects are best left until after 2017, but that others can be implemented sooner. It is only about certain allowances above stipend; the Committee awaits the theological report before addressing the other dimensions and the matter of fees and payments further.
- 4. There are several categories of allowances above stipend, as listed below. The Committee brings its recommendations with respect to each in the subsequent sections of the paper.
 - Allowances related to the job or post held
 - Local and personal discretionary allowances above stipend
 - Allowances in the islands and remote locations
 - Allowances related to certain UK mainland locations

Allowances related to the job or post held

- 5. These are listed in the Committee's annual report to the Conference (as for example on pp 437-438 of the 2015 Agenda). It is recommended that these be retained (with the single exception in paragraph 6) until the theological review is completed, as any interim change would seem premature. Paragraphs 7 to 9 set out some indicative proposals of the Committee's thinking about other groups of posts.
- 6. The Committee referred the matter of the 5% allowance above stipend for Synod Secretaries to the District Chairs' meeting for their guidance and is grateful for the breadth of the feedback. This role is increasingly held by lay people on a voluntary basis¹ and the appointments of lay district administrators have considerably reduced the burden of work on the Synod Secretary. Moreover, there are other district offices held by ministers, which are now no less onerous, but which do not attract an allowance above stipend. The Committee concludes that there is no

¹ Though it is acknowledged that there are some Districts in which the role is part of a much wider remunerated post filled by a lay employee. In 2015-16, of the 31 Districts, the role of Synod Secretary is held by 12 ministers (of whom two are supernumerary) and 19 lay people.

longer a justification for retaining the Synod Secretary allowance above stipend of 5% and therefore recommends that it is discontinued as from September 2016 for new appointments, but retained by existing post-holders until their term of office ceases.

- 7. Whilst the Committee does not make specific proposals this year, we believe that, if any system of allowances above stipend is based on accountability or responsibility, the 7.5% allowance for superintendents is too low, especially in larger Circuits.
- 8. Equally, the Committee believes that many of the allowances above stipend in the 20% category for connexional and Methodist Council-controlled posts are excessive compared with others in the list. It makes no sense that all ministers in these posts receive the same allowance, irrespective of their role and responsibilities.
- 9. The Committee will propose that the non-separated District Chair posts be given a specific allowance above stipend, but that until the theological review is completed, the present arrangement of locally agreed allowances is retained.

Local and personal discretionary allowances above stipend

- 10. SO 801(1)(b) makes provision for the payment of discretionary allowances above stipend by a Circuit or employing body, specifying that any above 10% require the prior approval of the Connexional Allowances Committee. By implication, any of 10% or less can be agreed locally. It is noted that, in 2015/16, just 4 of the 11 allowances to compensate ministers who have been given permission by the appointed committee to live in their own homes exceed 10%.
- 11. Evidence gathered by the Committee in recent years indicates (1) that the payment of allowances of 10% or less is often a historic practice and is gradually being eroded, (2) that it is generally predicated on a Circuit's 'ability to pay' or sense of largesse and very few Circuits have introduced it since 2010/11, (3) that it is most common in the London and south-east region of England and (4) that it has led to inconsistencies and unfairness between geographically adjacent Circuits where one paid an additional allowance and the other did not. To substantiate these statements, paragraphs 43 to 49 give an analysis for 2015/16 with some comparisons with 2010/11. The Committee submits that the practice of Circuits offering such discretionary local allowances above stipend is an anachronism which can no longer be justified.
- 12. It is therefore recommended that the Connexional Allowances Committee approves all allowances above stipend and that Circuits wishing to pay them seek this approval, explaining the justification, whether it is above or below 10%. The consequent amendment to SO 801(1)(b) is set out in paragraph 50.
- 13. It is recommended that this arrangement be implemented from September 2017 for new and renewed (ie re-invited) appointments, but that ministers retain any such allowances until their present invitation expires.
- 14. The Committee affirms that the responsibility for funding any agreed discretionary allowance above stipend rests with the Circuit or appointing body.

Allowances in the islands and remote locations

- 15. This is the most complex group of all and affects a very small proportion of ministers, but in a connexional Church it cannot be sidelined. It is imperative that the Church ensures that ministers willing to be stationed in these places are not disadvantaged, financially or otherwise, by their commitment to itinerancy: moreover there is an impact on their families too. The Committee's thinking and recommendations are summarised in the paragraphs below, noting that the external circumstances, over which we have no control, can change². The issue for this group is wholly related to the overall cost of living, influenced in some places by locally determined tax systems, provision of health services etc, and not the nature of the posts. Some comments were made on the matter in the Committee's report to the 2015 Conference see Agenda pp 472-473.
- 16. The Committee has already made provision for ministers stationed in these places to claim the grossed-up costs of two return journeys for self, spouse and dependent children to mainland UK each year. It has been understood that this covers the journeys to and from the point of entry to and exit from the UK mainland. These costs are borne by the Methodist Church Fund. Any further allowances recommended in paragraphs 17 to 25 below are in addition to this.
- 17. Both Shetland and the Scilly Isles, being part of the UK, are subject to HMRC and offer UK public services. However, the cost of living is significantly higher because of costs of transporting goods, and the Scilly Isles relies on mainland Cornwall for the provision of all but the most basic health services. The Committee recommends that all appointments in Shetland and the Scilly Isles be given an allowance above stipend of 16%³ and that travel costs to Cornwall for essential medical reasons for the minister stationed in the Scilly Isles (and spouse and dependent children) be reimbursed. A note on funding is given in paragraph 41 and on implementation timing in paragraph 42.
- 18. The provision in paragraph 16 applies to the <u>Isle of Wight</u> with the addition of two further journeys per year. The Committee has concluded that the cost of living on the Isle of Wight is within the variation of the UK in general, that public services are comparable to the UK, and that the provision of two additional trips to the mainland is sufficient to cover all other personal needs.
- 19. <u>Gibraltar</u> is a British Overseas Territory which has its own £ currency, but tied exactly to the £ Sterling. By excluding housing costs, the overall cost of living, including provision of public services, is within the variation of the UK, and therefore no further special allowance is deemed necessary.

² The Committee is most grateful to Mr James G Shallow for some research carried out in mid-2015 on costs of living in the islands and remote locations and also to the ministers stationed in some for further information supplied. Their input has informed all of the Committee's recommendations.

³ In proposing 16% in this and other places, the Committee is taking into account that the cost of living in mainland UK varies from region to region and between city and rural area, ie there is no single, fixed reference point. Allowances which relate to the post, such as superintendent or District Chair, are in addition to this.

- 20. <u>Malta</u> is an independent country within the European Union and a member of the eurozone. It is potentially the most complicated case, but the research carried out indicates that, taking all aspects of cost of living and provision of services into account, there is no need for a special allowance. However, the Committee will monitor any significant future movement in the £-Euro exchange rate.
- 21. The Isle of Man is a British Crown Dependency, which uses the £ Sterling, but, being self-governing, has its own system of public finance and public service provision. However, health services are covered by a reciprocal arrangement with the UK. The general cost of living is significantly higher than the UK (because of transport and shipment costs), the slightly advantageous fiscal arrangements do not make a difference at the level of a ministerial stipend, and therefore it is recommended that all appointments be paid an allowance of 16% above stipend to compensate for this. Paragraphs 41 and 42 refer to funding and timing.
- 22. The <u>Channel Islands</u> are the most complex of all and during the period of this review, there were ministers stationed in Jersey, Guernsey, Alderney and Sark. Like the Isle of Man, the separate Bailiwicks of Jersey and Guernsey (which includes Alderney and Sark) are British Crown Dependencies with their own systems of public finance and service provision. Alderney is fiscally the same as Guernsey, but Sark has its own fiscal powers.
- 23. Costs of travel for personal reasons between the Channel Islands and mainland UK are covered by paragraph 16. This includes provision for the additional ferry journeys to and from Sark (to Guernsey) and higher air fares to and from Alderney.
- 24. Without detailing the arrangements, which are slightly different across the islands, suffice to say that medical costs for ministers and their dependents based in the Channel Islands are met by the Circuits where there is no reciprocal arrangement for health care with the UK. The Committee recommends that all the medical and associated insurance costs incurred, currently borne by the Circuits, be covered by the Methodist Church Fund. It does seem unfair that the island Circuits should bear these extra costs on behalf of the Connexion see paragraphs 41 and 42 re implementation.
- 25. There remains the question of general cost of living differences, significantly greater than the UK because of transport and shipment costs, but not noticeably decreased by the slightly advantageous fiscal arrangements at the level of a minister's stipend. It is recommended that all appointments in the Channel Islands have an allowance above stipend of 16%⁴: see paragraphs 41 and 42 for funding and timing.
- 26. The Committee raises three other issues which have become apparent within the last year or so and which require further investigation. First, university students in the Channel Islands are not eligible for UK government student loans, and some universities are seeking to charge international fees to CI residents. This puts ministers' children who happen to become 18 years

⁴ The Committee's initial recommendation, based on recent evidence available and recognising that this is not an exact science, was 15%. However, it transpired that all ministers in the Channel Islands already receive an allowance, calculated independently, of 16%. The Committee therefore recommended to the Methodist Council and the Council agreed that 16% should be recommended for all locations in this category.

old whilst their minister parent is stationed in the CI at a huge disadvantage. Indeed, it may profoundly impact the willingness of some ministers to be stationed in the islands. The Committee recommends that the Methodist Council establish a working group to look into this matter with respect to the Channel Islands, the Isle of Man, Gibraltar and Malta and make appropriate recommendations to the Methodist Council re funding. The Committee itself does not believe that the funds at its disposal (such as the FSPD) may be used for this purpose.

- 27. Secondly, it has transpired that ministers and their dependants returning from the Channel Islands to the UK may not be fully eligible for UK state benefits when they return. This is connected with reciprocal NHI contributions and particularly where they do not, or no longer, exist. The Connexional Team is already looking into these arrangements between the UK and the Channel Islands, and the Committee recommends (1) that the arrangements with the Isle of Man, Gibraltar and Malta be checked and that (2) the various arrangements relating to child benefits in these places also be reviewed.
- 28. Thirdly, it has also become apparent that the spouses of ministers serving in the Isle of Man who have worked in the UK public sector may be disadvantaged if they work in the Isle of Man for more than a certain length of time. The Committee recommends that the Council ensures that this point is explored in respect of the Channel Islands, the Isle of Man, Gibraltar and Malta so that the legal position can be established and ministers advised accordingly.

Allowances related to certain UK mainland locations - London

- 29. The Committee's report to the 2015 Conference (Agenda p 473) included the statement that, in its view, a specific London allowance could not be justified. The reasoning was set out in paragraphs 4.82 to 4.84 and is rehearsed below.
- 30. The Committee ascertained (based on an analysis of 2010/11 data) that the incidence of discretionary allowances above stipend is most common in the London and other Districts in the South-East of England. In some preliminary conversations with representatives of the London District in 2011/12, during a previous review of allowances, the Committee found a wide spectrum of views as to whether given that a manse is provided, thereby removing the overwhelming reason for London allowances in general employment (and applying to the Council's London-based lay employees) there was any residual evidenced additional cost of living in the London region.
- 31. The Committee concluded that, without embarking on the most extensive and expensive survey of regional costs of living, there may be some extra costs in London and indeed other cities (eg for car insurance) but that these are balanced in rural areas by higher motor fuel costs and longer journeys to supermarkets, education and health services and so on⁵. In other words, there is a modest variation in the overall cost of living in different places and regions of the UK, but nothing to justify the huge administrative complexity of introducing stipend variation or additional allowances.

⁵ As an aside, the Committee also notes that university tuition is free in Scotland, and medical prescriptions are free in both Scotland and Wales, at least for the present.

- 32. Further, the Committee reflected on the usual 'boundary problem' as an added challenge if a London allowance were considered necessary: what about the areas in the South-East and Beds, Essex and Herts Districts located just over the boundary, wherever that was drawn, and indeed the parts of the London District more distant from the centre may not have the same needs as the inner areas⁶.
- 33. The Committee's view is unchanged and therefore does not recommend the introduction of a London allowance.

Allowances related to certain UK mainland locations - Scotland

- 34. There are two issues in respect of Scotland, one which affects only two Circuits and the other more general. These are considered in order.
- 35. The provision of paragraph 16 has been applied to the two most northerly Circuits in Scotland, viz Inverness and the North of Scotland Mission, by resolution of the 2000 Conference. The ministers, at present, live in Inverness, Aberdeen and Peterhead. The next most northerly based ministers are in Dundee and Stirling, but they are not included. The Committee's assumption is that expenses may be claimed to Carlisle or Berwick-upon-Tweed, being the main points of entry to 'the mainland', though a case could be equally be made for Edinburgh or Glasgow in the heartland of the location of their district colleagues, or even Dundee or Stirling.
- 36. The basis for this provision is simply to assist ministers and their spouses and dependent children to visit family members twice a year: it is not related to the cost of living, but distance, and it therefore crucially depends on the destination of those visits.
- 37. Now consider the distances involved. Peterhead and Inverness are not significantly further from, say, Leeds or Manchester than is Penzance. The Committee therefore submits that there is no greater case for the application of paragraph 16 in Inverness and the North of Scotland Mission than there is in west Cornwall. Furthermore, its application in the two Circuits invokes a similar boundary problem (as in the London case) as it disadvantages ministers who live in Dundee or Stirling.
- 38. The Committee therefore recommends that the application of paragraph 16 be discontinued in the Inverness and North of Scotland Mission Circuits with effect from September 2017 for new or renewed (ie re-invited) appointments but retained for the period of existing invitations.
- 39. The Committee does recognise that the demands of itinerancy may lead to ministers and their families being stationed long distances from other family members, whether it is in northern Scotland, west Cornwall, west Wales or east Kent. It all depends on individual circumstances. The Committee is always willing to consider requests for grants from the Fund for the Support of Presbyters and Deacons (FSPD) on grounds of acute financial need, noting that the fuel costs of a

⁶ It is common for employers in the South-East to have an Inner London and a (lesser) Outer London Allowance, based on housing costs. They also have the problem of where to draw the lines.

600-mile car round trip are about £100, which can be applied to ministers stationed anywhere in mainland UK visiting family members anywhere else⁷. As this is an existing provision, it may be invoked with immediate effect.

40. The Committee has listened to the submissions made at both the Conference and the Methodist Council on behalf of the whole of Scotland highlighting that it is not customary for ministers to receive fees for funerals and weddings (based on the practice of the Church of Scotland) and that this may justify a distinctive allowance for all ministers stationed in Scotland. The Committee suggests that the resolution of this matter await the outcome of the theological review of ministerial remuneration, which will include reflections on the whole issue of such fees.

Financial responsibilities for funding specific allowances and implementation timing

- 41. The Committee recommends that the Methodist Church Fund bears the costs, estimated to be between £80,000 and £100,000, of all the allowances and financial provisions suggested in paragraphs 17, 21, 24 and 25 as it would seem unfair to penalise the Circuits and Districts simply because of their distant location. This is the principle already in place in respect of paragraph 16 and upholds an important dimension of connexionalism.
- 42. Having secured the agreement of the Methodist Council regarding 2016/17 budget provisions, the Committee recommends that the allowances above stipend in the same paragraphs (17, 21, 24 and 25) be implemented from September 2016.

Analysis of discretionary allowances above stipend

- 43. In 2015/16, from a constituency of about 1500 active ministers (presbyters and deacons), 130 are in receipt of a discretionary allowance of 10% or less, 7 receive an allowance approved by the Committee of over 10%, and a further 11 receive allowances specifically to compensate for living in their own homes. In 2010/11, there were 1660 ministers of whom 163 received allowances of 10% or less, 6 received over 10% and 12 housing allowances. Note that this excludes all ministers who receive allowances above stipend as a consequence of the post held, such as District Chair, superintendent, Connexional Team member etc as listed in the Committee report to the Conference (eg see 2015 Agenda pp 437-438).
- 44. Significantly, and supporting the assertion made in paragraph 11 point (1), the number receiving an allowance of 10% or less has decreased in the five years both in absolute (163 to 130) and percentage (9.8% to 8.7%) terms.
- 45. Moreover, the number of Circuits offering such allowances has decreased from 76 to 62, though the total number of Circuits has reduced too from 466 to 372. Comparison of the 2010/11 and

⁷ The Committee makes the point that travel from the islands always incurs ferry or air costs, which can be substantial, in addition to motor fuel costs once on the mainland, whereas travel from northern Scotland is fuel only.

- 2015/16 data indicates that, by and large, the same Circuits offer the allowances and very few new ones appear. This supports the comment made in paragraph 11 point (2).
- 46. Of the 130 cases in 2015/16, 55 are in the London District, 8 in the South-East and BEH Districts and 67 elsewhere. The comparable figures for 2010/11 were 59, 22 and 82, indicating a small reduction in the London District (7%), a dramatic reduction in the two districts around London (64%) and a significant reduction elsewhere (18%). In support of the statement in paragraph 11 point (3), about half are in London and the south-east region.
- 47. The London District is an excellent example of the statement in paragraph 11 point (4): 16 of the 36 London Circuits offer allowances above stipend and 20 do not. In many cases, the 'haves' and 'have-nots' are adjacent circuits. Elsewhere, including the two Districts surrounding London, 46 Circuits out of 336 offer such an allowance, exposing the same inequalities.
- 48. Of the 31 Districts, there are 9 in which no allowances above stipend are offered, excluding those with non-separated Chairs (see comment in paragraph 9). Other than London, the highest number of individual allowances in one District is 12, one has 8, one has 7 and the others have 5 or less.
- 49. For the record, the table below summarises the pattern of discretionary allowances of 10% and below throughout the Connexion. It is noted that some are clearly based on an amount rather than a percentage. The 2015/16 stipend figure is £22,860, hence 10% is £2286 per year. 79 allowances are of up to 5% and 51 between 5% and 10%.

Allowance	Number
Up to 2.5% (£572) excluding £500	25
Exactly £500 (2.2%)	8
2.5% to nearly 5% excluding £1000	24
Exactly £1000	14
5% (£1143)	8
5% to 7.5% (£1715)	22
7.5% to nearly 10% (£2286)	5
10% (£2286)	24
Total	130

- 50. Amendment to Standing Orders It is recommended to the Conference that Standing Order 801(1) is amended to ensure the Connexional Allowances Committee has to approve all discretionary local allowances. The Connexional Allowances Committee does not produce guidelines but rather sets out policy in its reports to the Council and the Conference. It is therefore proposed the opportunity is taken to remove reference to guidelines from Standing Order 801(1).
- 801(1) (b) Circuit ministers, other ministers in the active work appointed to stations within the control of the Church and probationers may also receive discretionary local allowances by arrangement with the circuit stewards or the officers of the relevant responsible body. Such arrangements shall be made according to guidelines issued by the Connexional Allowances Committee. Any payments which exceed a maximum of ten per cent of the basic minimum stipend

discretionary allowance shall require prior approval of that the Connexional Allowances & Committee.

801(1)(c) The circuit stewards or officers of the relevant responsible body shall provide a profile of the appointment including a statement according to guidelines issued by the Connexional Allowances Committee of the financial arrangements for that appointment, including any **approved** discretionary local allowances and potential opportunities for earning fees.

***RESOLUTIONS

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