

Connexional Allowances Committee

Review of Allowances above Stipend – interim paper

Contact name and details	John A Bell, Chair of Connexional Allowances Committee johnabell@supanet.com
Status of paper	Interim: annual report comes in April
Action required	Discussion and decisions on proposals.
Draft resolutions (proposals for decision at this meeting)	<p>18/1. The Council receives the report.</p> <p>18/2. The Council recommends to the Conference that the 5% allowance above stipend for Synod Secretaries be discontinued: timing details are given in paragraph 6.</p> <p>18/3. The Council recommends to the Conference that local discretionary allowances above stipend of 10% or less be discontinued as such, and that the Connexional Allowances Committee is directed to consider all requests for such allowances, as it now does for any above 10%: timing details are given in paragraph 13.</p> <p>18/4. The Council recommends to the Conference that a 15% allowance above stipend be applied to all appointments in the Shetland Islands, the Scilly Isles, the Isle of Man and the Channel Islands, and that these allowances are paid from the Methodist Church Fund: timing details are given in paragraph 42.</p> <p>18/5. The Council recommends to the Conference 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: timing details are given in paragraph 42.</p> <p>18/6. The Council recommends to the Conference 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: timing details are given in paragraph 42.</p> <p>18/7. The Council recommends to the Conference that the Stationing Committee (or another body nominated by the Council) reviews the matter of university funding for the children of ministers stationed in the Channel Islands, the Isle of Man, Gibraltar and Malta and makes appropriate recommendations.</p> <p>18/8. The Council recommends to the Conference that the Connexional Team reports on the reciprocal state contribution and benefit arrangements between the UK and the Channel Islands, the Isle of Man, Gibraltar and</p>

	<p>Malta and makes appropriate recommendations.</p> <p>18/9. The Council recommends to the Conference that the Stationing Committee (or another body nominated by the Council) reviews 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 offers appropriate advice.</p> <p>18/10. The Council recommends to the Conference that the present 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' be discontinued, and that any consequent financial hardship be compensated by grants from the Fund for the Support of Presbyters and Deacons: timing details are given in paragraph 38.</p> <p>18/11. The Council recommends to the Conference that the case for an allowance above stipend for all ministers appointed to a circuit in the Scotland Synod, based on the custom that wedding and funeral fees are not paid or claimed, be deferred until after the Faith and Order Committee has reported in 2017.</p>
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Summary of content

Subject and aims	Consideration of certain allowances above stipend: to rationalise those which do not depend on the Faith and Order Committee review due in 2017
Main points	<ul style="list-style-type: none"> • 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 and relevant documents	This is part of the ongoing review of allowances above stipend and other payments to ministers. 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.

Summary of impact

Financial	<p>The removal of the Synod Secretary allowance will reduce District costs marginally.</p> <p>The removal of local discretionary allowances will reduce costs in Circuits which pay them, unless the Committee approves any further applications made.</p>
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	The proposals re island allowances will increase overall costs, but reduce those in the circuits and districts and add to Methodist Church Fund costs: the amounts are to be estimated. A decision in principle is sought at this meeting.
Standing Orders	SO 801(1)(b) will need amending if the proposal re discretionary allowances is agreed
Wider Connexional	The adoption of these proposals will contribute towards the more equitable remuneration of ministers.

Connexional Allowances Committee

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Introduction

1. Members of the Methodist Council and representatives to the Conference 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 Conference in 2015: see Agenda section 46, pp 446-475.
2. The 2015 Conference directed (46/4, p 474) the Faith and Order Committee to undertake a major review of the theological foundation of all matters of ministerial remuneration, to be presented to the Conference of 2017. 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 proposals, acknowledging that some aspects are best left until after 2017, but that others can be implemented sooner. It is only concerned with certain allowances above stipend: the Committee awaits the theological review before addressing the other dimensions and the matter of fees and payments further. It is brought to the January 2016 meeting of the Council for consultation, with a view to bringing final recommendations to the April meeting in preparation for the 2016 Conference.
4. There are several categories of allowances above stipend, as listed below. The Committee brings its proposals 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 proposed that these be retained (with the single exception in paragraph 6) until the Faith and Order review is completed, as any interim change would seem premature. Paragraphs 7 to 9 set out some indicative proposals of its 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.

longer a justification for retaining the Synod Secretary allowance above stipend of 5% and therefore proposes 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 Team 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 Faith and Order 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, Appendix 1 (paragraphs 43 to 49) gives 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 proposed 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%. SO 801(1)(b) will need to be amended accordingly.
13. It is proposed 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 proposals 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 proposed 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 proposes that all appointments in Shetland and the Scilly Isles be given an allowance above stipend of 15%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 Isle of Wight 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. Gibraltar 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.
20. Malta is an independent country within the European Union and a member of the euro-zone. 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 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 proposed that all appointments be paid an allowance of 15% above stipend to compensate for this. Paragraphs 41 and 42 refer to funding and timing.

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 proposals.

³ In proposing 15% 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.

22. The Channel Islands are the most complex of all and at the present time, ministers stationed to the Circuits of the Channel Islands reside 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 proposes 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.
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 proposed that all appointments in the Channel Islands have an allowance above stipend of 15%: 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 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 suggests that the Stationing Committee (or another body nominated by the Council) looks into this matter with respect to the Channel Islands, the Isle of Man, Gibraltar and Malta and makes 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 Finance Office is already looking into these arrangements between the UK and the Channel Islands, and the Committee suggests that the arrangements with the Isle of Man, Gibraltar and Malta be checked.
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 suggests that the Stationing Committee (or another body nominated by the Council) looks into these circumstances 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 lay employees in MCH) – 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 on⁴. 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.
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 areas⁵.
33. The Committee's view is unchanged and therefore proposes that there need not be 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 Conference of 2000. 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.

⁴ 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.

⁵ 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.

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 proposes 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. However, given the provision of paragraph 39, the Council may consider that implementation from September 2016 is feasible.
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 600-mile car round-trip are about £100, which can be applied to ministers stationed anywhere in mainland UK visiting family members anywhere else⁶. As this is an existing provision, it may be invoked with effect from September 2016.
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 Faith and Order review, which will include reflections on the whole issue of such fees.

Financial responsibilities for funding specific allowances and implementation timing

41. The Committee proposes that the Methodist Church Fund bears the costs (still to be estimated) 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. The Committee's preference is for the proposals in the same paragraphs (17, 21, 24, 25) to be implemented from September 2016, but is aware that the Methodist Church Fund's budget for 2016-17 may not permit this in whole or at all until September 2017. It is therefore requested that the Committee may engage in discussion with the Connexional Treasurer and officers to ascertain what may be possible.

Appendix 1 – Analysis of discretionary allowances above stipend

43. In 2015-16, from a constituency of about 1500 active ministers (presbyters + 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 which 163 received allowances of

⁶ 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.

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 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

Summary of proposals

50. The proposals for changes in allowances and arrangements are given in the list below, noting that, as mentioned in the paper, there are some outstanding matters to be considered further. The Committee brings these proposals now, with the understanding that any which Council

agrees will be incorporated in the final Conference report brought to the April meeting, and any which are not agreed will be pursued according to the guidance of the Council.

*****RESOLUTIONS**

- 18/1. The Council receives the report.**
- 18/2. The Council recommends to the Conference that the 5% allowance above stipend for Synod Secretaries be discontinued: timing details are given in paragraph 6.**
- 18/3. The Council recommends to the Conference that local discretionary allowances above stipend of 10% or less be discontinued as such, and that the Connexional Allowances Committee is directed to consider all requests for such allowances, as it now does for any above 10%: timing details are given in paragraph 13.**
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