



Credit: Diocese of Southwark

Resourcing Ministerial Education

A guide to financing training for ordination

July 2018

A reference handbook for dioceses and TEIs

Quick reference: block grant amounts

The block grant amounts that dioceses will receive for all ordinands funded through RME in 2018/19 are shown below for easy reference. RME only applies to ordinands who began training in September 2017 or later. Those who began prior to September 2017 continue to be funded under the old system.

Table 1: Annual block grant paid to dioceses by Ministry Division for 2018/19

Age Range	Band	Block Grant Generated (£)	Years Payable
<32	1	15,753	3
32-39	2	15,753	2
40-54	3	6,777	3
55+	4	6,777	2

See further detail in Part 3

The categories of block grant expenditure for 2018/19 are shown below:

Table 2: Annual tuition costs and allowances to be paid from the block grant by dioceses.

Pathway	Tuition Costs (£)	Single Accommodation Allowance (£)	Married Accommodation Allowance (£)	Personal/Book Allowance (£)	Average Travel Allowance (£)	Total (£)
Residential	8,760	5,493	3,318	2,703*		16,956(S) 14,781(M)
Fulltime Non-Residential	7,305			1,206	1,098*	9,609
Regional	6,087			318 (book only)	372*	6,777

*These are average figures. See further detail in Part 4

Table 3: Guideline annual travel expenses to be paid from the block grant by dioceses for 2018/19

Residential		Fulltime Non-Residential	
Distance between home and TEI (Miles)	Travel Allowance	Distance between home and TEI (Miles)	Travel Allowance
Less than 20	£0	Less than 20	£150
21-50	£171	21-40	£270
51-100	£279	41-65	£474
101-150	£369	66-150	£678
151-200	£456	150+	30p per mile
201-250	£561	5,000+	20p per mile

For regional courses there is an initial travel allowance of £150, with excess travel paid at 30p per mile (20p after 5,000 miles)

See further detail in Part 4

Introduction

Ian Barnetson, Head of Resources

Dear Colleague,

This is the second annual edition of the Resourcing Ministerial Education (RME) handbook. You will find here the financial arrangements for those entering ordination training in September 2018, and for continuing students who began in 2017. Ordinands who began prior to 2017 will still be funded under the old framework.

We expect around 580 ordinands to start training for ordination this year; a 6% increase on last year's 547, which was in itself a 14% increase on 2016.

The 14% increase last year coincided with the first year of implementation of the RME block grant. We are delighted that the implementation went smoothly, and we are not aware of any ordinands whose training pathway choices were constrained by the availability of finance.

On the whole, dioceses appear to have been cautious in their choices. The result is that over the three years of last year's starting cohort, 31 dioceses are expected to have an overall training fund surplus and 12 dioceses are expected to have a training fund deficit. This means that in most cases there are additional funds available to be spent on this year's intake. We urge you to feel more confident in your usage of funding for the coming year and to make every effort to invest any money left over from 2017 into the training of your ordinands for the 2018/19 cohort.

The main updates in this edition of the handbook are as follows:

1. Contingency funding for Band 3 ordinands studying for two years residentially has increased to 100%.
2. Further contingency payments can now be applied for to cover travel costs for those studying full time non-residentially or regionally part-time in Bands 3 and 4.
3. The TAP fund is now only for special hardship, following a decision by the Church Times.
4. Further details on related financing such as research degrees, ecumenical funding and disability and dyslexia support.

As before, this handbook is being distributed to all bishops, diocesan secretaries, heads of finance, diocesan directors of ordinands and vocations advisers, and within the theological education sector to principals and bursars. Please pass it on to any further colleagues who may find it useful. Please don't hesitate to contact Ministry Division should you have any comments or questions.

Thank you for your continued support for this important initiative, which is helping to build a solid foundation for the Church's ministry to flourish.

With kind regards



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I. Our vision for RME

Our vision is for a growing Church with a flourishing ministry. We aspire to increase the number of ordinands by 50% by 2020. Within this, we hope to increase the proportion of younger ordinands, and to encourage a greater diversity of candidates to pursue a life in ministry.

These are ambitious goals, which cannot be realised without a financial framework that provides a solid foundation. Put simply, our old framework for financing training for ordination was not ready to meet the challenge of growth. It was neither transparent nor well-understood. It was unable to provide the flexibility dioceses require, had not kept up with changes in pathway structures and did not provide financial accountability for decisions made.

Most fundamentally, our old framework would have been unable to support the significant increase in ordinands which we want to see as we seek to fulfil the mission of the Church.

Clearly a new model was needed, so an agreed set of objectives for Resourcing Ministerial Education (RME) was approved by General Synod in February 2016. Our agreed aims are to:

- Increase the number of ordinands, especially younger ordinands.
- Provide greater transparency between training decisions and financial outcomes.
- Operate with simplicity and certainty, whilst ensuring fairness to dioceses, ordinands and TELs.
- Maintain mutual support across the dioceses.
- Avoid transitional turbulence during the early years of implementation.
- Support the mixed economy of Theological Education Institutions (TEIs).

To realise these ambitions, in 2017 we introduced a new package of funding arrangements centred on a simple block grant, given to dioceses according to the number and age of their ordinands. You will have seen how the new arrangements create a different set of relationships and requirements for dioceses and TELs, who now enjoy closer partnerships working together to improve training for ordination.

In contrast to the old model, RME offers:

- ✓ Clear links between training choices and financial implications.
- ✓ Funding according to individual training needs and in support of diocesan and national strategy.
- ✓ Provision of sufficient funding for typical pathways, while providing equity and flexibility for new pathways.
- ✓ Support for growth while maintaining mutual support across dioceses.
- ✓ Incentives for sponsorship of younger candidates.

Dioceses are now able to make better decisions about pathways and their use of funding, with the flexibility and control the block grant gives them. Ministry Division continues to provide advice and support as the arrangements are implemented. Taken together, these reforms provide a solid foundation for training for ordination, as we seek to grow vocations everywhere.

2. The block grant in summary

Ordinands entering training now have their tuition fees and some allowances paid for by a block grant, given to dioceses according to the number and ages of their ordinands, irrespective of their pathway choice.

Funding for the block grant comes from the Archbishops' Council's Training for Ministry budget, which is made up of contributions from all dioceses on an apportioned basis (often referred to as "Vote 1").

The block grant system is used to fund all ordinands who began their studies from September 2017. Ordinands who started training prior to this continue to be funded under the old framework.

The block grant has been designed to provide greater flexibility and accountability for how funding is used. There are three key features you should bear in mind when managing your ministerial educational fund:

2.1. The block grant is paid to the diocese, not the ordinand

Ordinands no longer receive money from Ministry Division directly. Instead, an aggregate amount is paid to the diocese, who are then responsible for paying tuition and maintenance costs. It is simplest to think of an ordinand as *generating* block grant, rather than receiving it, so we use this term throughout this handbook.

2.2. Block grant amounts are determined by the age of your ordinands, not their pathway choices

Younger ordinands tend to follow more expensive pathways than older ordinands, so the amount of money dioceses receive for ordination training has been set to reflect this. Block grant amounts have been calculated based on the typical pathway choices for different age groups, and are reviewed annually to stay current.

The block grant is not though, a recommendation of which pathway ordinands should follow. You are free to send an ordinand on whichever pathway you wish, with the final decision ultimately resting with the sponsoring bishop. However, block grant funding will only be provided for ordinands on approved pathways at accredited Theological Education Institutions (TEIs).

There are two important consequences of this for dioceses. Firstly, depending on the choices you make, an ordinand may generate more or less money than the cost of their training, leaving you with a surplus or deficit. Secondly, depending on the choices you make, you may continue to receive money after an ordinand has already been ordained, or not receive funding even though they are still in training.

2.3. Block grant money generated by one ordinand needn't be spent on that ordinand alone or even in the same cohort

Surpluses created by receiving more money from the block grant for an ordinand than their pathway costs can be spent on covering any deficits created by sending ordinands on more expensive pathways than their own block grant generates. It can also be held on to for subsequent years, to cover potential deficits in future cohorts. Similarly block grant generated in previous years can be spent in the current academic year.

This flexibility is one of the most important aspects of RME, and has meant that in the first year of implementation we did not receive any evidence of an ordinand being refused a pathway choice on financial grounds. We would strongly encourage dioceses to make full use of this flexibility, by spending any surplus block grant money on the training of your ordinands, either in the same year or in the years immediately following.

3. Receiving block grant funding

Dioceses apply for block grant funding for all their new ordinands prior to September. Ministry Division will then pay an aggregate amount to dioceses termly.

3.1. Confirmation of training pathways

Training pathway choices are the responsibility of the sponsoring bishop, in consultation with the ordinand, Diocesan Director of Ordinands (DDO) and Theological Education Institution (TEI). Ministry Division are always happy to offer advice.

Because the block grant can only be spent on approved pathways at accredited institutions, a Confirmation of Training form (COT) needs to be completed as a record of every pathway for every ordinand entering training. This is only required for new ordinands, not for those already in training.

The COT, an example of which has been included in Appendix A, has a first section completed by the TEI, who then send it to the diocese. The diocese fills in its section of the form, before sending it back to the TEI as confirmation that the diocese will fund the pathway.

A copy is also sent to Ministry Division, as confirmation that the ordinand is indeed entering training, so that block grant funding can be paid to the diocese, and to enable national statistics to be maintained. Once received, Ministry Division will confirm to both the diocese and the TEI that the particular ordinand will generate block grant funding. See Appendices B and C for more detail.

The block grant will still be paid in the event of a bishop's set-aside of a Bishops' Advisory Panel (BAP) recommendation. However an ordinand must have attended a BAP to generate block grant funding.

3.2. Changing pathways

Any pathway changes must be agreed by the diocese and the TEI, and notified to Ministry Division. These include withdrawal from training, suspension of training, moving to a different TEI or change of pathway within the TEI.

3.3. Individual Pathway Approval

We expect most ordinands to be following an established pathway. However, we recognise that such a pathway will not always be appropriate for every ordinand.

If you are proposing a pathway for an ordinand which will need individual approval, please get in touch with our IME Pathways Adviser, Keith Beech-Gruneberg, at keith.beech-gruneberg@churchofengland.org. While strictly it is dioceses who should seek approval for pathways, it may sometimes be easier for a TEI to do so, and that is perfectly acceptable if the diocese is happy with this.

In general, it is best for approval to be sought after the ordinand has been to a BAP. However if the ordinand is coming to a BAP late in the academic year, or the training proposal is complex or unusual, it would be better at least to start the process of seeking individual pathway approval beforehand.

3.4. How much finance will dioceses receive?

The block grant is determined according to the age of the ordinand on the 1st of September the year they begin training (so for example an ordinand who turned 32 during training would still be treated as being in Band 1 for the whole of their training).

The age bands and their corresponding block grant amounts are as follows:

Band 1: For ordinands aged under 32 at the start of training, dioceses will receive **£15,753 for three years**. This amount has been calculated to provide sufficient funds to cover the costs of a three year residential pathway.

Band 2: For ordinands between 32 and 39, dioceses will receive **£15,753 for two years**. This amount has been calculated to provide sufficient funds to cover two years on a residential pathway.

Band 3: For ordinands between 40 and 54, dioceses will receive **£6,777 for three years**. This amount has been calculated to provide sufficient funds to cover the costs of a three year regional pathway.

Band 4: For ordinands aged 55 and over, dioceses will receive **£6,777 for two years**. This amount has been calculated to provide sufficient funds to cover the cost of a two year regional pathway.

The block grant is set to reflect the most numerous pathway choices of each age band over the past five years. It is not a prescription of which pathway should be followed.

The diocesan block grant is the aggregate of grants calculated according to the age of all ordinands sponsored by a diocese, shown in Table 4 below. It will be paid by the Archbishops' Council to the dioceses termly.

As the size of the diocesan block grant is based on the ages of their ordinands, it is not affected by the length of pathway chosen. So if ordinands from Band 1 or Band 3 only follow a two year pathway, the diocese would still receive funding in the third year. Similarly, if ordinands in Band 2 or Band 4 follow a three year pathway the diocese would not receive funding in the third year.

Table 4: Annual block grant, tuition costs, and average basic allowances for ordinands starting in autumn 2018.

Age Range	Band	Total annual block grant	Tuition costs covered by block grant	Average basic allowances covered by block grant	Number of years of block grant received
<32	Band 1	£15,753	£8,760	£6,993	3
32-39	Band 2	£15,753	£8,760	£6,993	2
40-54	Band 3	£6,777	£6,087	£690	3
55+	Band 4	£6,777	£6,087	£690	2

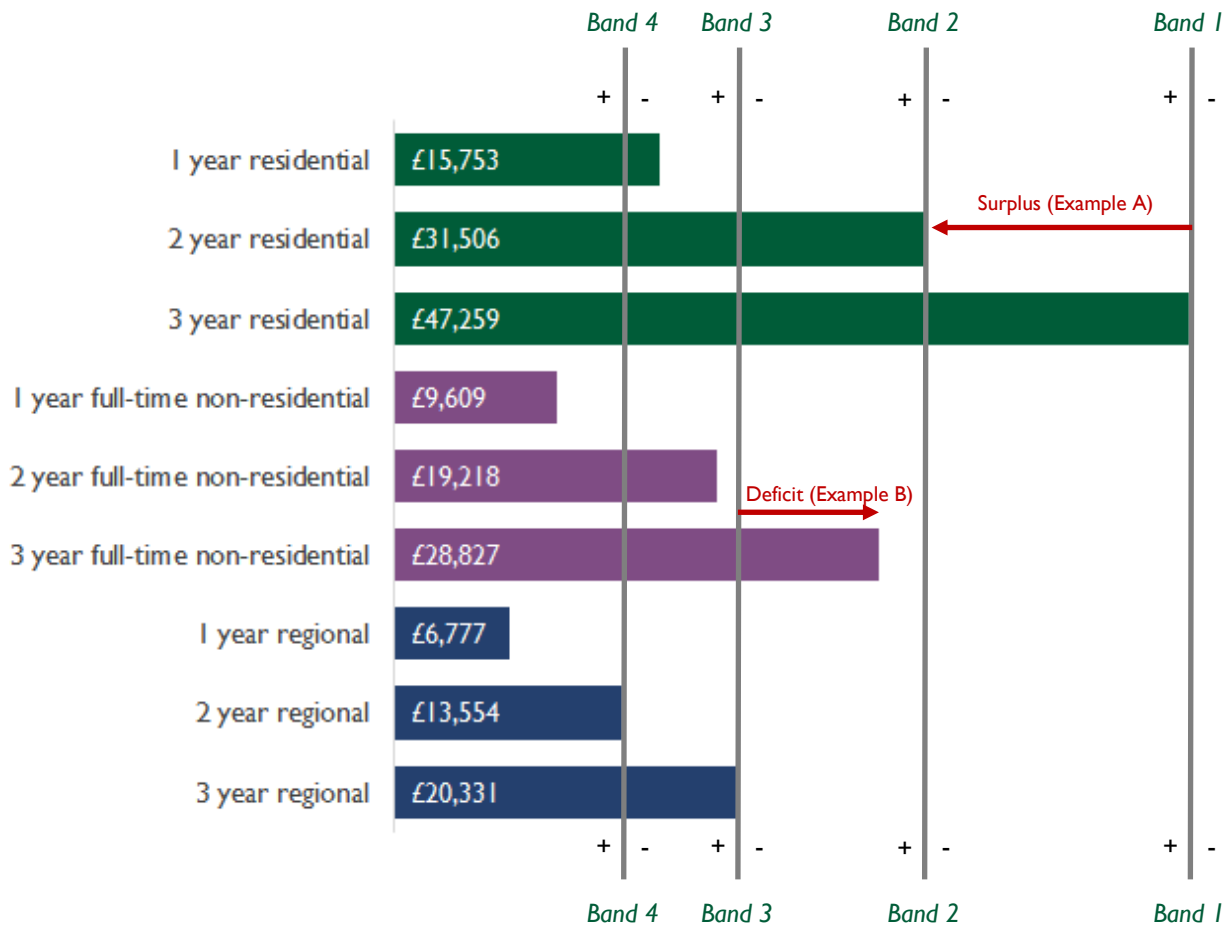
Payments in the second and third years will reflect tariff and allowance levels pertaining at that time and not at the start of training. For ease, worked examples and illustrations in this booklet are based on 2018/19 levels.

Should an ordinand begin their training earlier in the academic year than September, then they will still only generate block grant funding from September. Training prior to that will therefore need to be funded from existing block grant surpluses or other diocesan sources.

In more detail: How the block grant works

The illustration below shows how the block grant amounts relate to the typical costs of different pathway choices, and how this will create surpluses or deficits depending on the choices made.

The vertical lines indicate the block grant amounts generated by each age band. The horizontal lines show average pathway costs, based on the sum of tuition costs and average basic allowances.



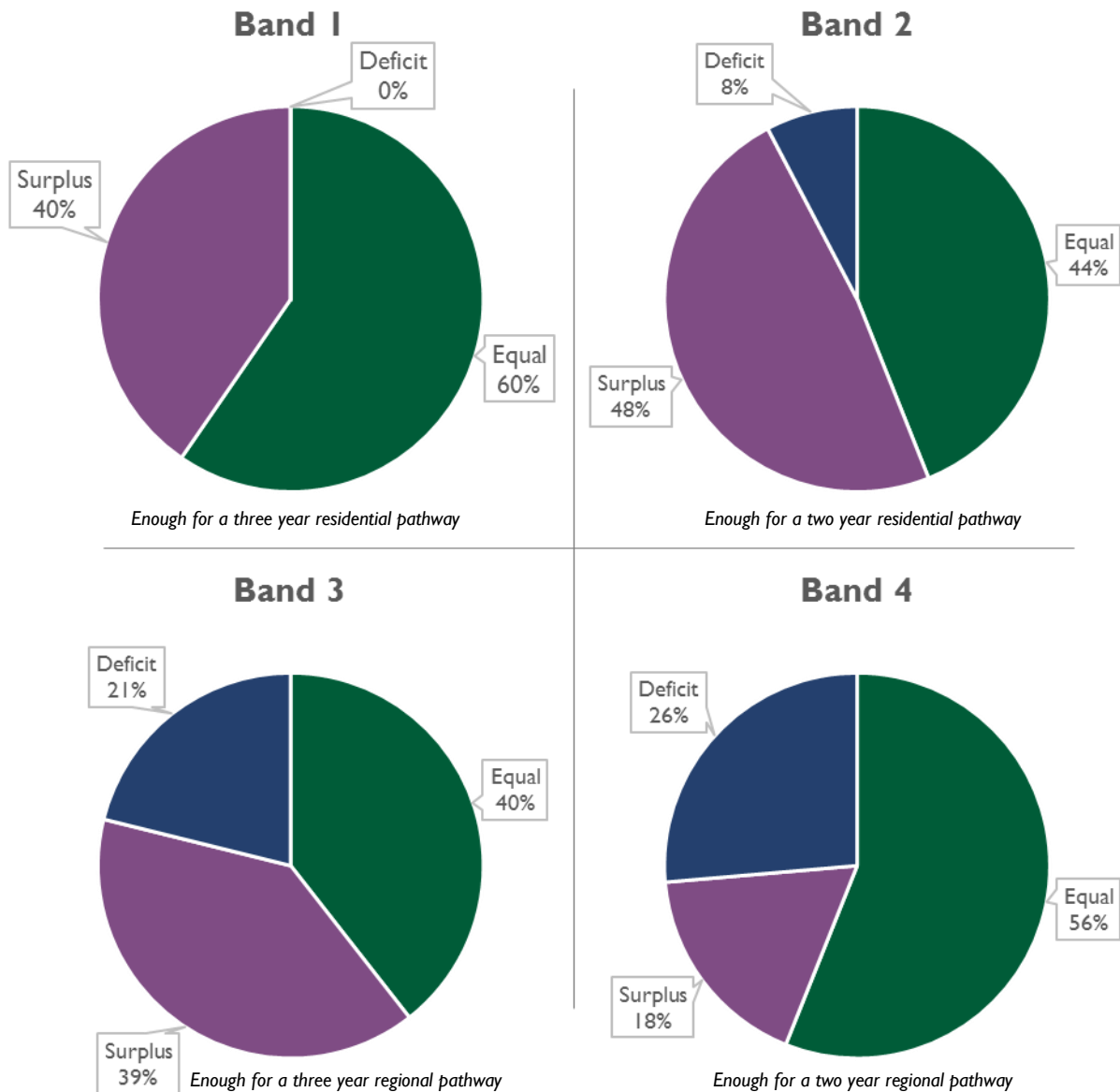
The amount of money dioceses receive is determined by the age of the candidate, not their pathway choice. Therefore, as the chart above shows, for some ordinands there will be a surplus of funding and for others there will be a deficit, depending upon the pathway choices made.

To read this illustration, for an ordinand within any given age band, any pathway choice to the left of the respective vertical line will create a surplus (Example A: a Band 1 ordinand following a 2 year residential pathway), whilst any pathway choice to the right of that line will result in a deficit (Example B: Band 3 ordinand following a 3 year full-time non-residential pathway).

Dioceses are encouraged to use surpluses generated by one ordinand to cover deficits created by others, so that every ordinand can follow their appropriate pathway.

In more detail: How block grant amounts are set

The block grant has been set to reflect the most numerous pathway choices of each age band over the past five years. The charts below show the proportions of each age band for the 2017 cohort whose actual pathway choices meant the block grant they generated was equal to, more than, or less than, their average pathway cost.



Based on these pathway choices, the block grant amounts are sufficient to fund a typical cohort, with surpluses generated by one ordinand used to cover the deficits of others.

It may be that in some years the appropriate pathway choices for a particular cohort result in a net surplus or a net deficit. However we nonetheless expect that across multiple years this will balance out when dioceses spend their surpluses on the training of future cohorts.

4. Spending the block grant

4.1. What training can the block grant be spent on?

Upon receipt of the block grant, the diocese must pay it into a restricted fund for ministerial education training for the ordinands they sponsor. The block grant can only be spent on Initial Ministerial Education Phase One (IME1) pathways which have been approved by Ministry Division at accredited Theological Education Institutions (TEIs).

It was agreed that for the transitional three year period from September 2017 to September 2020 the block grant can only be spent on IMEI pathways, although the vision remains that eventually the funding may be applied to other elements of ministerial training such as after selection but prior to entry into a TEI, or during a first curacy (IME2). The only exception to this is the non-poolable charge relating to full-time non-residential maintenance, described in Part 8.5.

The Ministry Council has clarified that block grant funding may be used for ordinands continuing on an approved IMEI pathway at an accredited TEI, even after they have been ordained.

Dioceses must report details of their block grant expenditure to the Ministry Council as part of the annual monitoring review described in Part 8.1 and Appendix F. This is to ensure mutual accountability for funds to which all contribute.

4.2. Flexibility in spending the block grant

The block grant does not all need to be spent in the year in which it is received. Indeed, one of the main purposes of RME is to provide flexibility for dioceses to manage their own training funds on a continuous basis across many years. We therefore encourage all dioceses carrying over a surplus from 2017/18 to make full use of this flexibility by spending it on the training of the 2018/19 cohort.

Similarly, the grant calculated from the age of a particular ordinand is not limited to expenditure on that ordinand, but can be spent on others in the cohort if their training needs require a more expensive pathway than their individually generated grant would permit.

This flexibility has been built into RME so that ordinands can follow whichever pathway is most appropriate for them and for the diocese. The typical pathway associated with each band should not therefore be treated as the recommended route. It is merely the basis on which the size of the grant has been calculated.

If the aggregate costs of training pathways in any year exceed the block grant received in that year then the dioceses would be expected to fund this from the balance of their block grant training fund account from prior years or from their own resources.

4.3. Tuition fees and allowances.

The block grant should be spent to support the most appropriate pathway choice for the ordinand. Tuition costs and allowance rates that will operate from September 2018 for all ordinands are shown in Table 5 below:

Table 5: Annual tuition costs and allowances to be paid from the block grant by dioceses.

Pathway	Tuition Costs (£)	Single Accommodation Allowance (£)	Married Accommodation Allowance (£)	Personal/Book Allowance (£)	Average Travel Allowance (£)	Total (£)
Residential	8,760	5,493	3,318	2,703*		16,956(S) 14,781(M)
Fulltime Non-Residential	7,305			1,206	1,098**	9,609
Regional	6,087			318 (book only)	372**	6,777

*This is an average figure, based on a combined personal allowance of £1,662, a short vacation allowance of £468, a long vacation allowance of £528, and a travel grant of between £0 and £561 (see residential travel allowance in Part 4.5)

**This is an average figure. See respective travel allowance tables in Part 4.5

Tuition costs continue to be set by Ministry Division at a standard rate according to pathway. TEIs are not permitted to set their own tuition fees for ordinands. In specific circumstances agreed between the TEI and Ministry Division the tuition costs may differ from those above. TEIs invoice the dioceses in accordance with the process outlined in Part 6 for both the tuition fees and, if a residential college, the appropriate accommodation allowance (sometimes known as college maintenance).

The block grant calculated for Band 1 and Band 2 ordinands includes a weighted average of the single and married accommodation allowances (£4,290). This means the block grant will be more generous than needed for married residential ordinands and not entirely sufficient for single residential ordinands. Details of personal/book and travel allowances are explained in Tables 6 and 7.

4.4. Allowances payable from the block grant

The £2,703 personal/book allowance shown in Table 5 is a combination of the weighted average of the accommodation allowance together with a personal book allowance, short and long vacation allowances and an annual travel grant between 0 and £561 (see Table 7). We have included this figure to give an indication of costs, but it will of course not reflect the actual allowances paid to individual students, which can range from £2,130 for a married ordinand with no long vacation allowance to £3,219 for a single ordinand in their first year whose house is 250 miles from college. The actual allowances paid of course depend upon the circumstances of the ordinand and their pathway.

Dioceses should pay the appropriate personal and book allowance to ordinands directly, using money from the block grant, following the timeline process in Part 6. It is for the diocese to decide upon an appropriate payment schedule for these allowances, but they are likely to align with the start of term. Details of allowances are shown in Table 6 below:

Table 6: Allowance payable from the block grant

	Residential Full-Time (£pa)	Non-Residential Full-Time (£pa)	Regional (£pa)
Combined Personal/Book Allowance	1,662	1,206	318 (book only)
Short Vacation Allowance	468		
Long Vacation Allowance*	528		

*Not applicable for final year.

A personal contribution towards allowances may be assessed where ordinands on full-time residential or non-residential pathways have additional income from savings in excess of £1,375 per annum. If this is the case then the allowance is reduced by 60% of the excess over this figure.

Similarly if ordinands following a regional part-time pathway receive a net personal income of more than £48,790 then no book grant will be payable.

4.5. Travel expenses payable from the block grant

Dioceses are responsible for paying the travel expenses of ordinands on all pathways, with the exception of ordinands who entered training prior to 2017 who should continue to submit their travel expenses forms to Ministry Division. The Ministry Division travel claim form is available at Appendix E and online should dioceses choose to use it.

Single ordinands on full-time residential courses can receive an annual travel allowance to cover travel between their home and the TEI at the beginning and end of each term. The amount of allowance depends upon the distance between home and TEI as shown in Table 7 below.

For ordinands on full-time non-residential or regional part-time pathways, the travel allowance figures in Table 5 are averages across all ordinand claims for these pathways. They should be treated as guidance on likely levels of expenditure. We have significantly increased both figures following a travel survey of the dioceses in Spring 2018.

All travel expenses should be paid from the block grant. In the event that travel expenses differ significantly from these levels, contingency funding may be available for ordinands in Band 3 or Band 4 following non-residential pathways or regional part-time pathways (See Part 8.4). The current guidelines on initial travel allowances for ordinands on non-residential full-time courses are shown in Table 7 below. Reimbursement of any travel expenses in excess of these sums are paid at 30p per mile, and then at 20p per mile after 5,000 miles.

For ordinands on regional pathways the initial travel allowance is £150 with any excess claims also being paid at 30p per mile (20p per mile after 5,000 miles) or actual public transport expenditure.

Initial travel allowances can provide a cashflow surplus for ordinands at first, which are then deducted from actual travel expenses.

Table 7: Guideline annual travel expenses to be paid from the block grant by dioceses.

Residential		Fulltime Non-Residential	
Distance between home and TEI (Miles)	Travel Allowance	Distance between home and TEI (Miles)	Single Travel Allowance
Less than 20	£0	Less than 20	£150
21-50	£171	21-40	£270
51-100	£279	41-65	£474
101-150	£369	66-150	£678
151-200	£456	150+	30p per mile
201-250	£561	5,000+	20p per mile

For regional courses there is an initial travel allowance of £150, with excess travel paid at 30p per mile (20p after 5,000 miles)

5. The block grant in practice

The following five examples show how the block grant works in a variety of settings:

Example One: How dioceses can receive surplus block grant funding

Peter is 26 and married. As he is under 32, Peter is in Band 1. A Block Grant of £15,753 would therefore be paid to his sponsoring diocese each year for three years.

Following conversation between Peter, his diocese, and his preferred theological education institution, Peter's bishop decides that Peter should study full-time at a residential college. Peter already has a theology degree, so his bishop agrees that he need only study for two years as is usual for those with prior knowledge.

For each of these two years, the TEI charges £8,760 in tuition fees and £3,318 for his married accommodation allowance. Each year Peter receives a personal allowance of £1,662, a short vacation allowance of £468, and a long vacation allowance in his first year of £528. Separate to the block grant, Peter will also receive family maintenance paid directly by his diocese which is poolable.

Because Peter is in Band 1, his diocese will receive three years of block grant funding even though Peter has completed his studies in two. His pathway choice is not relevant here, as it his age which determines the block grant amount. Overall, Peter's sponsoring diocese will receive a block grant from the Archbishops' Council totalling £47,259 paid in nine termly instalments. However, as Peter is only studying for two years, his training only costs his diocese £28,944. This means Peter's diocese would have a surplus from the Block Grant of £18,315 which is more than enough to pay for a year's education, accommodation and maintenance for another ordinand.

The diocese would use this surplus on the education of their other ordinands, either in the same year or in subsequent, but only for approved pathways at accredited institutions.

Example Two: How dioceses can spend surpluses on other ordinands

Rachel is 45 and married. As she is aged between 40 and 54, Rachel is in Band 3. A Block Grant of £6,777 would therefore be paid to her sponsoring diocese each year for three years.

Like Peter, Rachel is also training on a two year full-time residential pathway. However, because she is in a higher age band, the block grant funding her diocese receive is not as high. This is because the block grant amount is dependent upon the age of the ordinand, not their pathway.

For each of these two years, the TEI charges £8,760 in tuition fees and £3,318 for her married accommodation allowance. Rachel receives £1,662 each year as a personal allowance, £468 as a short vacation allowance and £528 in her first year as a long vacation allowance. Separate to the block grant, Rachel will also receive family maintenance paid directly by her diocese which is poolable. Overall Rachel's sponsoring diocese will receive a block grant from the Archbishops' Council totalling £20,331, which would be paid in nine instalments. However, as Rachel is studying for two years at a residential college, her training costs her diocese £28,944. This means Rachel's diocese would have a deficit from the Block Grant of £8,613.

The diocese would pay for this shortfall using the money they have accumulated from cases where the block grant has generated a surplus, either in the same year or in previous years. For example, from the £18,315 surplus generated by Peter. Additionally, as a Band 3 ordinand, contingency funding may be available to support Rachel's training depending upon the overall cashflow status of the diocese. Alternatively, the diocese could run a deficit in anticipation of future surpluses.

Example Three: Non-residential pathways

Jessica is 35 and married. As an ordinand aged between 32 and 39, Jessica is in Band 2. A block grant of £15,753 would therefore be paid to her sponsoring diocese in termly instalments for two years.

Jessica is training on a three year full-time non-residential pathway. For each of the three years, the TEI charges £7,305 in tuition fees. Meanwhile, Jessica receives £1,206 each year as a personal allowance from the diocese, along with her travel expenses which are expected to average £1,098. Separate to the block grant, Jessica will also receive family maintenance paid directly by her diocese and which is poolable, with the exception of a transitional charge.

Overall Jessica's sponsoring diocese will receive a block grant from the Ministry Division of £31,506, which would be paid in six instalments. It is not relevant that she is following a non-residential pathway rather than a residential, as the block grant is based on her age rather than her pathway. For the same reason, her diocese will only receive block grant funding for two years, despite her pathway being three years.

However, as Jessica's fees total costs at £28,827 are lower than the block grant she generates, her diocese would have a surplus from the Block Grant of £2,679 which they should then spend on the training of other ordinands, either in the same year or in subsequent.

Example Four: Residential travel allowances

James is a single ordinand on his final year of a full-time residential pathway. He lives 125 miles from his TEI. He receives a personal allowance of £1,662, a short vacation allowance of £468 and a travel allowance of £369, making a total payment of £2,499. As he is in his final year, he will not receive a long vacation allowance.

Christine is a single ordinand on her second year of a full-time residential pathway. She has an income from savings of £3,000 per annum and lives 75 miles from her TEI. She would receive a personal allowance of £1,662, a short vacation allowance of £468, a long vacation allowance of £528 and a travel allowance of £279 totalling £2,937. However, her income from savings of £3,000 mean that Christine's allowances will be reduced by £975 (60% of difference between £3,000 and £1,375) to £1,962.

Example Five: Non-residential and regional travel allowances

Zac is an ordinand following a full-time non-residential pathway. He lives 30 miles from his TEI. He will receive a personal allowance of £1,206 and an initial travel allowance of £270. Zac's actual travel costs are £970. When he has completed his travel expense form claiming £970, the £270 will be used to reduce the amount of travel expense paid to £700.

Ben is an ordinand on a regional part-time pathway. He has a net personal income (after tax) of £50,000. He therefore does not receive a book grant, but would still be eligible for travel expenses.



6. Timing of block grant payments

6.1 Preliminaries

Before the block grant can be paid, we need to know the number and ages of ordinands a diocese is sending, as well as where and what they will be studying. Dioceses will only receive block grant funding for ordinands following approved pathways at accredited institutions. Please follow the steps below:

1. Confirm pathway

Once a candidate has been recommended by a bishop's advisory panel, the diocese, TEI, and ordinand should work together to establish which pathway the ordinand should follow and when training should begin. The final decision on pathway choices is made by the sponsoring bishop.

2. Inform Ministry Division

After agreeing the ordinand's pathway, the TEI and diocese together complete a Confirmation of Ordination Training form (COT). The diocese returns copies of this to Ministry Division and to the TEI. We recommend you complete the COT form as soon as the ordinand's pathway is agreed and no later than **1st September**.

It is essential the COT form is completed on time, as the block grant can only be used to support the training of an ordinand for whom we have received an appropriate COT form. We will check the COT and confirm to both the diocese and the TEI that the block grant will be paid. The COT form covers the full duration of funding, so only needs to be completed for ordinands entering training.

3. Confirmation from Ministry Division of block grant

We will confirm to each diocese how much they will receive through the block grant, over what period, and in relation to which ordinands, by the end of the first full week of September. This will also include continuing students who began training in September 2017.

Each diocese will receive a schedule for the termly payments anticipated over the next year according to age band guidelines.

We will also confirm with each TEI the ordinands they have and from which dioceses, based on the valid COTs we have received for 2017 and 2018.



Summer

September

Other issues

1. **Change of TEI:** A new COT must be prepared by the diocese and TEI and sent to Ministry Division. This is likely to require individual pathway approval. The new TEI should include an appropriate termly charge for this ordinand in their next invoice to the diocese. There is no change in the payment of the block grant.
2. **Suspension of training:** The TEI and Diocese must advise Ministry Division immediately and the next termly Block Grant payment to the diocese will be adjusted accordingly as will the next termly invoice from the TEI. Payment of the remaining block grant for this ordinand will resume when Ministry Division have been advised of the ordinand's recommencement of training.

6.2 Termly payments

The block grant is paid termly. Dioceses are paid an aggregate based on the COT forms we have received by the 1st of September. Together with the block grant for those who started in September 2017 for whom we received COT forms in 2017.

Should a COT form be completed late, adjustments will be made to the spring term payment. In such circumstances it is for the diocese and TEI to agree payment arrangements.

1. Payment to dioceses

We will pay each diocese the aggregate block grant for each term. The autumn term block grant will arrive at the start of the final week of September, spring term by the last full week of January, and summer term by the last full week of April.

Upon receipt, dioceses must pay the money into a restricted Training for Ministry Fund.

2. Preparation of invoices by TEIs

TEIs should invoice dioceses for termly tuition costs, as well as for the single or married accommodation allowances for ordinands training residentially.

Payment terms for autumn term should be by the end of September, spring term by the end of January, and summer term by the end of April.

3. Diocese pays TEI and ordinand

Dioceses should pay TEIs in response to invoices received using their Training for Ministry Fund, which is where the block grant will have been paid into.

Dioceses should also pay the necessary personal allowances, book grants, and initial travel grants to ordinands from their Training for Ministry Fund. The timing of these payments is at diocesan discretion, but we would recommend aligning with the start of term.

4.3 Monitoring and review

By the end of September, each diocese should provide us with an analysis of how they have spent the block grant in terms of ordinands, pathways, personal allowances, travel costs, and receipt of any specific contingency funding for the preceding academic year, and a forecast of how they will spend it in the next academic year. Every diocese should submit a block grant usage form detailing how their block grant was spent by the end of September. An example and guidance is provided in Appendix F.

September/
January/
April

End of
September/
January/
April

Start of
term

September

Other issues (continued)

- Withdrawal from training completely:** The TEI and Diocese must advise Ministry Division immediately and the next termly block grant payment to the diocese will be adjusted accordingly as will the next termly invoice from the TEI. If an ordinand has partially completed a term's training it is expected that this termly grant will be paid in full to the diocese and the TEI will be entitled to payment of the full term's cost.
- Payment of Contingency Funds:** Contingency funding for Band 3 ordinands will be paid alongside the termly block grant. Contingency funding for travel expenses will be paid in the autumn term following completion of the academic year when travel costs are known.

7. Cashflow Implications

In 2017 dioceses appear to have been cautious in their choices. The result is that over the three years of that cohort 31 dioceses are expected to have an overall training fund surplus and 12 dioceses are expected to have a training fund deficit. For the 2017 cohort, an aggregate 9% of block grant funds have not yet been allocated by dioceses to training. As you work with your 2018 ordinands on pathway choices, these surplus funds provide a useful addition to the funds you will receive from September and thus provide more flexibility to meet your ordinands' training needs.

We urge you to feel more confident in your usage of this funding in the coming year and to make every effort to invest any money left over from 2017 into the training of your ordinands for the 2018/19 cohort. Please remember that the block grant must only be spent on approved IMEI pathways at accredited TEIs, that it can be spent across ordinands and cohorts, that dioceses will receive funding for Band 1 and Band 3 ordinands in the third year even if they are doing a two year pathway, that the most common pathway used to determine block grant amounts is not a prescription of which pathway should be followed, and that contingency funding is available to support Band 3 ordinands on residential pathways.

7.1 What happens if there is a cashflow surplus in one year?

If a diocese records a cashflow surplus for a particular year it should be used to increase reserves in its Training for Ministry fund and then spent on the training of future ordinands. In 2017, 22 dioceses recorded a cashflow surplus. On the basis of 2017/18 expenditure it seems likely that deficits occur in earlier years, with increasing surpluses in years 2 and 3 of a cohort. However, Year 3 for one cohort will of course coincide with Years 1 and Years 2 of other cohorts, so the cashflow impacts should balance out. At the annual monitoring review of the RME process any consistent surpluses or deficits will be identified and appropriate action recommended.

7.2 What happens if there is a cashflow deficit in one year?

If a diocese records a cashflow deficit in a particular year it can draw from previously built up surplus reserves in its Training for Ministry fund or alternatively source it from its own funds. It may also be possible to make use of contingency funding for Band 3 ordinands (see Section 8.3) to reduce the size of the deficit during the transition period. In 2017 20 dioceses recorded a cashflow deficit.

Example Six: The diocesan aggregate block grant

An illustrative diocesan cashflow including the first three worked examples is provided on page 19.

The key points to note in this illustration are:

- A total of £619k is paid in block grant over three years with the amounts in Years 1 and 2 being more than that received in Year 3 which relates only to those ordinands in Band 1 and Band 3.
- Overall there is a cashflow surplus of £57k across the cohort of twenty ordinands. The majority of this is generated in the third year, reflecting the impact of Band 1 and 3 ordinands studying for fewer years than their funding allows for.
- Eight ordinands have followed a pathway that is more expensive than the block grant generated according to their age and ten ordinands have followed a pathway that is less expensive.

Diocese of Southbury - An Illustrative Diocesan Cashflow

Ordinand Name	Marital Status	Age	Band	Years grant payable	Block Grant			Training Pathway (TEI Type)	Course Length (Years)	Annual Anticipated Costs 2018/19				Differences			Aggregate Difference	
					2018/19	2019/20	2020/21			Tuition	Accom	Personal Allowances & Res travel	Non-Res & Regional Travel	Total	2018/19	2019/20		2020/21
Ex1 Peter	Married	26	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Residential	2	£8,760.00	£3,318.00	£2,658.00	£0.00	£14,736.00	£1,017.00	£1,545.00	£15,753.00	£18,315.00
Ex2 Rachel	Married	45	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	2	£8,760.00	£3,318.00	£2,658.00	£0.00	£14,736.00	£7,959.00	£7,431.00	£6,777.00	£8,613.00
Ex3 Jessica	Married	35	2	2	£15,753.00	£15,753.00	£0.00	Full Time Non Residential	3	£7,305.00		£1,206.00	£1,098.00	£9,609.00	£6,144.00	£6,144.00	£9,609.00	£2,679.00
Kenneth	Single	42	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	2	£8,760.00	£5,493.00	£2,925.00	£0.00	£17,178.00	£10,401.00	£9,873.00	£6,777.00	£13,497.00
Joshua	Married	55	4	2	£6,777.00	£6,777.00	£0.00	Regional Course	3	£6,087.00		£318.00	£372.00	£6,777.00	£0.00	£0.00	£6,777.00	£6,777.00
Elizabeth	Single	47	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Non Residential	2	£7,305.00		£1,206.00	£1,098.00	£9,609.00	£2,832.00	£2,832.00	£6,777.00	£1,113.00
Jonathan	Married	28	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Residential	3	£8,760.00	£3,318.00	£2,658.00	£0.00	£14,736.00	£1,017.00	£1,017.00	£1,545.00	£3,579.00
Jessica	Married	35	2	2	£15,753.00	£15,753.00	£0.00	Regional Course	3	£6,087.00		£318.00	£372.00	£6,777.00	£8,976.00	£8,976.00	£6,777.00	£11,175.00
Fiona	Single	22	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Residential	3	£8,760.00	£5,493.00	£2,829.00	£0.00	£17,082.00	£1,329.00	£1,329.00	£801.00	£3,459.00
William	Civil Partnership	38	2	2	£15,753.00	£15,753.00	£0.00	Regional Course	3	£6,087.00		£318.00	£372.00	£6,777.00	£8,976.00	£8,976.00	£6,777.00	£11,175.00
Christopher	Single	27	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Non Residential	3	£7,305.00		£1,206.00	£1,098.00	£9,609.00	£6,144.00	£6,144.00	£6,144.00	£18,432.00
Darius	Married	52	4	2	£6,777.00	£6,777.00	£0.00	Regional Course	2	£6,087.00		£318.00	£372.00	£6,777.00	£0.00	£0.00	£0.00	£0.00
Joseph	Married	41	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	2	£8,760.00	£3,318.00	£2,658.00	£0.00	£14,736.00	£7,959.00	£7,431.00	£0.00	£15,390.00
Danel	Single	24	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Non Residential	3	£7,305.00		£1,206.00	£1,098.00	£9,609.00	£6,144.00	£6,144.00	£6,144.00	£18,432.00
Alison	Married	30	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Residential	2	£8,760.00	£3,318.00	£2,658.00	£0.00	£14,736.00	£1,017.00	£1,017.00	£15,753.00	£17,787.00
Timothy	Married	46	3	3	£6,777.00	£6,777.00	£6,777.00	Regional Course	3	£6,087.00		£318.00	£372.00	£6,777.00	£0.00	£0.00	£0.00	£0.00
Brian	Married	25	1	3	£15,753.00	£15,753.00	£15,753.00	Full Time Non Residential	3	£7,305.00		£1,206.00	£1,098.00	£9,609.00	£6,144.00	£6,144.00	£6,144.00	£18,432.00
Edward	Married	52	4	2	£6,777.00	£6,777.00	£0.00	Full Time Residential	1	£8,760.00	£3,318.00	£2,130.00	£0.00	£14,208.00	£7,431.00	£6,777.00	£0.00	£6,540.00
Helen	Single	48	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	2	£8,760.00	£5,358.00	£2,658.00	£0.00	£16,776.00	£9,999.00	£9,471.00	£6,777.00	£12,693.00
Edward	Single	38	2	2	£15,753.00	£15,753.00	£0.00	Full Time Residential	2	£8,760.00	£5,493.00	£2,829.00	£0.00	£17,082.00	£1,329.00	£1,857.00	£0.00	£3,186.00
Totals					£234,276.00	£234,276.00	£150,933.00			£154,560	£41,745	£34,281	£7,350	£237,936	£3,660.00	£12,660.00	£47,850.00	£56,850.00

Note: Personal and travel costs are shown at the average level. Actual costs will depend upon ordinand circumstances.

8. Managing the Transition

8.1 The three year transition period

A three year transition period is underway from September 2017 to 2020 for adoption of the full RME arrangements. During this period the implementation of RME is being carefully monitored to avoid transitional turbulence as far as possible.

RME arrangements only apply to ordinands who began training in September 2017 or afterwards. Students who started training before 2017 continue to be funded by the Archbishops' Council directly under the old arrangements. Each year the new cohort of ordinands will be funded by the block grant, meaning a diminishing number of ordinands under the old system.

We anticipate that over time the block grant may be applied to all approved training components. However for the transitional three year period to September 2020 the block grant can only be spent on IMEI pathways. This is without prejudice to future discussion and decisions as to how IME2 will be funded.

8.2 Outcome of 2017 annual review

In each year of the transition period the Ministry Council holds an annual review of the RME financial arrangements. It is an important component of the wider review of ministerial education undertaken by the Ministry Council, typically at their November meeting. This enables us to identify any unforeseen consequences of the changes during the transition period and make any necessary adjustments.

At the November 2017 RME review, the Ministry Council noted the successful implementation of the new financial arrangements, and agreed to the following:

1. To encourage dioceses with surpluses to make use of this money, by spending it on the training of other ordinands.
2. To clarify that block grant funding can be used for students continuing on an IMEI pathway, even after being ordained.
3. To authorise the Finance Panel to increase contingency funding for travel costs if needed.
4. To increase contingency funding for Band 3 ordinands (aged 40-54) from the September 2018 entry so that 100% (instead of 50%) of the costs of training paid in addition to the block grant by dioceses in cashflow deficit can be provided from contingency funds.



8.3 Contingency funding for Band 3 ordinands

The block grant amounts are based on the most numerous pathway choice followed by ordinands in a particular age band. For Band 3 (40-54) this is a three year regional part time course. However, in 2017/18 the difference between the number of ordinands following this pathway and other pathways was relatively small. In particular, 50 fewer followed a two year full-time residential pathway.

The consequence of having such a small gap between these pathways is that this is the age band where pathway choices are most likely to be limited by financial factors. Contingency funding from central Archbishops' Council funds meant this risk was mitigated during 2017/18.

Contingency funding works by providing a top up to meet the difference between the RME block grant and the actual cost of following a two year full-time residential pathway for Band 3 ordinands in net cashflow deficit dioceses only. In the first year of RME we set this at 50% of the difference, and 15 ordinands from 7 dioceses were supported in this way. As part of the 2017 review, Ministry Council decided to extend the benefit of contingency funding to cover 100% of the difference.

Access to contingency funding is dependent upon the diocese meeting the criteria below:

1. The diocese has a cashflow deficit over the anticipated three year period for the cohort beginning that academic year
2. The diocese still has a cashflow deficit over the anticipated three year period after taking account of the current balance of the diocesan Training for Ministry fund.
3. The funding relates only to Band 3 ordinands following a two year residential course.
4. The pathway choice is acknowledged as the best route for the ordinand, based upon a review of the Candidate Formation Plan.
5. The diocese funds the differential between the block grant and the ordinand's training costs.
6. An application is made to Ministry Division by the end of September using the Transition Contingency Claim Form at Appendix D for 100% refund of the differential.

Example Seven: Taking advantage of Band 3 contingencies

Janet and Kevin are both ordinands in the Diocese of Westbury. Janet is a married ordinand in Band 3 who will generate a block grant of £20,331 (3 x£6,777) and who follows a two year residential pathway costing £28,944 (£14,736+£14,208). Thus her training choice leads to a block grant deficit of £8,613 over the three years. Kevin is a single ordinand in Band 3 who will generate a block grant of £20,331 and who follows a two year residential pathway which costs £33,294 (£16,911+£16,383). Thus his training choice leads to a block grant deficit of £12,963 over the three years.

Both Janet and Kevin are sponsored by Westbury Diocese, and for the given cohort of ordinands starting training there is a cashflow deficit over the three year period, which means the diocese would be able to draw on contingency funding. The diocese would be expected to pay the full residential costs for the two years of Janet and Kevin's training.

The contingency fund would provide 100% of the total differential in this case 100% of £21,576. The cashflow deficit occurs over the two years of residential training, so contingency provision would be spread across the two years as well i.e. in this case £10,788 in 2018/19 and a similar amount in 2019/20. This contingency funding will be paid to the diocese termly alongside the Block Grant, in this case £3,596 per term.

8.4. Support for travel costs for regional part-time and non-residential full-time courses

Average travel allowances for 2018/19 have been calculated as £1,098pa for non-residential full-time ordinands and £372pa for regional part-time ordinands. These are based on the average claims of ordinands in that category for 2017/18 as advised by diocese in spring 2018. The regional travel average is incorporated in the calculation of the block grant for Band 3 and Band 4 ordinands.

As with all averages, a number of dioceses have indicated that, given their geographic position and availability of local TELs, this is likely to be insufficient for their ordinands' needs. Therefore for the transition period and reviewed on an annual basis, we have made contingency funding for travel support of up to £200 per ordinand per annum available in the following circumstances:

1. The diocese has a cashflow deficit over the anticipated three year period for the cohort.
2. The diocese still has a cashflow deficit over the anticipated three year period after taking account of the current balance of the diocesan Training for Ministry fund.
3. The diocese still has a cashflow deficit over the anticipated three year period after allowing for the receipt of any Band 3 contingency funding.
4. The contingency funding relates only to Band 3 or Band 4 ordinands following regional or non-residential courses. It is expected that any greater than average travel expense from these pathways for Band 1 or Band 2 can be covered by the Block Grant they generate.
5. The diocese funds at least 50% of the aggregate differential between the Block Grant and the travel costs for ordinand on regional part-time and non-residential pathways.
6. An application is made to Ministry Division by the end of September of the year following that in which the expenditure was incurred.

8.5 The non-poolable charge for ordinands on full-time non-residential courses

During the three year transition period a non-poolable charge is applied to maintenance payments for full-time non-residential ordinands. The charge will taper from £3k per ordinand in 2017/18 to £1k in 2019/20 and then end. The diocese will be permitted to recover the charge from its block grant should there be sufficient surplus funds. Confirmation is currently being sought from these dioceses which wish to apply the charge to their 2017/18 surplus. The charge for all full-time non-residential ordinands in 2018/19 will be £2,000.

8.6. Formal end of transition review

There will be a full review by Ministry Council in November 2020 at the end off of the new arrangements, at which point any necessary adjustments can be made.

The end of transition review will consider the evolution of the system and its outcomes in the preceding three years. It will be an opportunity for us to take a more strategic perspective and focus on the extent to which the changed financial arrangements have supported the growth and development of the ministerial education sector and met the RME objectives.

9. Other elements of the financial framework

Many of the remaining elements of the financial framework for ministerial education have not changed under RME. However, for completeness, the way in which these elements will continue to be funded from September 2018 and onwards are laid out below:

9.1 Ordinands who started training before Autumn 2017

The RME changes only apply to ordinands entering training from Autumn 2017. For ordinands already in training, arrangements for funding and everything else relating to their training are unchanged. By September 2020, all ordinands will be funded through the block grant. The tuition fees and related allowances that will pertain for continuing ordinands are the same as those for new ordinands.

9.2 Family maintenance

The latest version of *Financial Support for Ordinands in Full Time Training* guidelines was released in June 2018 and is available on the Church of England website. This booklet covers maintenance arrangements for all ordinands in full time training.

9.3 University fees

There will continue to be payments made by Ministry Division to TEIs for university fees as now. This continues to apply both when ordinands are undertaking a Common Awards programme and when they are undertaking a university award which is an approved exception to Common Awards.

9.4 Higher cost pathways

There is no change to the way in which the additional cost of higher cost pathways (e.g. Cambridge Tripos or Oxford BA) are funded. Ordinands will still generate block grant funding according to their age which will be used to fund their training. The central Training for Ministry budget will continue to be used to share with the TEI the additional tuition and related costs up to £4.5k.

9.5 Research degrees

Central funding is available for research degrees. However the Research Degrees Panel expect that at least the equivalent of two years residential funding from the block grant has already been spent on ordination training for the candidate or will be contributed from the block grant towards the cost of the research degree before any further funding is considered.

9.6 Disability and dyslexia support

Ministry Division provide financial support for ordinands with dyslexia and disabilities. TEIs are legally required to make reasonable adjustments to support training. Dioceses and TEIs are expected to secure funding from all available sources such as the Disabled Students Allowance (applications can be made online through gov.uk) before approaching Ministry Division.

9.7 Candidates Panel

Candidates Panel will continue to exist, and its approval will be needed for an ordinand to re-enter training after a withdrawal lasting three months or more (amongst other things). However approval for ordinands to undertake non-standard pathways now comes from the Individual Pathways Panel.

Length and mode of training is no longer restricted by age, so no application is necessary for ordinands to undertake training that would be more expensive than is typical for an ordinand of that age – and, as a result, the ‘Gathered Field’ will no longer exist. However no additional funding is available for such candidates beyond the Block Grant.

9.8 The Train a Priest Fund (TAP)

The standard TAP grants have for many years been made available as a result of generous donations from readers of the Church Times. In recent years the funding provided to ordinands in this form has effectively become a subsidy to dioceses from Central funds since the Church Times appeal has provided insufficient receipts to cover these standard payments.

In order to target its TAP funding more effectively, the Church Times has decided that from September 2018 all TAP funds raised will be targeted towards the TAP Special Hardship Fund which will enable it to make a tangible and specific contribution where there is a real financial need. Accordingly there will be no standard TAP grants for ordinands starting in September 2018.

9.9 Ecumenical Funding

Funding is provided for ecumenical study abroad for ordinands, on consideration of an application from the TEI. The appropriate tuition fee and related accommodation costs of the placement will be paid by Ministry Division from central funds. The accommodation element that would have been paid to the British TEI will be recovered from the block grant by Ministry Division.

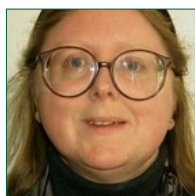
10. Appendices and contacts

Appendix A	COT Form (EXAMPLE)	Page 26
Appendix B	Confirmation of Block Grant Payment - Ordinand (EXAMPLE)	Page 27
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Appendix D	Transition Contingency Claim Form for Band 3 Ordinands (EXAMPLE)	Page 29
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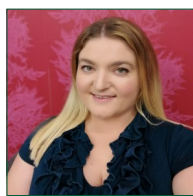
Contacts

Ministry Division staff are always happy to offer support and advice, so please don't hesitate to get in touch.

For general enquires please contact grants@churchofengland.org.



Sarah Evans
Grants and Finance Officer
sarah.evans@churchofengland.org
0207 898 1394



Tarryn Gilfroy
Finance and Data Administrator
tarryn.gilfroy@churchofengland.org
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Appendix A

COT Form (EXAMPLE)

Confirmation of Ordination Training

Name of candidate: Jane Wilson
Date of birth: 21/3/1980
Sponsoring diocese: Barchester
Training Institution: St Matthias

To be completed by Training Institution

Start date: September 2018			
Length: 2 years			
Pathway (e.g. 3 year context based BA, 2 year Graduate Diploma): Graduate Diploma and other modules agreed with diocese, including some at Northern Pioneer Centre			
Mode (for funding purposes - e.g. non-residential; full-time residential, full-time context based): Full-time context based			
Please select one of these options	This is one of the TEI's standard validated pathways	<input checked="" type="checkbox"/>	This pathway has been given individual approval
	Approval for this pathway is pending	<input type="checkbox"/>	This pathway is not eligible for funding from the diocese's block grant
Additional notes:			
Name of person completing form: Mark Johnston			
Position and contact details: Admissions Officer - m.g.johnston@stmatthias.ac.uk 01222 123456			
Date: 24/4/18			

Please email this form to the candidate's diocese

To be completed by DDO or other diocesan official

We agree to the candidate undertaking the above training, and (unless otherwise indicated) to funding it in accordance with current Ministry Division guidelines.

Name: Rachel McMahon
Position and contact details: DDO - ddo@barchester.anglican.org 01333 987654
Date: 27/4/18
Legal entity for invoicing: Barchester Diocesan Board of Finance
Contact name and address for invoicing: Roger Brown Diocesan House Barchester BCI IAZ
Additional notes:

Please email the form back to the Training Institution, copied to the candidate and to Ministry Division (training.accept@churchofengland.org)

Appendix B

Confirmation of Block Grant Payment - Ordinand (EXAMPLE)

Confirmation of Payment of Block Grant Ordinands entering training September 2018

Name	Jane Wilson
Band	2
Diocese	Barchester
Training Institution	St Matthias
Date	28 th July 2018

This is to confirm that a Confirmation of Ordination Training has been received for this candidate and a Block Grant will be paid in respect of her/him at the rates below in accordance with current Ministry Division Guidelines.

Age Range	Band	Block Grant for 2018/19 (£)
<32	Band 1	15,753
32-39	Band 2	15,753
40-54	Band 3	6,777
55+	Band 4	6,777

Ian Barnetson
Head of Resources
Ministry Division

Appendix C

Confirmation of Block Grant Payment - Diocese (EXAMPLE: First Term Confirmation)

Confirmation of Block Grant payment 1st Term 2018/19 - Barchester										TAP Fund and equivalent grants 2018/19	
Name	Date of Birth	Training Date Start	Sponsoring Diocese	Age at Start of Training	Band	Block Grant for 2018/19	Block Grant for 2018/19 1st term (£)	TAP Fund and equivalent grants 2018/19 (£)*	TAP Fund and equivalent grants 2018/19 1st term (£)*		
2018 starters											
Pugh, John	16/02/1966	01/09/2018	Barchester	52	4	6,777	2,259				
Graves, Julie	05/01/1988	01/09/2018	Barchester	30	1	15,753	5,251				
Isles, Harry	19/12/1968	01/09/2018	Barchester	49	3	6,777	2,259				
Phont, Natasha	17/04/1985	01/09/2018	Barchester	33	2	15,753	5,251				
2017 starters											
Dean, Tracey	21/03/1980	01/09/2017	Barchester	37	2	15,753	5,251	354	118		
Canon, Jane	31/07/1972	01/09/2017	Barchester	45	3	6,777	2,259	951	317		
Bishop, Peter	15/09/1975	01/09/2017	Barchester	41	3	6,777	2,259	525	175		
Knave, Guy	17/12/1979	01/09/2017	Barchester	37	2	15,753	5,251	951	317		
Total Funding 1st Term 2018/19										30,040	927

£30,967 will be sent by BACS to reach your account by 26th September 2018

* For those who started September 2017 only

Appendix D

Transition Contingency Claim Form for Band 3 Ordinands (EXAMPLE)

2018/19 Transition Contingency Claim Form

Please insert all details for Band 3 ordinands for whom you are claiming the contingency funding support

Name	Marital Status	Age	Band	Years Grant Payable	Block Grant			Training Pathway (TEI type)	Training Pathway (TEI Name)	Course Length (Years)	Annual Anticipated Costs 2018/19				Aggregate Difference			
					2018/19	2019/20	2020/21				Tuition	Accom	Personal	Travel		Total	2018/19	2019/20
Rachel Jones	Married	45	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	Cranmer Hall, Durham	2	£8,760.00	£3,318.00	£2,703.00	£0.00	£14,781.00	-£8,004	£6,777	-£ 9,231
Kenneth Smith	Single	42	3	3	£6,777.00	£6,777.00	£6,777.00	Full Time Residential	Ridley Hall, Cambridge	2	£8,760.00	£5,493.00	£2,703.00	£0.00	£16,956.00	-£10,179	£6,777	-£13,581
Totals					£13,554.00	£13,554.00	£13,554.00				£17,520	£8,811	£5,406⁽¹⁾	£ -	£31,737	-£18,183	£13,554	-£22,812

Training for Ministry Fund	
Aggregate Cashflow deficit 2018- 2021	-£19,233 ⁽²⁾
Cashflow deficit for selected ordinands	-£22,812
Annual expected deficit for 2 year training	-£11,406 ⁽³⁾
Contingency Claim for 2018/19	£11,406⁽⁴⁾

1. Personal allowances are shown at the average level. Actual personal allowance will depend upon ordinand circumstances
2. Sourced from diocesan 2018/19 Block Grant Utilisation submission form
3. Deficit reflects 2 years of training
4. Claim to Central Funds for 100%

Appendix E

Travel Expense Claim Form

APPLICATION FOR REIMBURSEMENT OF TRAVEL EXPENSES

Name _____ Course _____
 (block letters)

Address _____

Please enter the journeys undertaken in connection with your course. Claims are normally submitted at the end of each academic year, but may be submitted on a termly basis if preferred. Please provide descriptions of all journeys made including mode of transport, start and finish points, mileage distance if driving, and reason for travel. If taxis have been used please state why other transport was not possible.

You may group journeys together into weekday class sessions, residential weekends, placements, summer schools, etc. (e.g. 10 week-day class sessions in Salisbury, round trip 36 miles, total = 360 miles). Mileage up to 5,000 miles is paid at 30p per mile and over 5,000 miles is paid at 20p per mile.

Reimbursement of expenses is after the deduction of any initial travel advance and if the claim is for less than the initial travel advance there will be nothing to be paid to you at that stage.

The form should be counter-signed by your Course Principal or Vice-Principal and sent to your appropriate Diocesan Officer.

Autumn Term	Public transport or	Mileage
Total		

Spring Term

	Public transport or	Mileage
Total		

Summer Term

	Public transport	Mileage
Total		

Total Year		
------------	--	--

Signature of ordinand _____

Signature of Principal or
Vice-Principal _____

Office use only:		
Mileage _____ m @ 20.0p	£	.
Mileage _____ m @ 30.0p	£	.
Public transport	£	.
Initial grant	£	.
TOTAL	£	.

Please ensure that claims being made at the end of the academic year are submitted by December at the latest

Appendix F

Diocesan Block Grant Usage Form 2018/2019 (EXAMPLE)

Instructions for Dioceses for completion of Block Grant Utilisation 2018/19 and 2017/18 templates

Each diocese should complete the block grant utilisation template for all ordinands beginning training in September 2018. The template provides for the details of 15 ordinands. Should more rows be required please insert as needed. The template provides drop down and pre filled data for convenience and consistency. A similar form should be completed for September 2017 starters and can be found below the 2018 template. Column references refer to the excel spreadsheet available online.

Column A	Select the name of the diocese from the drop down menu.
Column B	Enter the name of the ordinand.
Column C	Select the marital status of the ordinand from the drop down menu.
Column D	Enter the age of the candidate at September 1 st 2018.
Column E	Enter the age band (from 1 to 4) for the ordinand. This will also populate columns F, G, H and I and thus calculate how much block grant will be received by the diocese in each of the 3 years.
Column J	Enter the pathway type from the dropdown menu. This will also populate columns M and if full time non-residential or regional it will also populate column P.
Column K	Enter the particular TEI from the dropdown menu.
Column L	Enter the number of years the ordinand will be training at the TEI regardless of the block grant banding
Column N	For full time residential students only, enter either the single or married accommodation allowance from the dropdown menu. For all other ordinands select zero.
Column O	Enter the total personal allowance paid to the ordinand in accordance with the guidelines and the personal circumstances of the ordinand. The travel allowance for full time residential ordinands should be included in this total.
Columns P	This will be prefilled for full time non-residential and regional ordinands. At the end of the academic year these figures can be updated to take account of actual travel expenditure.
Column Q	The expected annual training costs for the ordinand will be automatically calculated.
Columns R/S	The expected difference between block grant received in 2018/19 and 2019/20 and the ordinand training costs will be automatically calculated.
Column T	This is the difference between the block grant received in 2020/21 and the cost of training in that year. <i>It needs to be manually calculated.</i> If the ordinand is in Band 1 or Band 3 there will be a block grant paid in 2020/21 and obviously costs will only be incurred in that year if it is a 3 year training course. Long vacation allowances are not paid in the final year of training.
Column U	This automatically calculates for each candidate the total difference between block grant and training expenditure

The opening balance for September 2018 should be completed as the outcome of the first year's block grant account balance from the September 2017 starters.

Please return the completed form to grants@churchofengland.org by September 30th 2018.

Should you have any questions at this stage please contact ian.barnetson@churchofengland.org.

September 2018 starters

Ordinand Name	Marital Status	Age	Band	Years grant payable	Block Grant		Training Pathway (TEI Type)	Training Pathway (TEI Name)	Course Length (Years)	Annual Anticipated Costs 2018/19			Differences		Aggregate Difference	
					2018/19	2019/20				2020/21	Tuition	Accom	Personal Allow & Res travel	Non-Res & Regional Travel		Total
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
Totals					£0.00	£0.00	£0.00		£	-	£	-	£	-	#VALUE!	#VALUE!

Training for Ministry Fund September 2018 starters cohort

Opening Balance 1 Sept 2018	0
Block grant 2018/19	£ -
Anticipated Training expenditure 2018/19	£ -
Closing Balance 31 August 2019	£ -

September 2017 starters

Ordinand Name	Marital Status	Age	Band	Years grant payable	Block Grant		Training Pathway (TEI Type)	Training Pathway (TEI Name)	Course Length (Years)	Annual Anticipated Costs 2018/19			Differences		Aggregate Difference	
					2018/19	2019/20				2020/21	Tuition	Accom	Personal Allow & Res travel	Non-Res & Regional Travel		Total
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
	Please choose						Please choose	Please choose		Please choose			£0.00	#VALUE!	#VALUE!	#VALUE!
Totals					£0.00	£0.00	£0.00		£	-	£	-	£	-	#VALUE!	#VALUE!

Training for Ministry Fund - September 2017 starters cohort

Opening Balance 1 Sept 2018	£
Block grant 2018/19	£ -
Anticipated Training expenditure 2018/19	£ -
Closing Balance 31 August 2019	#VALUE!

Training for Ministry Fund - Total

Opening Balance 1 Sept 2018	£
Block grant 2018/19	£ -
Anticipated Training expenditure 2018/19	£ -
Closing Balance 31 August 2019	#VALUE!