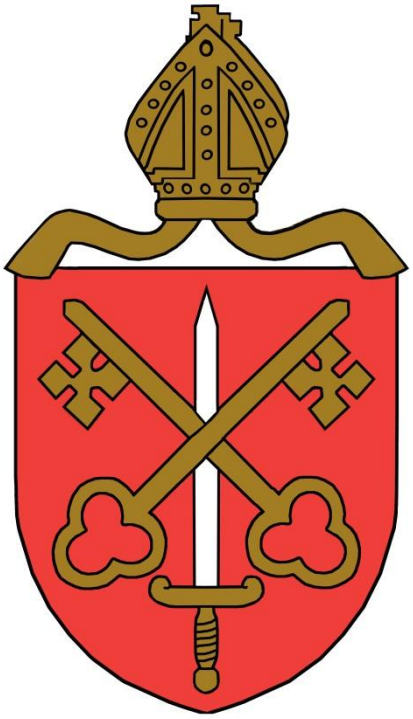
DIOCESE OF EXETER



CATHEDRAL VISITATION

2016

CHARGE

of

ROBERT

Bishop of Exeter

INTRODUCTION

In accordance with the Constitution and Statutes of the Cathedral, and at the request of the Chapter, I directed a Visitation of the Cathedral by letter dated 17th November 2015. Records of episcopal Visitations over the centuries survive, including those of Bishop John Grandisson. In his Charge of 1330 he castigated the Cathedral clergy for their irreverent behaviour. Apparently they had a habit of 'knowingly and purposely throwing drippings or snuffings from their candles' upon the heads of the choirboys in the stalls below 'with the purpose of exciting laughter'. In recent times the last recorded Visitation was undertaken in 1959 by Bishop Robert Mortimer. In 1989 one was begun but not completed by Bishop Hewlett Thompson in an attempt to address the administrative weakness in the Cathedral. Unbelievably by today's standards, as late as 1989 the Cathedral did not have a fulltime administrator.

Today Exeter Cathedral faces a different set of challenges. It stands at the interface of Church and society in new and unexpected ways, but at heart this magnificent gothic building continues to be a place of Christian worship where, to borrow a phrase of T. S. Eliot, 'prayer has been valid'. The Gospel of Jesus Christ is proclaimed with energy and imagination, school parties explore its history, and on Wednesday nights the Cathedral's kitchen reaches out to the homeless. The Cathedral is the mother church of the Diocese, but it is also a major heritage site and tourist attraction with paying visitors. It runs a shop and café, and regularly hosts concerts, exhibitions, lectures and other outside events. It functions through the work of its Dean, its Residentiary Canons and Chapter Canons, the Managing Director, 81 paid lay staff, and around 400 volunteers who serve in a variety of roles. The demands laid upon those responsible for the Cathedral's life and organization are immense.

The main areas explored during this Visitation were Finance, Health and Safety, Safeguarding, and Management, Governance and Leadership. Given the complexity of the organisation, the dispersed nature of the Cathedral community and the scope of the task, I appointed three Episcopal Visitors to undertake the Visitation on my behalf: The Rt Hon the Baroness Butler-Sloss, Dame Rosemary Spencer and Mr Keith Robinson. They made some preliminary investigations in December 2015 and commenced their formal work in January 2016. I am indebted to their wisdom, hard work, perception and advice. Thanks must also be recorded to the Venerable David Gunn-Johnson for his efficiency and energy as clerk, and to Mrs Justine Tear, my Executive Assistant for her generous help throughout the Visitation.

Over five months the Visitors met as many people from the community of the Cathedral as they could, including employees, volunteers and members of the Cathedral's congregations. In total they

conducted 88 interviews: some people were seen individually, others were interviewed by all three Visitors. Each of the Visitors met people as they walked round the Cathedral. They attended services, meetings of the Residentiary Canons, of the Chapter and of the Cathedral Council, as well as the Senior Management Team. In presenting their findings to me, they gave consideration to the responses and representations of various individuals concerned. I am grateful for the recommendations of the Visitors, all of which I have accepted. They form the basis of the directions in this Charge. Over the summer I shared a draft of my Charge with members of Chapter, and with the Chairs of the Cathedral Council and Cathedral Community Committee. I am grateful for their comments which have refined this final text. In presenting this Charge I pray for the flourishing of the Cathedral, mindful of St Paul's exhortation to the Church in Philippi:

'Beloved, if there is any encouragement in Christ, any consolation from love, any sharing in the Spirit, any compassion and sympathy, then make my joy complete: be of the same mind, having the same love, being in full accord and of one mind. Do nothing from selfish ambition or conceit, but in humility regard others as better than yourselves. Let each of you look not to your own interests, but to the interests of others. And let the same mind be in you that was in Christ Jesus.'

(Philippians 2.1-4)

+ Robert Exon

September 2016

1 MISSION, WORSHIP AND PASTORAL CARE

According to its Mission and Values Statement, Exeter Cathedral exists 'for the glory of God and as a sign of God's kingdom. Our mission is growing in prayer, making disciples and serving people in Devon with joy.' The Cathedral expresses this through daily worship and prayer, pastoral support, nurturing disciples, learning together, and serving the community.

The Cathedral is 'committed to and will courageously pursue being welcoming to all, the best we can, open and listening, and fair and respectful.' The statement concludes with a quotation of the prophet Micah: 'What does the Lord require of you but to do justice, love mercy and to walk humbly with your God?' (Micah 6.8)

I affirm and welcome this statement of the mission and values of the Cathedral which was developed during 2015 and I encourage Chapter to be faithful to its vision. Britain is often described as a secular country, but research shows that this is a misnomer. The majority of the population still believe in God or at least in a higher power. What they do not do is automatically to connect their belief with the life of the institutional Church. Society has become culturally more diverse, mobile and informal. It has become more liberal and pluralist, but none of this necessarily equates with being more secular.

In the centuries when the Cathedral was built we can safely assume that most people in Devon had a working knowledge of Christianity. In many quarters this has given way to a mixture of apathy and ignorance of the faith. Our generation mistrusts dogma, but craves the ether of spirituality. This is the context of the Cathedral's mission and witness. There is both challenge and opportunity here, not least because in an era that is ambivalent about organised religion paradoxically many people continue to value our cathedrals. The question is how to capitalise upon their interest and turn visitors into pilgrims, and pilgrims into disciples.

It is vital that Chapter, the Cathedral Council and the College of Canons never lose sight of the primacy of the Cathedral's spiritual calling. In the words of St Benedict, 'Let them prefer nothing to the love of Christ'. Like St Paul, they should 'never be ashamed of the gospel' (Romans 1.16); for 'there is no other foundation on which to build other than that which has been laid: Jesus Christ' (1 Cor.3.11).

1.1 Worship

Although worship lay outside the remit of the Visitation, it is the right place to begin this Charge because the offering of the daily round of worship and prayer is fundamental to the life of the

Cathedral. There is little uniformity across the breadth of churchmanship in the Church of England but there remains a recognisable 'shape' to Anglican worship and a body of wisdom which applies to most, if not all, churches and cathedrals. The menu of worship on offer in Exeter Cathedral is rich, ranging from the solemnity of a Choral Eucharist to the informality of 'Holy Ground' and 'Sundays @ 7'. This diversity is to be welcomed: a cathedral should never be averse to creativity. Whilst being rooted in the Anglican choral tradition, a cathedral should seek to offer a broad palette of worship so that people of different temperaments and spiritualities can find sustenance.

Cathedral worship uses music, movement and colour in the service of God. It offers space and anonymity and attracts those who value privacy rather than fellowship. For some, intimacy with God is not dependent on engagement with others. Others are attracted by the excellence of the music, the quality of the preaching, and a dignified liturgy. Here I record my gratitude to the Director of Music, assistant organists and choir for the quality of the music which does so much to enhance the Cathedral's worship. There is an architectural quality to cathedral liturgy: the building demands it. 'Thou hast set my feet in a large room,' says the psalmist (Psalm 31.8). How do we encourage a new generation to explore the salons and attics of God's mansion?

'O worship the Lord in the beauty of holiness,' is a phrase familiar to most Anglicans. Worship has to strike a balance: it needs to blend the holy with the homely. If people do not feel at home in church, including in a cathedral, the chance of them being sufficiently at ease to encounter the holiness of God, to be receptive to God's Word or the grace of the sacraments is slim. The context set for worship begins with the welcome extended at the Cathedral door. The meeting and greeting of people sets the tone for what follows, as does the personal preparation the clergy bring to the worship they lead, the attention that the musicians bring to their singing, and the unfussy service that vergers and servers provide. How a congregation and visitors are treated at the end of a service will also affect how they remember the occasion.

The ethos of the Cathedral is shaped by these things and by those who lead its worship. Sadly, during the Visitation the Visitors encountered disquiet in some quarters about a perceived loss of devotion and spirituality in the Cathedral's worship. Members of the Sunday morning congregation remarked on the tension among the clergy that is affecting worship and regretted that significant changes of detail to the style of the liturgy 'had been introduced in the order of services without consultation'. If those conducting worship do not consult adequately, fail to communicate a sense of God's presence or who are not at ease with each other, no one should be surprised when a congregation feels discouraged.

A worship audit can be a useful tool in enabling a parish church or cathedral to take stock of its worship and renew its spiritual life. A cathedral can expect to be both changed and challenged by the

exercise, not least by being forced to reflect on the experiences both of its regular congregations and of its occasional visitors. An audit need not be overly burdensome, but it does need to engage with those who do not normally have the confidence to voice their opinions. The exercise costs nothing, but if handled wisely, the conversation within a Christian community which such a review generates can be hugely energising.

I therefore *direct* that Chapter mandate the Canon Precentor, in partnership with the Cathedral's Community Committee, to undertake a worship audit within the next twelve months.

1.2 Apologetics

For many people today it is not the style of worship that matters, but whether the Church has anything relevant to say. Preoccupied with work, with raising a family and with earning enough money, many people do not engage with the claims of the Christian faith. As a result a whole generation is growing up blind to the way Christianity has shaped our laws and culture for good. All perceptions of truth are partial and to an extent provisional, including those of Christians. But this does not mean we should shy away from evaluating competing claims to truth and, in the words of St Peter, 'give a reason for the hope that is in us' (1 Peter 3.15).

Exeter Cathedral, set in a city which boasts a distinguished university with an international reputation, has a particular opportunity to witness in this respect. It is good that, under the direction of the Canon Chancellor, it is endeavouring to develop a co-ordinated catechetical and educational programme that responds to the questions people are asking. The apologetic task is fundamental to our mission. We need to mobilise the whole people of God into life-long discipleship and the Cathedral needs to invest time and energy in discipleship training and adult education.

1.3 Pastoral Care

Good pastoral care should be a hallmark of every church. One of the challenges facing the Cathedral, however, is that its community is a diverse and shifting group of people, not all of whom are resident in Exeter. There are regular members of its congregations, particularly the main Sunday morning congregation, but also members of staff, an army of volunteers and thousands of visitors. All of these have pastoral needs, but they cannot necessarily all be met.

The Constitution and Statutes of the Cathedral set out a duty for the Dean 'to secure the pastoral care of all members of the Cathedral community.' In relation to this the Visitors were 'repeatedly informed that the Dean regularly makes a distinction between the Cathedral and a parish church. He does not make himself felt within the Cathedral during the year to encourage or play a significant role in the

pastoral care of the Community. It appears that he leaves that role to the Canon Pastor.' Whilst recognising that the management of the pastoral needs of the cathedral community is a strategic issue, the Visitors do not recognise the validity of the distinction the Dean makes which they say is unhelpful and has become a bone of contention. The Visitors comment: 'It is worrying that [the Dean] appears to have so little understanding and awareness of the need to nurture the regular congregation which is an important part of the Cathedral's life and its ministry to visitors – and also a source of volunteers and of income.' It became clear to the Visitors that the Dean needs to play a bigger role in the pastoral care of the Community.

The Visitors record the warm appreciation of the ministry of the Canon Pastor. Given the size of the Cathedral Community and its various constituencies, it is important that his ministry is supplemented and facilitated by a network of pastoral care through which people are known and valued, and consequently better able to support one another. A Pastoral Care Team can help foster such a culture of belonging and mutual support. It can also provide a forum to think through strategically the pastoral work of the Cathedral and coordinate it more effectively.

I therefore *direct* that Chapter mandate the Canon Pastor, in partnership with the Cathedral's Community Committee, to establish a Pastoral Care Team.

2 FINANCE

On 31st January 2016 the BBC published the results of a survey which had been undertaken into the financial position of English cathedrals. This showed that of the thirty-eight cathedrals which responded fully to the survey, twenty-six said that they were 'worried' or 'very worried' about the future. Exeter Cathedral is not alone in struggling financially. The accounts of any cathedral show the high costs of maintenance of an historical building, the provision of excellent music and the management and administration of a large visitor attraction – including compliance with a growing set of rules and regulations.

The situation in Exeter is acute because, unlike some other cathedrals, it has no large endowments. It is more dependent than many on its 'operational' income to fund its day-to-day expenditure which approaches £1.5 million a year. Over and above this, the Cathedral Architect and Clerk of Works have identified building-related projects totalling at least £4.2 million over the next ten years. Our thanks go to them and to the Cathedral's team of craftsmen for their skill and expertise.

Enormous credit must be given to the Music Foundation Trust, the Friends of Exeter Cathedral, the Preservation Trust and other trusts for the significant contribution they have made and continue to make towards the well-being of the Cathedral. All are managed well and while some of the Boards of Trustees may be in need of refreshment, this seems to be acknowledged by the trusts themselves and they have the matter in hand. Nonetheless, the contribution from these trusts is limited. For example, the Music Trust funds less than half of the music costs of the Cathedral (nearly £300,000 in total). The rest has to be funded from the operations of the Cathedral.

2.1 Current position

The accounting records, as confirmed by the auditors, are well kept and significant improvements have been made to the Finance function. However, in the view of the Visitors 'the report writing function of the Accounting System is poor.' It seems that only towards the end of 2015 was the gravity of the financial situation explained and understood by Chapter. Even now the Visitors question whether the parlous state of the Cathedral's finances has been fully absorbed into the bloodstream of all the senior personnel. Financial reports invariably contain too much detail and every effort should be made to ensure that they present their key financial messages clearly.

I understand that the current part-time Finance Director is leaving in October. Given the current position of the Cathedral's finances, it is evident that this role is incredibly important. In making a new appointment:

I therefore *direct* that every effort should be made to appoint someone with proven experience of operating at governing body or board level. He or she should have proven experience of developing and maintaining the systems, processes and disciplines needed to keep a firm grip on all aspects of an organisation's finances, and should understand what is needed by way of financial reporting for boards and their committees. Whilst such an appointment could be at a financial cost to the Cathedral – at least initially – over time it should pay for itself through increased efficiency and savings.

2.2 CloistersPlus and New Priorities

The Visitors examined the CloistersPlus project in detail. Originally this included proposals to make the cloisters area into a large covered space to include a Visitors Welcome Centre, Shop and Café and toilets. In addition there were proposals to improve sound, lighting and data infrastructure, space for interpretation and better facilities for staff. During 2014 a much more ambitious project was added to the CloistersPlus programme to re-excavate the remains of the Roman Bath House lying underneath the Cathedral Green. The application for funding made to the Heritage Lottery Fund that was necessary to support the Bath House project was, however, rejected.

The Visitors found that:
'Unsurprisingly, the refusal of Heritage Lottery Fund to support the Roman Baths project has been a devastating blow to the morale of those who enunciated the vision and who worked hard on the project and the application to the HLF. We received a large number and range of comments about the Roman Baths during our Visitation interviews. Some, it has to be said, were in the category of "wise after the event". We have seen little evidence that strong objections to the concept were lodged at the time the project application was being developed. …. But the fact is that the project cost money which will not be recovered. It put back the development of some other projects which would enhance the visitor experience and therefore increase income.'

As a result, the Visitors recommend that Chapter 'should not attempt to restart the Roman Baths project' and say that 'there is an urgent need for Chapter to determine the priorities for the next three to five years' as part of a concerted drive to stabilize the Cathedral's finances.

For the short and medium-term sustainability of the Cathedral, I therefore *direct* that the CloisterPlus programme should be reviewed and that Chapter should not attempt to revive the Roman Bath House project for at least five years. Going forward, Chapter should prioritize its projects, taking into account the need to enhance the visitor experience, the Cathedral's ability to fund individual projects, their income-generating potential, and the capacity of management to deliver them.

I further *direct* that the Business Plan should be completed, approved and owned by Chapter, the Cathedral Council, and all involved in its implementation. The Plan should be strictly implemented to deliver increased income and reduced expenditure.

2.3 Operational Income

The Visitors recommend that management accounts should be prepared for and issued to each Department Head on a monthly basis to monitor financial performance. In the new Business Plan there are some projections of increased contributions from various operational activities in the Cathedral. There have been commendable improvements in recent months and every encouragement should be given to those members of staff and volunteers who are engaged in these activities. However, the Visitors question whether the Commercial Operating Committee, as currently constituted, is the right way to give that encouragement and wonder whether it should be disbanded.

2.4 Fundraising

The Cathedral has every right to be proud of the success of the Third Millennium Campaign which raised the £8 million. This was its original target. The money has been well used including the funding of important fabric repairs (notably the west front and south bell tower), the housing of the cathedral library and archives, creation of a new sacristy, two new Song Schools and music library, and the development of dedicated Education Rooms. The campaign culminated in a Special Service of Thanksgiving attended by the HRH the Prince of Wales and HRH the Duchess of Cornwall in February 2013. The Visitors were impressed by the Development Director's Outline Fundraising Activity Plan for 2016-19 for its detail and imagination. Although the sums involved are much more modest than those of the Third Millennium Campaign, this activity is to be encouraged.

2.5 Operational Expenditure

During a period of testing financial conditions, the control of expenditure is vital. It is essential that the Cathedral lives within its means. In this context the Visitors made two observations, first in relation to the funding of the stipends of the clergy. The Church Commissioners fund three clergy posts: the Dean and two Residentiary Canons. The Visitors observe that: 'In view of the fragility of the finances of the Cathedral, the proposal of the Dean and Chapter in 2015 to change the funding arrangements of the Residentiary Canons and to increase their number by funding the role of Canon Precentor from Cathedral income and the Cathedral School was unwise. It is uncertain whether this additional financial commitment is sustainable.' Secondly, in relation to Cathedral staff, the Visitors advise that 'there is work to be done in streamlining departments, relying less on part-time staff and being more disciplined in the way additional posts are approved.'

I therefore *direct* that when the next vacancy occurs among the stipendiary residentiary canons consideration should be given to reducing their number, returning the funding arrangements to the *status quo ante*, and reallocating portfolios of responsibility.

I further *direct* that over the next five years all staffing should be reviewed in the light of the Cathedral's financial position and that any new salaried post must be specifically approved by Chapter. The rationale for such appointments should be carefully communicated to all interested parties.

3 HEALTH AND SAFETY

A Health and Safety Audit was carried out by Quantum Compliance in July 2015. It found shortcomings in terms of policy and management. The audit detailed areas where new or improved safety measures were required and identified physical risks relevant to the activities of the Works Department. It recommended that a fire risk assessment be carried out.

The Visitors found that:
'Commendable progress has been made on all fronts. The management structure has been clearly defined, with Chapter overseeing policy and procedures, and endorsing projects and plans. Health and Safety is now on the agenda of every Chapter and Council meeting until the Cathedral is on a safe footing.'

As a result of various initiatives, they further report that:
'Health and Safety awareness among Cathedral staff has much improved, with a willingness to take responsibility for these issues. Training programmes for new staff and volunteers are in operation, including basic safeguarding training. All physical risks noted in the audit have now been put right and its other recommendations are being implemented, some ahead of schedule. Particular attention is being given to Health & Safety aspects of major services and outside events held in the Cathedral. Information and Communications Technology related matters will be dealt with by a new ICT technician, to be in post shortly. A fire strategy plan has been drawn up with a programme for implementation, including training. Fire safety is now included on the agenda of Health and Safety Committee meetings.'

As a result of these initiatives, the Visitors are satisfied that good Health and Safety practice is becoming part of the Cathedral's culture.

I therefore *direct* that the programme of Health and Safety improvements should be completed and consolidated to achieve best practice standard. Thereafter, care should be taken to ensure that Health and Safety awareness remains high in all departments and best practice is genuinely established.

4 SAFEGUARDING

Too often in the past safeguarding has been regarded as a tiresome administrative burden instead of being integral to the mission and ministry of God's Church. Part of our welcome to people and families is that they know they are safe. In the area of safeguarding the Cathedral should be a beacon of good practice, not simply in the Diocese but across the County. Until recently safeguarding arrangements at the Cathedral have been carried out largely separately from the Diocesan Safeguarding Team. Since 1st April 2016, at the request of Chapter, the Diocesan Safeguarding Team has taken over responsibility for the Cathedral and there is now regular Cathedral representation on the Diocesan Safeguarding Management Group.

In 2015 there was an independent audit of the Cathedral's safeguarding processes at the request of the Dean and the Managing Director. This was delivered in three stages. The Audit Team reported that: 'The safeguarding policy of the Cathedral School is robust and is being implemented,' but disclosed historic defects in safeguarding arrangements in the Cathedral as follows: safeguarding policies omitted the management of those who posed a risk to children and were inadequate; there was a general lack of awareness of the importance of safeguarding and a failure to apply good consistent practice; there was a lack of awareness that the risks to children in the Cathedral community must take precedence over pastoral care of offenders.

The Audit Team pointed out the lack of accountability, clarity or lines of responsibility. No coherent basic training was offered to those employed in the Cathedral or its many volunteers who would be in contact with children. In particular there was a lack of communication and uncertainty as to who was the responsible person to whom they should speak if they had concerns about children who might be at risk or to report allegations of misconduct. There was even a lack of clarity as to who held the main safeguarding responsibility. The recruitment process of employees and volunteers largely ignored safeguarding requirements and CRB (now DBS) checks were not generally carried out or renewed. The Audit Team also found a lack of adequate record keeping, aside from that maintained by a Lay Canon.

In response to the findings of the audit, the Visitors report that Chapter adopted the protocols set out in the Safer Recruitment policy of the Diocese in September 2015. It is anticipated that the revised national guidance will be formally adopted by Chapter this autumn. All staff are required to comply with it. The Visitors report that the Canon who took over responsibility for safeguarding in October 2015 'acted with commendable speed and decision. He has sought advice from professionals at every level and has produced an excellent safeguarding policy.'

Chapter has appointed a Safeguarding Monitoring Group consisting of five safeguarding representatives whose names, contact details and photographs are displayed throughout the Cathedral precincts and on its website. These people have received basic training and are the first port of call for any queries or concerns from any member of the Cathedral community. As a result, the original Safeguarding Working Party which was set up to oversee the implementation of the action plan issuing from the audit has completed its task. The Visitors comment: 'There is now a rolling safeguarding training programme of all those in the Cathedral who may have contact with children and / or adults at risk of harm.'

What is regrettable is that in the midst of the safeguarding audit the Dean announced the appointment of the new Director of Music (from New Zealand), an appointment for which he had taken personal responsibility, without obtaining a DBS clearance from New Zealand. Thankfully the DBS clearance has now come through and everything is in order. The Dean has apologised for his failure to follow the official guidance of the House of Bishops or to observe the protocols of 'Safer Recruitment', but the fact remains that his action gave the mistaken impression that the Cathedral sits lightly to safeguarding procedures. These are legal requirements and not optional extras.

The importance for a Dean of a cathedral, as for the leader of any other institution, to establish and monitor a safe environment cannot be underestimated. In this context it greatly concerned the Visitors that, following his arrival in March 2012, the Dean 'did not initiate any investigation of safeguarding nor it appears ask any questions about safeguarding and recruitment arrangements until the safeguarding audit was commissioned three years later.'

In fairness to those overseeing the life of the Cathedral, the Visitors state that 'the failure to put the safeguarding of children sufficiently at the forefront of Cathedral policy was not unique to Exeter.' Positively, they note with approval that the Safeguarding Monitoring Group meets monthly and that 'safeguarding is now on the agenda at every Chapter meeting and in recent months two excellent safeguarding reports have been made to Chapter.' The formal arrangements between the Cathedral and the Diocese are now in place, and there is an appropriate recruitment policy and DBS checks are being made and recorded.

Whilst recognising the very large number of volunteers at the Cathedral in addition to its employees, I *direct* that, where possible, the safeguarding training programme should be accelerated.

I *direct* that Chapter identify with urgency a replacement for the Canon who currently oversees safeguarding who retires this autumn, and give him or her appropriate training. In future a

Canon or member of senior management must have an appropriate level of safeguarding training *before* taking over the safeguarding responsibility.

I further *direct* that, given the complexity of the Cathedral's operations, a higher level training in safeguarding should be provided for all the Residentiary Canons and not simply for the Dean, and that this shall be renewed regularly. Whilst this may be an additional cost to the Cathedral it is essential.

Subject to these directions being implemented, the Visitors advise that: 'There is now a reasonably satisfactory Cathedral safeguarding policy in place which is in the process of being implemented across the Cathedral community.'

5 MANAGEMENT, GOVERNANCE AND LEADERSHIP

‘Now as an elder myself and a witness of the sufferings of Christ, as well as one who shares in the glory to be revealed, I exhort the elders among you to tend the flock of God that is in your charge, exercising the oversight not under compulsion but willingly, as God would have you do it – not for sordid gain but eagerly. Do not lord it over those in your charge, but be examples to the flock.’

1 Peter 5.1-3

One of the great works on Christian leadership, drawing inspiration from these words of Peter, was written in the sixth century by Pope Gregory the Great. Entitled *Pastoral Care*, Gregory writes: ‘Good leaders who are not trapped by self-love, welcome free and sincere criticism as an opportunity to grow in humility. It is important, therefore, that the gift of leadership should be exercised with the great art of moderation, in order that those in their care should have freedom of speech and not feel intimidated from expressing an opinion.’

All leadership is by consent because in the end it is about taking people with you which is why Gregory insists that it be exercised ‘with the great art of moderation’. Leadership is an art, not a science. It is as much about style and sensitivity, as strategies and game-plans.

MANAGEMENT

During the Visitation the Visitors came to the conclusion that under the heading of ‘Governance and Leadership’, they also needed to look at how people were managed and supported in what is a complex organisation. The Visitors noted that the different functions of the Cathedral generate a diversity of expectations which can be broadly constellated under the umbrella terms ‘spiritual’ and ‘heritage’. In their view: ‘There is no reason why these should not complement one another, but inevitably from time to time they come into conflict. Managing competing interests is not easy. The “normal rules” of management as followed, for example, in a company have to be adapted to the unique circumstances of a cathedral.’

5.1 Management Structure

The Managing Director was appointed on 1 June 2015, having been Deputy Managing Director since December 2014. The Visitors report that: ‘He has developed a streamlined management structure with most of the paid lay staff reporting either directly or indirectly to him. He meets with his direct reports

weekly at a Senior Management Team meeting.' Until recently, however, the Programme Manager for CloistersPlus did not report to the Managing Director and was not a member of the Senior Management Team.

Key members of staff told the Visitors that 'they were not as aware as they felt they should be about CloistersPlus'. In the opinion of the Visitors, this may be due to the separation of CloistersPlus from the rest of the Cathedral's operations. In their view: 'Whilst it is understandable why it was thought to be appropriate to give a separate brand name to the development projects when CloistersPlus first started, and especially when the plan to uncover the Roman baths adjacent to the Cathedral was "live", there is no justification for the administrative separation to continue.' The Visitors therefore recommend that a part-time programme manager should continue to manage the CloistersPlus work, but that he or she should report (perhaps via the Development Manager) to the Managing Director.

5.2 Human Resources

The management of Exeter Cathedral has had to struggle with a number of difficult and costly personnel issues. Until her resignation in March 2015, Chapter benefited from the presence of a Chapter Canon with professional HR expertise. Once the Service Level Agreement with the Diocese came into effect on 1st April 2016, the Personnel Committee of which she had been chair was officially stood down by Chapter. The Cathedral now looks forward to a period of stability with regular access to qualified HR advice. The Visitors observe that a number of the management issues which came to the fore during the Visitation would have been eased considerably if this had been in place earlier.

5.3 Managing Director

The Managing Director is a key role in the Cathedral: it is the most senior lay post. Leadership and coordination are important functions and an outstanding person is required to fill it. The role is less a test of technical skills than a test of 'softer' skills of management, diplomacy, political nous and stamina. A Senior Management Team had been set up by his predecessor, but it met only intermittently. The Visitors commend the current Managing Director for ensuring that the team meets regularly, and for quickly seeing the need to commission external reports on Safeguarding and Health and Safety, but they also highlight a number of areas for his professional development.

I therefore *direct* that the Managing Director receives further professional development support from someone of experience and maturity who is independent of the Cathedral. A suitable person has been identified to carry out this task on a *pro bono* basis.

5.4 Internal Communication

The Visitors received a number of complaints about a lack of communication both from the top down and also laterally between different groups of staff and volunteers who need to be aware of each other's working practices. Lack of consultation by Senior Management of Cathedral staff or of others who are likely to be affected by any proposed changes is a recurrent cause of frustration. Insufficient time and attention is given to the communication of decisions whether taken by individuals or by groups. As a general rule no decision should be taken by the Cathedral's various management groups or its senior staff without first determining who will tell whom and how and when.

A similar frustration emerged in relation to the inadequacy of job descriptions and responsibilities (for example, floor managers) and the relationship between groups of staff or volunteers. The Visitors observed that in some situations it is not always clear who has ultimate authority in case of an incident. Commenting on this situation, the Visitors say:

'All organizations stand or fall on efficient and accurate communication. In its absence people will misinterpret the intentions of the management and will turn against them. This in turn leads to a lack of unity in an organization, loss of morale, and ultimately to the departure of staff and volunteers. The turnover of staff at the Cathedral is high and consistently poor communication could well be a contributory factor. Most importantly, among many lay staff and volunteers there is a strong current of dissatisfaction and unhappiness. There is a widespread feeling of not being valued and morale among many is said to be low. … The Dean, Chapter and Council must recognise the extent of dissatisfaction, low morale and feelings of not being valued. They should take action to improve the situation.'

I therefore *direct* that either the Dean personally or a senior member of Chapter be given responsibility for improving internal communications.

GOVERNANCE

5.5 Residentiary Canons

Each of the Residentiary Canons is responsible for particular areas of Cathedral activities though none directly manages lay staff with the exception of the Precentor who works closely with the liturgy and music team. Although coming from widely differing backgrounds, they should constitute a team under the direction of the Dean, bringing to the life of the Cathedral a variety of gifts and experience that complement one another, but they are disunited.

Following the appointment of the previous Canon Precentor in 2014 to a new position overseas, the Dean petitioned to change the funding arrangements for Canons and to recruit an additional full-time stipendiary Canon. In 2014 a priest who was part-time Canon Missioner (10%) was invited by the Dean to become full-time and accorded the dignity of Canon Chancellor and Missioner, to be funded entirely by the Church Commissioners. In 2015 I appointed an additional self-supporting priest over the normal age for a limited period. The Constitution and Statutes of the Cathedral were accordingly changed to allow him to become a supernumerary Canon. In 2015 a new Canon Precentor was also appointed, now funded jointly from Cathedral income and the Cathedral School.

Poor communication and divisions among and between the Dean and Residentiary Canons is affecting the life of the Cathedral. Members of the congregation observe and comment on the personal tension between the clergy. On occasion, as has already been noted, this leaches into worship with the result that (in the words of the Visitors) 'there is an uneven approach to regular worship, depending on who is conducting the service'. It is not clear to the Visitors that the Dean fully appreciates the gravity of the situation or the way in which tensions among them are picked up by members of staff and members of the Sunday morning congregation in particular. In the view of the Visitors: 'He seems to lack people management skills. This is most obvious and most worrying in the disunity of the Residentiary Canons.'

I therefore *direct* that the Dean and Residentiary Canons seek the help of an experienced facilitator to establish better working relationships between them. The facilitator should be hired on an 'expenses only' basis.

5.6 Chapter

Chapter is the governing body of the Cathedral. It is chaired by the Dean and meets monthly. In the opinion of the Visitors it is not functioning satisfactorily and needs to be more collegial. It has not been assiduous in exercising its corporate responsibility for the life of the Cathedral and its members have not always been obedient to the decisions it has made. Currently its attendees are the Dean, the four Residentiary Canons, the three Chapter Canons, the Chair of the Cathedral Council who is a Lay Canon, the Managing Director, the Communications Adviser and a Minutes Secretary. Various Heads of Departments join the meeting for items in which they have an interest. Meetings, however, last on average seven hours with a break for lunch. The Visitors report that this is much longer than most other cathedral chapters and that, as a result, participants become tired, even restless. Staff due to present papers can also be kept waiting which is both discourteous and demoralizing. The Visitors have made a number of detailed recommendations to improve the functioning of Chapter meetings which I have conveyed in a separate letter to the Chapter with the imperative to discuss and implement.

The Visitors are pleased that the Managing Director is to become a voting member of Chapter. This is consistent with the way most other organisations function. However, they recommend that the Chair of the Cathedral Council should *not* attend Chapter. Whilst appreciating the practical reasons why the Dean invited him to attend Chapter meetings, this is contrary to good governance so long as he is Chair of the Council. A principal function of the Cathedral Council is to *advise* Chapter (see passage on Council below) and this is potentially undermined if its Chair is also attending the very body the Council is supposed to scrutinise.

I therefore *direct* that the Chair of the Cathedral Council should not attend Chapter.

In June 2015 the Association of English Cathedrals published a 'Framework for Self-Evaluation'. In addition to the recommendations of the Visitors to improve the functioning of Chapter meetings, I encourage Chapter to work through the topics and questions set out in this document. It is an inexpensive exercise similar to those undertaken by public bodies to evaluate their performance and demonstrate accountability. Carrying out such a self-evaluation, not least in the light of this Visitation, is the prime responsibility of Chapter, but it should also involve others on the Cathedral staff, particularly the Senior Management Team, members of the Cathedral community, and other stakeholders as appropriate. It will provide an opportunity to conduct a structured and comprehensive review of what they are doing, to devise ways of building on strengths and addressing weaknesses, and to monitor progress.

I therefore *direct* that during the next year the Chapter shall undertake a self-evaluation exercise as published by the Association of English Cathedrals and present their findings to the Cathedral Council.

5.7 Committees

The Visitors recommend that the Cathedral should function with the 'minimum number of committees'. They comment: 'At a time when staff need to focus on getting the Cathedral through its difficulties, especially its financial difficulties, preparing for and attending committee meetings is not the most efficient use of their time.'

I therefore *direct* that the recommendations of the Visitors for the better ordering and use of the Cathedral's committees summarised here below be implemented and that progress be monitored by the Cathedral Council.

a Commercial Operating Committee

The Visitors question the need for the Commercial Operating Committee in its current form. The attendees are the Chair of the Finance Committee and as many as eleven members of staff. The

Visitors recommend that it be abolished and instead suggest that the Managing Director receives regular reports of each function as part of his one-to-one meetings and/or at meetings of the SMT. Any material issues should be raised with the Finance Committee. The Visitors also suggest that a consultative group is formed of those within the Cathedral community with business experience, in particular retail experience, to give advice to the relevant Heads of Department on an *ad hoc* basis.

b Finance Committee

The Visitors recommend that the Finance Committee meetings should be synchronized with Chapter meetings. Notwithstanding the comments about staff time, it may be necessary for the Finance Committee to meet more frequently during these difficult times. They also think that it would be wise to recruit a qualified accountant to join the Finance Committee to give it additional strength and who may, in due course, assume its chairmanship.

c Audit and Risk Committee

The decision to appoint a separate Audit Committee follows best practice in other organizations. It means that audit matters are separated from Finance. The Visitors are concerned if the addition of 'Risk' to the remit of this committee in any way reduces the need for Chapter to monitor significant risks which is a key task of Chapter or if it increases the workload of the staff in providing support to the committee. The Visitors therefore recommend that Chapter monitors the effect of the addition of risk to the remit of the Audit Committee.

d Cathedral Community Committee

The Constitution and Statutes of the Cathedral state that this committee 'shall advise the Chapter on all matters concerning the life of the Cathedral and its community and shall act as a channel of communication between Chapter and community'. Members of the Committee complained to the Visitors of poor communication and expressed 'anxiety about the direction of travel which the Dean is endeavouring to take the Cathedral in its worship'.

Whilst appreciating the difficulty that the Cathedral has in meeting the contrasting needs of the occasional visitor and the regular attendee, the Visitors think that 'it is possible to achieve a balance without disturbing the regular congregation on whose loyalty and goodwill the Cathedral is so dependant'. It is the good custom of the Church of England and enshrined in its Canon Law that the incumbent of a parish will consult his or her PCC in the ordering of its worship and, if a change in vesture or form of service is proposed, will seek their views and support. Although the Cathedral is not a parish church, respect for the views of the representatives of the congregation should characterise its life and foster a sense of partnership in the Gospel. One of the reasons I direct that

Chapter shall undertake an audit of its worship (see above 1.1) is to address this underlying anxiety and to forge a greater consensus about the pattern and style of the Cathedral's worship.

In this context, the Visitors recommend that the Dean and Chapter make better use of the Cathedral's Community Committee as a forum for consultation, not least in matters to do with proposals for changes to services, and 'pay due regard to its views'. In turn, if the committee is to be an effective body, it is important that it is genuinely representative of the Cathedral Community and its congregations. To this end, its membership may need to be refreshed bearing in mind the Committee's statutory responsibilities.

5.8 Cathedral Council

The Cathedral Council is an advisory body. The Constitution and Statutes provide for a Council of twenty members. The Chairman is appointed by the Bishop; the Dean is a member *ex officio*; the others are three Chapter members (currently three of the four Residentiaries) chosen by Chapter; two elected members of the College of Canons; three members elected by the Cathedral Community; and ten other members appointed by the Bishop to reflect a wide variety of experience and interests. Currently they include the Chairs of the Cathedral Friends, the Cathedral Preservation Trust and the Cathedral Music Foundation Trust.

The Council's duty is to 'further and support all aspects of the work of the Cathedral,' reviewing and advising on the direction and oversight of that work by Chapter. It meets every quarter to review financial matters, including the formal accounts, proposed annual budget and financial progress in-year, and to receive reports on projects and other matters of importance.

The Visitors report that the Cathedral Council seems to work well and that there is a good level of participation, but advise that its membership could be refreshed.

LEADERSHIP

There is a corporate and a personal dimension to the leadership of a cathedral. As the governing body of the Cathedral, Chapter has corporate responsibility for its management, worship, ministry and mission. The Dean, as head of the Cathedral Foundation and its senior priest, chairs Chapter and is its human face. He is to set out the vision and direction of travel of the Cathedral, and is responsible to the Bishop for its maintenance and life. He is to be a person of prayer, personally leading the liturgy and worship of the Cathedral, managing its life and pastoral care, and overseeing its governance.

5.9 The Dean

The current Dean was appointed in March 2012 and the Visitors assessed his leadership against the challenges, duties and responsibilities set out and agreed by the National Church for this appointment, examples of which are set out below.

The Dean is to exercise leadership in the Cathedral's liturgy, preaching and pastoral care, to develop team working (with both lay and ordained colleagues) in its ministry, and to be personally committed to its pattern of daily prayer.

Duties and Responsibilities of the Dean: Para 6

Within the Chapter the Dean is to have oversight of the Cathedral's development and to lead in securing funds for a secure, stable and financially independent future. He is to ensure that the Cathedral's operations are properly managed, including staff, finance, compliance and the care of the fabric.

Duties and Responsibilities of the Dean: Para 9

The Dean is to bring vision into reality; to ensure the organisational capacity and the necessary funds are in place to support the proposed Development Plan and to oversee a significant period of building projects.

Challenges of the Role of the Dean of Exeter: Para 2

The Dean is to build on existing strong links into the city of Exeter so that the Cathedral can play its role as an effective partner in the ongoing community agenda.

Challenges of the Role of the Dean of Exeter: Para 5

The Dean is to represent the Church in public life across the Diocese, to grow partnerships with faith and secular institutions, and to contribute to their intellectual, social and theological capital.

Duties and Responsibilities of the Dean: Para 3

The Dean is to attend and participate in the Cathedral Council and other statutory bodies and in collaboration with the Chapter to ensure sound governance across the Cathedral.

Duties and Responsibilities of the Dean: Para 5

To many within the city and county the Dean presents a dynamic image of the Church. Under his leadership the Cathedral is open and welcoming. As a result, there is a real willingness on the part of the Cathedral to reach out rather than waiting to be asked. He has built successfully on existing relationships in the city and county, and shown visible support for minority communities. These achievements are to be affirmed and celebrated. Other aspects of the Dean's leadership, however, as is reflected in this Charge, the Visitors deem to be open to criticism. Although an excellent preacher, the Visitors were repeatedly informed that the lack of spiritual leadership and pastoral care emanates from the Dean himself. They report that in respect of his duty to ensure sound governance across the Cathedral, 'he has made decisions without discussion or consultation with others, including the Residentiary Canons or Chapter, or on management matters with the Managing Director. He claims to be a "big picture" thinker, but appears not to listen to advice, even from senior colleagues.'

Morale is a notoriously difficult thing to assess, but in relation to the widespread feelings of discontent reported by the Visitors, they comment: '[The Dean] appears to have little interest in the more mundane running of the Cathedral. He does little to encourage staff and seems to have little

contact with many regular members of the congregation who claim to find him remote and disinterested. He himself admitted to us that he had not always handled personnel issues well; and that he was impatient for change – and could have handled some situations more gently.' People matter and this prevailing feeling of not being valued needs to be addressed both personally by the Dean and collectively by Chapter.

5.10 Change and renewal

Looking to the future, the Visitors comment: 'A change of culture among the Cathedral leadership is essential in order for the changes we recommend to be implemented. Better communication across the Cathedral is crucial if morale is to be restored and to ensure efficient coordination between various departments and groups of volunteers. This should help to alleviate the widespread sense of being undervalued which we have discerned throughout the Cathedral community.' In conclusion they say: 'We do not believe that the Cathedral can continue to function adequately on the present basis given the financial and other challenges it faces until and unless the failures in leadership and poor management identified during the course of the Visitation are addressed satisfactorily'.

The key body to deliver the necessary improvements and efficient management is the Chapter as led by the Dean. The Dean's leadership is crucial. The Dean must do more to take people with him and build consensus. A Dean can delegate many things, but the one thing that a Dean cannot delegate is the culture of the cathedral over which he or she has oversight.

I therefore *direct* that:

a. the Dean will be responsible for overseeing the implementation of this Charge and its directions. Any departure from its directions or the timetable stated in a given direction will require my express sanction.

b. the Chapter as led by the Dean will work to effect a 'change of culture' in the Cathedral, supported and advised by a management consultant whom I will appoint and whose expenses will be met by the Cathedral. This will place an additional strain on the finances of the Cathedral but I believe it to be vital in going forward. The management consultant will work with the Dean to set clear objectives for the improvement of the Dean's leadership and management of Chapter and the wider Cathedral community, such objectives will be SMART (Specific, Measurable, Achievable, Realistic and Timed).

c. the Dean, in terms approved by Chapter, will make a written report to the meetings of the Cathedral Council on the implementation of my Charge until further notice.

d. the Chair of the Cathedral Council will furnish me with a progress report not later than 1st April and 1st October of each year until matters have improved to my satisfaction.

5.11 What does a 'change of culture' look like?

There are no magic wands to effect a change in culture. The first requirement is to recognize that change is necessary. There also needs to be an abundance of goodwill and a spirit of forgiveness, particularly when people have been hurt and trust is fragile. A 'change in culture' is more akin to a journey, than a destination, but there are markers which designate the required route:

- The primacy of worship needs to be recovered, with a renewed sense of prayer and devotion.
- People matter. Staff, volunteers and colleagues need to be thanked and affirmed if a culture of generosity and joy is to be nourished at the heart of the Cathedral.
- Consultation needs to be a genuine exercise in listening and discernment, carried out in an atmosphere of mutual respect. Consultation is not the dissemination of decisions that have already been made.
- Communication. Communication. Communication.
- There needs to be a renewed willingness and commitment to work together for the good of the Cathedral and its flourishing.

5.12 Christian Leadership

In his monastic *Rule*, St Benedict gives the abbot the following advice on the ordering of his monastery. His advice is equally applicable to a bishop, a dean or a parish priest. I offer it to the Dean and Chapter, and the Cathedral community, as together they reflect on this Charge for there are few better summaries of Christian leadership:

'The abbot should always remember what he is and what he is called, and should remember that more will be expected from those to whom more is entrusted. He must know how difficult and arduous is the task he has undertaken of directing souls and adapting himself to a variety of temperaments. He must learn to humour, reprove and encourage as appropriate. He must learn to accommodate his leadership according to the character and intelligence of the individual members of his community. In this way not only will he ensure that the flock under his care does not dwindle, but that it actually grows. Above all, let him never have too great a concern for what is fleeting, the temporal things of this world, with the result that he overlooks or undervalues the salvation of the souls committed to his care. He should never forget that he has undertaken the care of souls and he must render an account to God.'

Therefore in his leadership of the community, whether the task he assigns concern God or the world, let everything be done with discernment and moderation, bearing in mind the discretion of holy

Jacob, who said, 'If I drive my flocks too hard, they will all die in a single day.' (Genesis 33.13) Therefore, drawing on this and other examples of discretion, which is the mother of all virtues, let the life of the community be so regulated that the strong always have something to strive after, and the timid do not draw back in alarm.'

May the grace of our Lord Jesus Christ, the love of God, and the fellowship of the Holy Spirit guard us and guide us. Amen.

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