

Clergy Support Trust

**ACO – Navigating tomorrow:
evolving financial and wellbeing support**

- **Founded in 1655** to help the families of clergy dispossessed under Oliver Cromwell.
- **Sons & Friends of the Clergy** emerged in 2012, after the merger of two clergy support charities.
- **Traditional grant-giving charity** (individual grants, organisations) with charitable spend of £4.8m 2022, £3.1m in 2021, £2.6m in 2020, £3.1m in 2019, £2.5m in 2018.
- **Primary funding:** income generated from portfolio of investments.
- **Beneficiaries:** Anglican clergy, ordinands and the spouses, former spouses, children and dependants of living or deceased members of the clergy.
- **Charitable objects:** *‘for the relief or prevention of poverty or hardship or for the relief of illness and the promotion of health, whether physical or mental’.*
- **An independent charity**, not part of the Church of England or other provinces.

The UK’s oldest clergy support charity

Challenges facing clergy households

- Isolation
- Mental health
- Energy costs
- Cost of living
- The impact of the pandemic
- Moving area regularly
- Impact on clergy children
- Office holders, not employees
- One 'stipend' for all households
- Lack of boundaries (available 24/7)
- Debt, especially when training (ordinands)
- Need for clergy to take some time away, outside of their parish
- Differences between rural and urban ministry

Some clergy households are able to manage financially

2018



Why we needed to change

- Large grants received once a year created dependency
- Process-driven, transactional relationship
- Applicants who were in genuine need could be declined automatically ('computer says no')
- No explanation when an applicant was declined
- Little information on our website regarding who could apply and what for
- Existing grant criteria was not fit for purpose
- Long turnaround times – grant decisions and payments took up to 2-3 months to process
- Trustees spent Board meetings approving grants
- Lack of delegated authority for staff (remained at Trustee level)
- Our reputation, amongst clergy, needed huge improvement
- We weren't very good at meeting our charitable objects!

Culture shift - an 'applicant first' approach

2019

Clergy
Support†
Trust

Strategic priorities for 2018-22

1. Increase brand awareness
2. Support more Anglican clergy and their families
3. Reduce average grant per household
4. Increase partnership working

Foundations for change

- Re-brand
- Improved reporting
- New, scalable grant criteria, accessible in times of need
- Easier application process for smaller, non-means tested grants
- Reduce our average grant per household
- Faster grant decisions and payments
- Reduce grant processing inefficiencies
- Holistic approach, rather than transactional
- Increase number of applicants
- Impact measurement / customer feedback
- A greater range of support services and partnerships (eg. SleepStation, SPCK)

New grants policy

Where savings are less than £16k if own property, or up to £200k if don't own property.

Financial support grants

- 'Relief of Poverty'
- Means-tested (Minimum Income Standard)
- Apply once every calendar year
- Maximum: £3k grant
- Full financial disclosure

Emergency grants

- 'Prevention of Poverty'
- For small, unexpected costs
- Apply three times in a calendar year
- Maximum: usually £500 each
- Less financial disclosure

Health grants

- 'Relief of Illness'
- Non-means-tested
- No operations/surgery costs
- Unavailable on NHS, or where waiting times are unreasonable
- Mental and physical health needs

Wellbeing grants

- 'Promotion of Health'
- Non-means-tested
- Receive one every calendar year
- More preventative in nature
- Grants for rest, recuperation, fitness and leisure

Wellbeing support

- 'Promotion of Health'
- Non-means-tested
- Support for carer's (including young carers)
- Relationship & family counselling
- Coaching & mentoring

How we help

Where savings are less than £16k if own property, or up to £200k if don't own property.

Financial support grants

- Moving costs
- Car deposits
- General living expenses
- Furniture
- Childcare costs

Emergency grants

- Broken appliances
- Heating or energy costs
- School-related expenses
- Car-related expenses
- Separation grant

Health grants

- Support for talking therapies
- Mobility aids & equipment
- Assistive technologies
- Occupational therapy assessments
- Addiction support

Wellbeing grants

- Holidays
- Retreats
- Sabbaticals
- Gym memberships
- Weight loss groups

Wellbeing support

- Support for carers
- Support for young carers
- Relationship and family counselling
- Coaching and mentoring support

Support services introduced

SPCK

- Transitioned from processing book grants to an online library of 1,000 eBooks for study
- Free to access for Anglican ordinands and curates

CMCU (Churches Mutual Credit Union)

- For debts between £5-£20k
- Consolidation loan (CMCU) and Debt Incentive Grant (Clergy Support Trust) with the aim of helping serving clergy become debt-free.

StepChange Debt Charity

- For debts over £20k
- Debt management plan set up
- We can provide a grant of up to £10k or 50% of the total debt

The OT Practice

- UK-wide Occupational Therapy Assessment organisation
- Assess individuals (face-to-face) or via Zoom to establish the most suitable equipment (eg. mobility aids)
- Full report with recommendations

SleepStation

- Pilot launched October 2020, for serving clergy and partners/spouses only
- Sleep diary, questionnaire and tips for good sleep
- Those with severe insomnia can be referred to CBTi online programme of support

Support services introduced

JR Corporate Health

- Online and telephone counselling support for clergy and their spouses/partners
- Initial assessment provided by main partner (counsellor, nursing background and clergy spouse)
- Six sessions are available initially, but we can fund up to 18 sessions

Clergy Transitions Service

- For clergy who may be at a transition in their vocation and may need mentoring support
- Can include CV guidance, application advice and interview techniques
- Clergy Support Trust fund those clergy where Clergy Transitions Service are unable to obtain funding elsewhere

Visiting Case Worker Service

- Launched in July 2022 and in first year, 112 referrals, 73 of which we visited
- For our most vulnerable, or complex family situations where we need to provide in-depth, face to face support
- Able to consider income maximisation, children's Special Educational Needs, appeals, tribunals, link to local support etc
- Over £200k of additional annual external income identified

In the pipeline...

- Coaching service for clergy and their partners
- Expanding our Visiting Caseworker service in 2024

Strategic priorities for 2022-25

P1: Grants

We will aim to help 3,000 families with financial support each year, by 2025

P2: Support Services

Our current programme of specialist support will be significantly expanded, including increased help for clergy households with financial planning, mental and physical health.

P3: Support Hub

A new Clergy Support Hub will be launched on our website, so that clergy and their families can easily access a wide range of guidance and toolkits.

P4: Training

We will develop a programme of training and resources for Dioceses and TElS.

P5: Visiting

Clergy and their families requiring longer-term support will be offered more intensive support through a new team of caseworkers.

P3: Research

We will reinvigorate our approach to research, including by commissioning and curating work to improve outcomes for those we serve.

Strategic priorities for 2022-25

S1: Engagement

We will engage more proactively with Dioceses, TEIs and others, including in Scotland, Wales, Ireland and Europe, ensuring that our work represents, speaks to, and is accessible by the full diversity of our Church.

S2: Data

We will make more effective use of our data, and use this to contribute to research, advocacy, and thought leadership.

S3: Infrastructure

We will continue to improve our infrastructure and governance, developing better information management systems and operational processes.



Social media

In 2023, we took a new, targeted approach to our digital outreach, prioritising:

- **User-generated content:** clergy expressing their thanks for receiving a grant online turns our beneficiaries into our loudest advocates.
- **Case studies:** regular stories from clergy themselves, sharing their experiences and dismantling the stigma of asking for support.
- **Video content:** shorter, snappier and more engaging content, which summarises who we are and what we do quickly and effectively.



David Sims @davidjamessims · Aug 26

...

So thankful to the @ClergySupportUK who paid for our entire holiday to ensure it was accessible and wonderful for our kiddoes- and grownups too! A week on a farm, near the beach- fabulous. Thanks too, to a twitter friend who generously reached out too. So kind! 🙏

Taking the Trust to them

- Our Chief Executive, The Revd Ben Cahill-Nicholls visited senior clergy and diocesan leaders across the UK in 2022, and Ireland in 2023.
- We visited key conferences and events, like New Wine and the Christian Resources Exhibition.

21

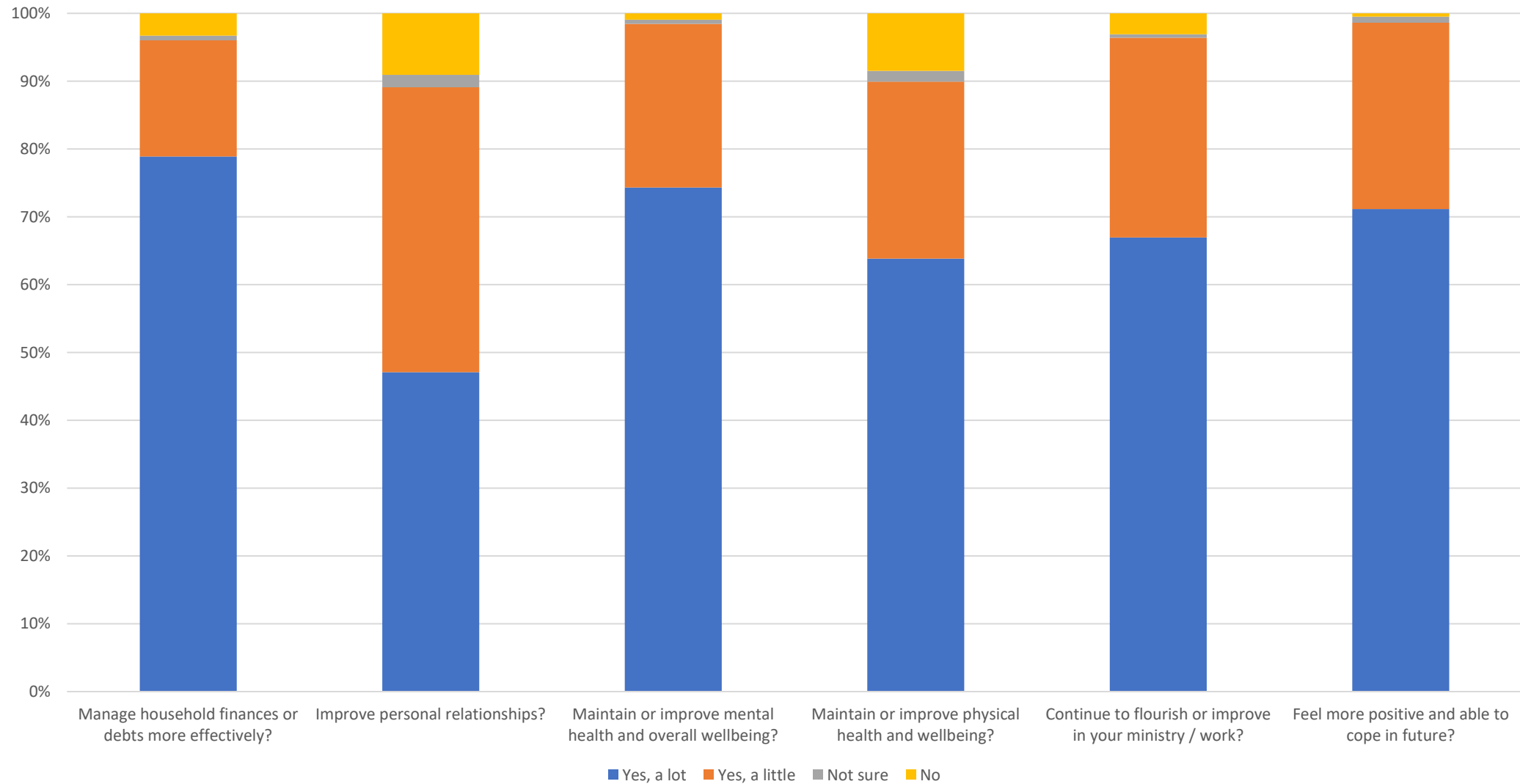
dioceses visited
across the UK



Outcomes – in numbers

	2018	2019	2020	2021	2022	2023 (YTD August)
Number of clergy families helped	547	906	1,303	1,608	2,318	2,330
Number of grants approved	547	1,408	2,436	3,534	5,416	4,700
Average grant amount	£4,200	£2,052	£996	£899	£887	£967
Average grant amount per household	£4,200	£3,189	£1,863	£1,975	£2,069	£1,950
Partnerships / support services	<ul style="list-style-type: none"> • SPCK/IVP – online library for ordinands 	<ul style="list-style-type: none"> • StepChange Debt Charity • Churches Mutual Credit Union 	<ul style="list-style-type: none"> • The OT Practice • SleepStation 	<ul style="list-style-type: none"> • JR Corporate Health • Clergy Transitions Service 	<ul style="list-style-type: none"> • Visiting Caseworker Service 	In talks with coaching organisation
Organisation grants (provided annually)	<ul style="list-style-type: none"> • Sheldon • Terry's Cross • College of St Barnabas • PEF 	<ul style="list-style-type: none"> • HolyRood House 		<ul style="list-style-type: none"> • Life to the Max adventure weekend for clergy children 	<ul style="list-style-type: none"> • Rock and wild adventure weekend for clergy children 	In talks with new retreat centre
Internal changes	Total team of 8 members of staff (3 GSOs)	New grants policy, new charity name/brand, weekly payments	Beneficiary introductory calls 5 grants & service officers	Data & Service Development Mgr + 1 Grants & Services Officer	Total team of 18 members of staff.	Total team of 22 members of staff. Implementing new CRM system.

Impact – what clergy tell us (2022)



How we continue to deliver

- **Consult** - ask your audience what they need from you as a charity
- **New projects** – take a ‘pilot’ approach, monitor and review
- **Partnership working** – what can you outsource?
- **Growth can cost** – resources, grants, services
- **Applicant first approach** – gain evidence, applicants at the heart
- **Board of Trustees** – focus on high-level strategic issues
- **Find your unique selling point** – private and confidential, independent of the Church



What people tell us

“The financial grants have been **a lifeline for me and my family** over the years. I’m not sure how we would have managed without them, and not having to worry unduly about money has a kind of ripple effect on the rest of family life, which also helps me to maintain a reasonably healthy work-life balance.”

“I was able to take my children on **a much-needed family holiday**, which provided a break from ministry and the pressures of vicarage life.”

“Being an ordinand was **extremely financially tight** and we relied on credit cards and family borrowing to get through.”

“Our two children both received EHCPs (education, health and care plans) due to the help with education psychologist assessments, with accurate diagnoses and are now receiving specialist educational provision. **The whole process was fast-tracked** by receiving the financial support.”

“When applying for something of a sensitive nature like counselling, it feels intimidating. Everyone I spoke to and interacted with from beginning to end was **wonderfully kind, patient and knowledgeable.**”

Thank you for listening

Sarah Davies
Director of Charitable Services

Sarah.davies@clergysupport.org.uk