

Draft Guidance on The House of Bishops Policy on Permission to Officiate (PTO)

Guidance summary

This guidance is designed to support the House of Bishops Policy on PTO bishops in

- managing the processes for granting, reviewing, renewing, refusing, not renewing and withdrawing PTO (including safeguarding checks in line with Safer Recruitment Guidance)
- providing effective arrangements for the oversight of clergy on PTO
- enabling clergy with PTO to use their talents as effectively as possible and to contribute fully to the mission and ministry of the Church.

It provides guidance on

When it is appropriate to grant PTO as distinct from giving a licence (section 1 and Appendix 1).

How to exercise oversight by designating someone as responsible for the ministry of a cleric with PTO (section 4).

Generic role descriptions and statements of agreed expectations (section 5)

Safeguarding training (9).

FAQs (10)

Many clergy on PTO are retired. See the guidance on PTO and retirement in Appendix 2.

Links to other relevant documents are provided in section 11.

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Purpose

This Guidance is provided to support Bishops in applying the House of Bishops Policy on Permission to Officiate and ensure that bishops have appropriate arrangements in place for the oversight of clergy with PTO.

Defined Terms

Defined terms

Authorised – means having authority to officiate either by holding beneficed office or having a licence or being given PTO.

Barred List - means the list maintained by the DBS barring individuals from working with children and/or vulnerable adults.

Bishop – means diocesan bishop or, if the diocesan bishop has formally delegated this function, an area or suffragan bishop serving in the diocese

Church officer - means is anyone appointed/elected by or on behalf of the Church to a post or role, whether they are ordained or lay, paid or unpaid.

Clergy File means the Clergy Personal previously known as the Blue File.

Cleric – means a deacon or priest with PTO.

CCSL – means the Clergy Current Status Letter including the Episcopal Reference.

CDM – means the Clergy Discipline Measure 2003 (as amended).

CMD – means Continuing Ministerial Development.

Designated Responsible Person – means someone designated by the Bishop to have specific oversight of the ministry of someone with PTO.

DBF- means Diocesan Board of Finance.

DBS - means the Disclosure and Barring Service.

DDO means the Diocesan Director of Ordinands.

DSO – means Diocesan Safeguarding Advisor/ Officer.

Guidance – means the Guidance that applies to this Policy.

The Extra-Parochial Ministry Measure - means the Extra-Parochial Ministry Measure 1967, which enables a chaplain who is employed by an institution such as an NHS Trust, or a teaching establishment, to minister without the need to obtain the consent of the incumbent of the parish where the institution is situated.

MDR – means Ministerial Development Review.

Officiate - means preaching, taking a service of morning or evening prayer or other service of the Word, presiding at the Eucharist, taking occasional offices (weddings and funerals), or vesting or wearing robes in a church or chapel during a service.

OPTO – means Overseas Permission to Officiate (in accordance with the Overseas and Other Clergy Measure 1967). See Appendix 3.

The Overseas and Other Clergy Measure - means the Overseas and Other Clergy (Ministry and Ordination) Measure 1967.

PCC - means Parochial Church Council.

People System – means the electronic repository containing the personal records of clergy maintained by the bishop used to update the Register.

PEV - means Provincial Episcopal Visitor, a Bishop available to provide episcopal ministry under the House of Bishops Declaration on the Ministry of Bishops and Priests and in accordance with the Five Guiding Principles.

PTO – means Permission to Officiate.

Register – means the national clergy register which is an online record of all clergy with authority to minister. This is updated in line with Bishops' records on the people system.

Retired Clergy Officers (RCOs) – means individuals who are appointed by the Bishop and are largely concerned with pastoral care of individuals and communication between retired clergy and the bishop and diocese. Some have other responsibilities in promoting learning or improving administration around safeguarding or renewal of permission to officiate and a more strategic role in assisting deployment or working with diocesan initiatives.

Safer Recruitment Guidance - means the House of Bishops' (HoB) Safer Recruitment & People Management Guidance.

Sequestrators - means the Churchwardens and area/rural dean when the office of incumbent is vacant.

Short term OPTO (see Appendix 3) is the process that enables an overseas cleric on a short visit to robe, preach, and preside at services when other clergy are present.

Vacancy - means when there is nobody, whether as incumbent or priest in charge, holding office in the benefice.

Vesting - means the wearing of specific robes and items of clothing which not only symbolise order, office, and role or function, but are specific to certain times and celebrations during the Church year.

Guidance

Guidance statement

1. This Guidance is recommended as good practice (where the word 'should' is used) and suggests how the policy could be implemented in a diocese (when the word 'may' is used).
2. Links to relevant other material are provided in section 11.

1. Basic Principles of PTO

1.1 The diocesan bishop confers authority on an ordained minister either by:

- instituting the minister to a benefice;
- admitting the minister to serve within the diocese by licence and seal; or
- giving the minister written PTO within the diocese.

1.2 Many clergy on PTO have retired from office. See Appendix 2 for guidance on PTO and retirement.

1.3 PTO is designed to be flexible and comes without the legal duties that go with holding office. Some clergy with PTO will have an extensive ministry with a leadership role, but others (particularly later in retirement) may only exercise their permission to officiate occasionally. These are both valid and valuable contributions to the ministry of the Church.

1.4 The ministry of a cleric on PTO will reflect changes in the circumstances of the cleric (such as improvements or deteriorations in a cleric's health, and retirement from other paid work that can release additional time and energy that the cleric wishes to contribute). It may also change in response to changes in the benefice, such as a vacancy or the arrival of a new incumbent or priest in charge. PTO can accommodate all of these, although it should be regularly reviewed, and these changes reflected in agreed statements of expectations.

Expenses

1.5 Arrangements must be made to provide full reimbursement of all expenses of formal ministry by clergy on PTO. Travel expenses should be the actual cost or mileage at the current rates of approved mileage allowance payments set by HM Revenue and Customs. Further details can be found in the Booklet: The Parochial Expenses of the Clergy: A Guide to their Reimbursement.

1.6 Clergy on PTO should not normally receive expenses for taking a service in their usual place of worship, unless they are covering a vacancy or a period of long-term sickness. Even in a large rural multi-parish benefice, they should not normally receive travel expenses for taking services at the church where they usually worship, although expenses should be paid for services taken at other churches within the benefice.

Fees

1.7 It is the responsibility of the diocese to determine its policy about offering a proportion of the fee for occasional offices to clergy on PTO and making payments to clergy on PTO who provide cover in a benefice where they do not usually worship

When is it appropriate to grant PTO?

1.8 Which form of authorisation is appropriate for someone's ministry and whether or not to grant PTO is a matter for the bishop to determine.

1.9 Clergy are generally required to retire from office at 70 years of age, and clergy who wish to continue to exercise a ministry after reaching 70 would normally apply for and be given PTO. See Appendix 2.

1.10 PTO is not necessarily the only option for all clergy who have retired, particularly where they have an extensive ministry with a leadership role. In these circumstances, the bishop may make a direction under Reg 29A of the Ecclesiastical Offices (Terms of Service) Regulations 2009 that a cleric aged 70 or over will hold office, although these cases are likely to be exceptional. It is important to be aware of the legal implications before deciding whether to issue a licence. See Appendix 1 which provides guidance on the legal differences between ministry with PTO and ministry under licence.

1.11 Clergy with a licence have all the entitlements and obligations conferred by the (Ecclesiastical Offices) Terms of Service Measure and Regulations. By contrast, PTO is granted and held at the will of the diocesan bishop for a fixed period and may be withdrawn at any time. Those who have it may only exercise their ministry at the invitation of the relevant incumbent or priest in charge. A cleric on PTO has no pastoral or liturgical duties that he or she is *required* to undertake. Mutual expectations about the ministry of a cleric with PTO should be agreed with the Designated Responsible Person (and the incumbent/priest in charge if not the Designated Responsible Person) and kept under regular review.

1.12 Not all clergy with PTO are retired. Examples where it would be appropriate to grant PTO to someone who has not retired include:

- someone in good standing who has left parochial ministry in order to take employment outside the Church, but who wishes to continue to offer help, for example with the Occasional Offices;
- a sector minister or chaplain with a licence limited to their place of work who needs PTO in order to carry out occasional ministry elsewhere;
- a cleric who requires a period of staged return to ministry; or

- a cleric who is licensed in one diocese but who may have occasion to minister regularly in another diocese, such as someone who is a representative for a Church Mission agency.

2. The Process of granting PTO

2.1 The overall process for giving PTO is summarised in Appendix 3. Whether or not the cleric is moving to a new diocese, the elements will be largely the same, although the safeguarding checks will be different in the latter case.

Exit interview

2.2 The exit interview with the cleric should be done in good time before they retire and cease to hold office (whether because they are moving to a new appointment in another diocese, or are retiring from stipendiary office or have reached the retirement age of 70), in order to:

- **thank** the cleric for their contribution to the mission and ministry of the diocese;
- **explain** how the process of requesting PTO works and the need to complete an application form in good time if the cleric wishes to be able to officiate without taking a temporary break from ministry at retirement (see Appendix 2 on PTO and Retirement);
- **discuss** future plans including whether the cleric wishes to continue to exercise a ministry and, if the cleric is remaining in the same diocese, what kind of ministry the cleric might have;
- if the cleric is wishing to continue to have a ministry in the same diocese, **explore** whether they are interested in a ministry beyond the deanery where they are going to live, and are willing to travel to parishes in neighbouring deaneries, or are willing to assist in any other capacity (such as being available for occasional one-off tasks or projects, for example, mentoring, carrying out investigations or finding out on behalf of the bishop what is going on in a benefice where concerns have been raised, or providing temporary cover during sickness or a vacancy).

Completing an application form

2.3 The Bishop should provide an application form for clergy to use when they wish to apply for PTO in the diocese. See Appendix 4.

Assessing suitability

2.4 This is covered in the policy.

2.5 It is a criminal offence for an individual who is barred from working with vulnerable groups to apply for a regulated activity role (including PTO).

2.6 It is a criminal offence to appoint a barred person to a regulated activity (including PTO).

3. Restrictions to PTO

- 3.1 PTO may cover an entire diocese, a parish/benefice, a Bishop's Mission Order, a deanery or an archdeaconry or episcopal area.
- 3.2 In exceptional circumstances, particular geographical restrictions may be appropriate (for example, when someone's PTO is confined to a particular parish/benefice or deanery on an experimental basis after a break from ministry). If it is decided that the cleric can minister more widely, it will then be necessary to extend the existing PTO

4. Designating a person to be responsible for the ministry of the cleric with PTO

- 4.1 The diocesan bishop is responsible for ensuring oversight of all clergy with PTO. The diocesan bishop must decide the nature of this oversight.
- 4.2 In discharging their duties to ensure appropriate oversight, the bishop may designate someone to be responsible for the ministry of someone with PTO.
- 4.3 The Designated Responsible Person should
 - meet the cleric with PTO and agree expectations of the work that the cleric will do;
 - review these expectations regularly;
 - discuss the ministry carried out by the cleric with PTO regularly;
 - ensure that a written record of the ministry provided by the cleric with PTO is sent to the bishop, along with any change in the expectations, to be placed on the Clergy File;
 - either recommend, where appropriate, and subject to the relevant safeguarding checks, that the bishop renews the PTO when the current term is due to expire, or explain to the bishop why the designated person does not consider that the PTO should be renewed; and
 - ensure that the bishop is kept informed about any issues or health concerns, particularly where the cleric with PTO might require additional pastoral support, or it might be necessary to consider withdrawing PTO.
- 4.4 As incumbents and priests in charge have to give permission to clergy with PTO to exercise ministry in their parish(es), it is often appropriate for them to be the Designated Responsible Person, particularly if the ministry of the cleric with PTO is confined largely to one benefice or deanery.
- 4.5 If the ministry of a cleric on PTO is not focused on a particular place, and has a ministry that extends over more than one benefice it may be more suitable for some other person to act as the Designated Responsible person such as
 - the area/rural dean;
 - a member of the bishop's staff team;
 - the bishop's chaplain or member of the bishop's staff team; or
 - someone else specifically appointed by the bishop.

4.6 The bishop should keep up to date records of who the Designated Responsible Person is and must ensure that someone (possibly the area/rural dean) is carrying out this role during a vacancy in the benefice where the cleric with PTO ministers, which may be a time that a cleric with PTO is having to provide more assistance in a benefice.

5. Generic diocesan role descriptions and statements of agreed expectations

5.1 The Safer Recruitment Guidance makes it clear that all Church Officers within its scope – which includes clergy with PTO – must have a clear job or role description which sets out what tasks the cleric will do.

5.2 A role description which sets out what tasks the cleric on PTO will do should comprise:

- A largely generic statement that will apply to all clergy with PTO in the diocese, and which will remind clergy of the legal and other requirements that go with PTO, and set out practice in the diocese around matters such as fees and the Occasional Offices (see Appendix 5 Model Permission to Officiate and generic diocesan role description);
- A set of non-binding expectations about the kind of ministry the cleric with PTO will provide, agreed between the cleric with PTO and the designated responsible person, and reviewed regularly. (See Appendix 6 Model statement of agreed expectations.)

Generic diocesan role descriptions

5.3 The generic diocesan role description for all clergy with PTO in the diocese may include:

- information on whether payment for Occasional Offices is offered;
- the processes for claiming these payments and the importance of declaring them to HMRC;
- the requirement to liaise with the relevant incumbent/priest in charge when exercising a ministry;
- the need to work in accordance with the House of Bishops Safeguarding Policy and Practice guidance;
- the need to report any safeguarding concerns or allegations to the DSA/O in line with House of Bishops guidance on responding to safeguarding concerns or allegations that relate to children, young people, and vulnerable adults and Responding to, assessing and managing concerns or allegations against church officers practice guidance (2017);
- access to CMD relevant to the ministry being exercised;
- the requirement to participate in and satisfactorily complete all required safeguarding training;
- arrangements for review/renewal of PTO, which will be linked to the expiry of the DBS check;
- relationships with rural/area dean;
- other matters as a diocese may think useful, such as the Guidelines on the Professional conduct of the clergy;

- any geographical restrictions on permission; and
- the name of the Designated Responsible Person.

5.4 The generic role description can be attached to the application form (see the model at Appendix 6) and the Permission to Officiate (see the model at Appendix 7.)

Statements of agreed expectations

5.5 Clergy with formal responsibilities in a parish will usually be licensed to the benefice. However, where someone with a PTO offers to provide regular cover in a particular parish or benefice (but not to the extent that would justify their being given a licence), it will generally be helpful, for the incumbent or priest in charge and the cleric with PTO, to have agreed what is expected of the cleric with PTO, even if their duties are informal and occasional. See Appendix 7 Model statement of agreed expectations for an example.

5.6 The circumstances of the parish or benefice and the use it can make of someone's ministry may also change when an incumbent or priest in charge leaves the benefice especially if the cleric is willing to provide additional cover and support to the benefice during the vacancy. In these circumstances it may be necessary to designate the area/rural dean as the Designated Responsible Person and ensure that the cleric with PTO is kept informed on progress with filling the vacancy. It should not be assumed that the cleric will necessarily be happy to continue in this role indefinitely, particularly if the vacancy is protracted.

5.7 These expectations can be changed and reviewed at any time if the cleric with PTO or the Designated Responsible Person requests this.

6. Reviewing PTO

6.1 All clergy with PTO, even if their duties are light and irregular, should have a regular (not necessarily annual) review of their ministry with the Designated Responsible Person to clarify and record in writing their mutual expectations about the extent and nature of the assistance that the cleric on PTO will provide.

6.2 Matters for discussion at review might include whether the cleric with PTO:

- has talents and capacity that are currently not being used;
- should be given a licence, rather than PTO, if they are exercising a leader role for example during a vacancy or have become an integral part of the ministry team with regular duties in the benefice;
- might be willing to carry out additional duties, either in the deanery or for the diocese, particularly if these are temporary and the commitment is not permanent;
- may need to reassess the nature of the ministry that they are offering (whether by doing more or by doing less);
- may need adjustments and additional support to enable them to continue to preside at the Eucharist and preach;

- may no longer be physically or cognitively able to preside at the Eucharist or preach, even if adjustments are made, and should consider whether PTO is still appropriate;
- may need their PTO to be reviewed annually rather than every three years;
- should have a different Designated Responsible Person (for example, if there is a vacancy, when it may be necessary for the area/rural dean to take responsibility for this, or if the focus of the ministry provided by the cleric with PTO has changed);
- has any training needs;
- is having to take a more active role in the benefice during a vacancy and needs additional support and to be kept informed about the appointments process; and
- will need to apply for an enhanced DBS with barred list check renewal or refresh safeguarding training shortly in order to continue exercising a ministry.

6.3 This review need not be time consuming or extensive, particularly if there is no change to the agreed expectations.

Annual reviews

6.4 The ministry of someone on PTO can change for a variety of reasons. This means that sometimes it will be more appropriate to review that ministry more regularly than once every three years at renewal. There are a number of potential reasons for this. Examples include the following.

- The nature of the ministry that someone is willing or able to offer is changing as they become older and are no longer able to do as much as they used to be able to do
- There are concerns about ensuring that the cleric does not endanger his or her health, and that appropriate adjustments to support them (for example a trained server to assist them) may need to be made
- The cleric has not engaged in ministry for over a year.
- A cleric recovers after a period of poor health and is at the stage of finding out what ministry they are now able to provide.
- An SSM cleric retires from other employment and is working out what additional ministry they might be able to offer.
- The benefice is undergoing change (such as a vacancy).
- The cleric takes on a new form of ministry (for example helping out in a nearby benefice).

6.6 An annual review does not mean that PTO needs to be given on an annual basis. The Designated Responsible Person can *review* PTO annually, even though it is *issued* for three years. This means that DBS checks and safeguarding training are also only required every three years.

6.7 Bishops should encourage Designated Responsible People to move to annual reviews if there are any grounds for concern about the cleric's health or capacity or someone has not carried out any ministry for over a year. But moving to annual

review should not be seen as a prelude to not renewing PTO. Nor should annual reviews be required simply because someone has reached a particular age. Some clergy over, for example, 80 may not need an annual review, whilst it may be appropriate for some younger clergy.

- 6.8 Whether reviews are annual or three yearly, either the designated person or the cleric with PTO may request a review at any time if the statement of agreed expectations needs to be reviewed.
- 6.9 The Bishop can require a review at any time.

Ministerial return form

- 6.10 The extent of the ministry provided by clergy with PTO is easily underestimated. These forms can helpfully inform discussions between a cleric with PTO and the designated responsible person and enable a diocese to be aware of the extent of the ministry provided by clergy on PTO. (see Appendix 4)
- 6.11 It is for the Bishop to determine how if or how regularly these forms should be completed. Asking for an annual form may be considered unduly onerous. Alternative approaches might be providing a return following a review or attaching it when applying for PTO to be renewed. It will also be helpful to analyse the results on a diocesan basis so that the contribution made by clergy on PTO can be acknowledged and understood.

Change of incumbent or priest in charge

- 6.12 Those with PTO may only minister at the invitation of the incumbent or priest in charge. When there is a change of incumbent or priest in charge in a benefice, he or she will need to meet the cleric with PTO to review and clarify mutual expectations and if appropriate revise the statement of agreed expectations and discuss the nature of the ministry to be carried out by the cleric with PTO. This procedure will need to be carried out with sensitivity. Often the cleric with PTO will have worked hard in the benefice during the vacancy, and the new incumbent/priest in charge and area/rural dean should acknowledge this.
- 6.13 Following a change of incumbent/priest in charge, the agreed expectations should be reviewed, and they may need to be subject to more regular review on a temporary basis. It may be necessary to consider whether it is still appropriate for the incumbent/priest in charge to be the appropriate designated person, for example if the cleric with PTO is developing a ministry elsewhere, for example in another benefice. In these cases, it may be necessary for the designated person or the cleric with PTO to request a change from the Bishop. Alternatively, the Bishop can decide to make a change if he or she considers this appropriate.

7. Renewing PTO

- 7.1 It is a requirement of the Safer Recruitment Guidance that those roles requiring an enhanced DBS have a renewal of their DBS check carried out every 3 years and that the period of the PTO should not exceed the period for which there is a valid DBS check.
- 7.2 Clergy need to reapply for PTO before their term runs out. See the application form for renewal of PTO at Appendix 6: Model Application Form for Renewal of PTO including summary of ministry undertaken. The PTO will expire unless a formal

letter of extension is obtained following a successful application to renew. Alternatively, a renewal of PTO can be applied for by the Designated Responsible Person providing feedback. See also Appendix 6.

- 7.3 A further confidential declaration is not required if an existing PTO is being renewed.
- 7.4 If the cleric holds office or has PTO in another diocese and that is where the Clergy File is kept, a CCSL and confidential declaration are not required in order to renew an existing PTO. But if the PTO has expired, then any subsequent application for PTO needs to be treated as a new application and a CCSL and confidential declaration will be required.
- 7.5 The Designated Responsible Person should countersign the application form for renewal of PTO.
- 7.6 The Bishop should consult the area/rural dean (if the area/rural dean is not the Designated Responsible Person) before renewing PTO.
- 7.7 If the agreed expectations have not been recently reviewed, they should be reviewed before PTO is renewed.
- 7.8 There will be times when the Designated Responsible Person will need to review the PTO annually.
- 7.8 Following a review, it will not always be appropriate to renew PTO, if, for example, the cleric is no longer physically or cognitively capable of presiding at the Eucharist or of preaching, even if adjustments are made. Some clergy may be able to do one but not the other, and it may still be appropriate for them to have PTO. The Designated Responsible Person will need to raise this sensitively with the cleric with PTO and make the appropriate recommendation to the Bishop.

8. Refusing, withdrawing, or not renewing PTO

- 8.1 It is a criminal offence to appoint a barred person to a regulated activity (including PTO).
- 8.2 Ultimately refusal, withdrawal or non-renewal of PTO is a decision for the Bishop, although the Bishop may find it helpful to have obtained the views of the Designated Responsible Person and possibly the RCO, and to act on their advice before doing so.
- 8.3 PTO must be withdrawn in circumstances where a licensed or beneficed cleric would be suspended under the CDM. The Bishop will need to make arrangements for pastoral care of the cleric and inform the Designated Responsible Person and the RCO.
- 8.4 The cleric will have the right to make a subject access request and see the Clergy File including the reason for the refusal, withdrawal or non-renewal.

Refusing PTO

- 8.5 It is usual (subject to safeguarding checks) to give PTO to a cleric in retirement if he or she asks for it, unless there is a good reason for not doing so.
- 8.6 Canon C8.2 provides for the clergy who have the Bishop's authority to minister in one diocese to minister outside that diocese on the invitation of a minister having

the cure of souls for a period of not more than 7 days within 3 months without reference to the Bishop provided that the minister with the cure of souls has checked that the cleric has the necessary authority from their own bishop. If the cleric does not live in (or just outside) the diocese, or is not a regular visitor, the bishop should be satisfied that PTO is actually required. Where a cleric already has PTO in several dioceses, it may be appropriate to ask whether it is really needed.

Withdrawing PTO

8.7 PTO must be withdrawn if a cleric would be suspended under the CDM whether or not the matter relates to safeguarding, for example:

- if arrested for a criminal offence not related to safeguarding, or
- as a result of substantiated safeguarding concerns, or
- following an initial assessment of safeguarding concerns or allegations (in line with the House of Bishops policy and Safeguarding Code of Practice) or
- because of failure to comply with House of Bishops' Policy Guidance and Safeguarding Code of Practice on safeguarding children and vulnerable adults, including failure to participate in safeguarding training.

8.8 Other appropriate reasons for withdrawing PTO include:

- the cleric is now no longer physically or cognitively able to preside at the Eucharist or to preach, or engage in any of the other ministries exercised by clergy with PTO, even if adjustments are made, (although it may be appropriate to issue PTO in cases where the cleric is still able to exercise a ministry even if no longer able to preside or preach);
- following a change of incumbent or priest in charge, who is not willing for the cleric to continue to exercise a ministry in that benefice (although in these cases, discussions should take place about whether the priest with PTO might have a ministry elsewhere); or
- if the cleric has been causing difficulties pastorally and is hindering the regular ministry in a benefice.

8.9 PTO cannot be suspended. If the circumstances that led to the withdrawal of PTO change, then it may be possible to offer PTO again.

Not renewing PTO

8.10 Reasons for non-renewal may well be the same as those for withdrawing PTO. If circumstances change, PTO may be reoffered.

8.11 Making sure that the cleric understands what he or she will no longer be able to do without PTO needs to be done with care and understanding.

What clergy can do when they no longer have PTO

8.12 The ministry of clergy without PTO is more restricted than the ministry of a layperson and this is not always easy for clergy who have had a ministry with PTO to accept. The reason for this greater restriction is that ordination confers an authority and perceived trustworthiness that can give access into people's lives in a way which being a layperson may not, including the lives of those who are vulnerable. To exercise any of the ministries in the list below (para 8.13) could

convey the impression that the minister has the Bishop's PTO (and hence has had a DBS check and safeguarding training) when they do not. It is important to avoid this.

8.13 The activities that clergy without PTO are no longer be able to carry out include:

- Communion by extension
- Home Communion from the Reserved Sacrament
- Leading Retreats or Quiet Days
- Leading Lent Groups/ Bible Study/Home Groups / Alpha Groups, etc
- Participating in missions, acting peer reviewer in MDR, or leading CMD course
- Representing the Diocese or Church of England on bodies or visits
- Spiritual Direction or Accompaniment, where a PTO is a normal requirement
- Pastoral visiting in an official capacity as a priest, as opposed to as a neighbour or friend.
- Robing or processing during the Chrism Eucharist (although they may stand to renew their ordination vows).

8.14 However there are many things that clergy without PTO can still do (with permission from the Incumbent/Priest in Charge) for example:

- Holy Communion services: Read the lesson, lead prayers, administer communion if authorised to do so by the Incumbent and PCC.
- Service of the Word: Read the lesson, lead prayers.
- Midweek said Morning or Evening Prayer in church: Read the lesson, lead prayers
- Baptisms/Weddings: Read the lesson, lead prayers
- Funerals (in church/cemetery/crematorium): Read the lesson, lead prayers, give a personal tribute (not a sermon).
- Bible study/House group: attending as a member, but not leading
- Non-church related activities: Some things that clergy can do in retirement do not involve public ministry, are not directly connected with the diocese, and do not require permission to officiate, for example, writing books, doing voluntary work for Christian and other charities, or working for missionary societies at home or abroad.

8.15 Clergy without PTO should always undertake these roles unrobed.

9. Safeguarding training

9.1 The decision as to which safeguarding training pathway is chosen is a matter for the bishop, but this should be based on the responsibilities of the role and not on the lack of available training resources (such as not having a PTO Safeguarding training pathway).

9.2 The Bishop may wish to consult the Designated Responsible Person, the Rural/Area Dean and the DSA/O in identifying the level of involvement of an individual and therefore which safeguarding training pathway would be most appropriate.

9.3 If the role of someone on PTO involves leadership responsibilities, for example when covering a vacancy, they should undertake safeguarding training via the leadership pathway rather than the PTO pathway.

9.4 In other cases, PTO will be more appropriate, for example if the cleric:

- officiates, or takes Occasional Offices, all over the deanery or diocese as needed; or
- only provides cover or occasional help when the need arises in one parish or benefice but is not an integral part of the ministry team.

9.5 For those newly retired, the learning pathway individuals take should be decided at the point they start their new role. For existing PTOs, a formal decision based on consideration of a person's role would need to be made within the diocese.

10. Frequently asked Questions

Can PTO be given to someone has not completed IME2

10.1 Someone who has not been signed off as satisfactorily having completed their Initial Ministerial Education (IME2) training may in certain circumstances be eligible for PTO if they are able to demonstrate their eligibility and will receive the necessary supervision. The reasons for the non-completion of IME2 should always be ascertained and considered.

Can someone be given PTO after ill-health retirement

10.2 If someone is receiving a clergy pension before the pension age of 68 because they have retired early from stipendiary ministry on health grounds, this requires them to meet the definition under the ill health retirement provisions. The definition is this: 'You have a medical condition that prevents you from performing the duties of your office and this is likely to be permanent.' This does not prevent PTO from being granted to enable someone to undertake occasional services (which would not be undertaking the full role of a clergy office holder). However, it means that they are unlikely to be able to undertake significant ministry duties in the first instance, and that should be considered carefully in discussion with them and through any application for PTO. However, medical conditions can improve in the longer term and someone who has retired as a result of ill-health may be able to resume a ministry with PTO later.

11. Links to resources and guidance referred to in the text

Supporting clergy to prepare for retirement – guidance for bishops

https://www.churchofengland.org/sites/default/files/2022-04/1._supporting_retirement_prep_sept_21_final.pdf

Supporting ministry after retirement – guidance for bishops

https://www.churchofengland.org/sites/default/files/2022-04/2._supporting_ministry_after_retirement_sep_2021_final.pdf

Ministry after retirement – guidance for clergy

[https://www.churchofengland.org/sites/default/files/2022-04/ministry after retiring final final april 22.pdf](https://www.churchofengland.org/sites/default/files/2022-04/ministry%20after%20retiring%20final%20final%20april%2022.pdf)

The Parochial Expenses of the Clergy: A Guide to their Reimbursement

<http://www.churchofengland.org/clergy-office-holders/clergypay.aspx>

https://www.churchofengland.org/sites/default/files/2017-10/ac-age-limit-measure-guidance-for-website-october-2017_0.pdf

Overseas and Other Clergy (Ministry and Ordination) Measure 1967

Information about overseas PTO may be found on the Church of England website [here](#).

[A guide to Church of England Parochial Fees | The Church of England](#)

Safeguarding

Church of England Confidential Declaration Form

<https://www.churchofengland.org/sites/default/files/2023-03/cofe-cdf-feb-2023-emanual.docx>

<https://www.churchofengland.org/sites/default/files/2018-11/responding-to-safeguarding-concerns-or-allegations-that-relate-to-children-young-people-and-vulnerable-adults.pdf>

- [Responding to, assessing and managing concerns or allegations against church officers practice guidance \(2017\)](#)

[Safer Recruitment and People Management Guidance | The Church of England](#)

<https://www.churchofengland.org/safeguarding/safeguarding-e-manual/responding-well-victims-and-survivors-abuse>

[Safeguarding Serious Incident Reporting to the Charity Commission | The Church of England](#)

PERSONAL FILES RELATING TO CLERGY Policy for Bishops and their staff – being reviewed and not on website

Clergy Current Status Letter – being reviewed and not on website

Approval and review

Approved by	House of Bishops
Policy owner	House of Bishops
Policy author	Patrick Shorrock
Date	May 2025
Review date	March 2026

Revision history

Version no.	Revision date	Previous revision date	Summary of changes
1.0	2018		First version
2.0	2023	2018	Rewritten

APPENDIX 1 Licences as an alternative to PTO

1. With the exception of beneficed clergy, the bishop gives clergy authority to minister either by a licence or by PTO. Whether to give a licence or PTO will be, to some extent, a matter of judgement. In many cases, however, it will be clear: for example, where a house and/or stipend is provided for the better performance of the duties, PTO is never appropriate: a licence is required.
2. Where someone reaches 70 and holds office on a self-supporting part time basis and their role is not changing, or when someone is continuing in a leadership role, it may be appropriate for them to remain in office after reaching 70 and continue to hold a licensed or beneficed office. See the guidance issued by the Archbishops' Council on clergy over 70.
3. Whether a cleric with PTO is understood as operating mainly in one benefice or across a deanery, archdeaconry, or diocese, is something that varies between dioceses. If the cleric's ministry is centred on one benefice and the cleric is to be regarded as an integral part of the ministry team, it may be more appropriate for him or her to be given a licence, rather than PTO, even if he or she is over the retirement age of 70 and only officiates once or twice a month.
4. Similarly, it may be more appropriate for a cleric to hold office on a time limited basis rather than simply being given PTO if a cleric who has retired from office has a position of some responsibility in a parish, for example if leading a parish and chairing a PCC during a vacancy.

Main differences between clergy on licences and clergy with permission to officiate

	Licence on common tenure	Permission to officiate
Clergy over 70 years of age	<p>May only be issued with a licence for a fixed period.</p> <p>The bishop is required to have regard to guidance issued by the Archbishops' Council, and to issue the relevant direction to enable them to hold office.</p>	There are no different legal provisions for PTO for clergy over 70. The period of the PTO will be linked to the period of the DBS check
Rights and responsibilities	Rights and responsibilities are conferred by the Ecclesiastical Offices (Terms of Service) Measure and Regulations, unless the cleric carries out his or her duties entirely under a contract of employment, in which case the Regulations do not apply.	No rights and responsibilities under the Terms of Service legislation.
Ministerial Development Review (MDR)	The bishop is required to have in place a scheme that arranges for the bishop (or someone nominated by him or her) to carry out ministerial review at least once every two years on all licensed ministers (unless their ministry is carried out entirely under a contract of employment).	<p>There is no legal requirement for MDR, although this does not prevent the cleric from participating in MDR if this is agreed by the bishop and the cleric.</p> <p>It can be helpful for Clergy on PTO to have an annual review with the Designated Responsible Person</p>

Continuing Ministerial Development (CMD)	There is a legal requirement to participate in arrangements approved by the diocesan bishop.	No legal <i>requirement</i> to participate in CMD but a requirement to participate in safeguarding training (see below). However, offering CMD appropriate to someone's particular responsibilities can be helpful.
Safeguarding training	Required	A requirement to participate in relevant safeguarding training which will be the PTO pathway or the leadership pathway
Documentation	<ul style="list-style-type: none"> • Licence • Statement of Particulars • Bishop's direction (only required for clergy after 70) 	<ul style="list-style-type: none"> • A letter from the bishop giving permission to officiate and providing information about <ul style="list-style-type: none"> ▪ Whether payment may be claimed for pastoral services; ▪ The processes for claiming such remuneration and the importance of HMRC declaration; ▪ Safeguarding requirements (including the need to have a valid DBS check and participate in and satisfactorily complete safeguarding training) ▪ the requirement to inform the incumbent or priest-in-charge of the benefice in question and seek his/her goodwill so far as is practicable where the Occasional Offices are concerned ▪ the name of the Designated Responsible Person; ▪ Arrangements for review/renewal of PTO (including when renewal of DBS check is due); ▪ Expectations agreed with the Designated Responsible Person

Specified time off/hours of work	As set out in the statement of particulars, which may refer to the role description	Not specified
Role description	Safer Recruitment and People Management guidance requires a role description	Generic Diocesan Role Description required. If a detailed role description is required, it may be more appropriate for a licence to be issued.
Entitlement to Housing	Yes – unless stated otherwise in the Statement of Particulars	No entitlement to housing. If housing is provided, permission to officiate is not sufficient, and a licence should be issued.
Does the Clergy Discipline Measure apply?	Yes	Yes, but there is no requirement to initiate CDM proceedings before withdrawing PTO
Membership of PCC and Deanery Synod?	Membership of PCC and deanery synod is ex officio.	<p>Clergy with PTO may be co-opted onto the PCC or deanery synod.</p> <p>In the absence of an incumbent or during a vacancy, the bishop may authorise a cleric with PTO to act as chair of the PCC, if the PCC so requests the bishop.</p> <p>Clergy with PTO have the statutory right to elect one of their number (for every ten or less in a deanery) onto the House of Clergy of the deanery synod. Where a cleric with PTO has been elected to the deanery synod, it is appropriate for them to be co-opted onto the relevant PCC.</p>
Sickness reporting	Licensed clergy (whether stipendiary or not) are legally required	There is no legal requirement to report sickness, although clergy with PTO should inform the Designated Responsible Person and possibly their incumbent/priest

	<ul style="list-style-type: none"> ▪ to supply the bishop's designated officer with a medical certificate for sickness absence of more than 7 days ▪ to use all endeavours to make arrangements for the duties of the office to be performed by another person. 	in charge (if not the Designated Responsible Person) and/or area/rural dean.
Circumstances in which the licence or permission to officiate may come to an end	<ul style="list-style-type: none"> • Resignation with three months' notice • Retirement • Pastoral reorganisation which results in loss of office • Following capability or disciplinary proceedings • On reaching 70 • When the licence comes to an end and is not renewed. Where the licence is for a fixed or limited term, this must be stated in the SOP. (Clergy over 70 may only be licensed for a fixed or limited term, which may be extended or renewed.) 	<p>On the decision of the cleric</p> <p>When the bishop decides to withdraw it or not renew it</p> <p>There is no legal requirement to provide notice to terminate a PTO or an appeal process.</p>
Capability procedure	In cases where the cleric is not performing to an acceptable standard, it is possible to invoke the formal capability procedure, which may lead to removal from office if the cleric fails to improve.	PTO would be withdrawn if a cleric were no longer capable of carrying out their ministry to an acceptable standard

APPENDIX 2 PTO and retirement

1. It is important to encourage stipendiary clergy and other clergy who live in a house provided for the better performance of their duties to plan in good time for their retirement, which will involve finding a place to live and moving to a new house. See Ministry after retiring from office for a possible timeline.
2. Clergy moving from one diocese to another may find it helpful if they take the initiative and inform the new diocese about their move.
3. Some bishops may require stipendiary clergy to take an extended break at retirement and give themselves time to settle into their new house and adjust to no longer being in charge of a benefice. This will enable them to build links with local clergy and people in the deanery and diocese and develop a clearer picture of what kind of ministry they might have in retirement before they apply for PTO. This requirement will not be appropriate for SSM clergy who reach 70 and are remaining in their current parish and continuing to carry out a similar role to that before they were 70.
4. Many stipendiary clergy will be willing to take a break in this way on retirement, but some may wish to continue to exercise an authorised ministry without a break and be able to preside at the Eucharist and preach as soon as they retire from office. If they wish to do this, and the Bishop agrees, they will need to apply for PTO in good time, and to have developed a relationship with the incumbent of their new parish or benefice in advance of retirement.
5. Expectations of the ministry the priest will have in retirement should be agreed with the Designated Responsible Person, who will usually be the incumbent or priest in charge. These can then be reviewed and updated as the retired cleric's ministry changes and develops.
6. Regular review is particularly important in the case of retired clergy, where the health of the retired cleric is subject to change. Sometimes it will be more appropriate to review ministry on an annual basis. However, it should not be assumed that the ministry a retired cleric can offer will only reduce or that annual review will necessarily lead to PTO not being renewed. Moving to annual review should not be done simply because the cleric has reached a particular age.
7. Bishops should encourage the Designated Responsible Person to be open to considering whether arrangements can be made, when necessary (such as having a trained server on hand), to enable clergy to continue to preside at the Eucharist. In this case the statement of agreed expectations would record what arrangements need to be in place for them to preach or preside.
8. Self-supporting ministers (SSMs) will also retire from office at 70 and, if they apply for it and it is granted, move onto PTO, although the focus of their ministry may remain in the parish or benefice where they are currently ministering. Such SSMs should be encouraged to apply for PTO in good time before their 70th birthday.
9. In some cases, it may be that retirement from secular employment gives SSMs more time to exercise their ministry. It is important therefore to review the ministry that they might offer when they retire from secular employment and consider whether they should retire from office and move to PTO or continue to hold office.

10. There are advantages to offering retired clergy CMD that is appropriate for their particular ministry.

APPENDIX 3 Summary of process of granting PTO

<p>(i) Exit interview Cleric settles and decides on their home church and discusses with the incumbent the possibility of a PTO based in that benefice.</p> <p>(i) Applicant completes an application form for PTO including the Church of England Confidential Declaration form</p>	
<p>(ii) Safeguarding checks when someone applies for PTO in a diocese where they have, or recently (say within the last year) have had, a ministry:</p> <p>(1) Bishop reviews the Clergy File and identifies any issues and checks with the DSO.</p> <p>(2) If DBS check is still valid (less than 3 years old), it is not necessary to submit a new application, and the PTO will be issued for the period that the DBS check has left to run.</p> <p>(3) If all required safeguarding training is up to date, then further training not required until refresher due.</p> <p>(iii) Bishop assesses suitability of applicant for PTO</p> <p>(iv) Bishop agrees the scope of the PTO role and any geographical restrictions</p> <p>(v) Bishop designates someone to be responsible for the ministry of cleric granted PTO</p> <p>(vi) Cleric agrees mutual expectations with Designated Responsible Person</p> <p>(vii) Bishop issues PTO</p>	<p>(iii) Safeguarding checks when someone applies in a new diocese:</p> <p>(1) enhanced DBS with barred list check application submitted</p> <p>(2) Clergy Current Status Letter (CCSL) and episcopal reference are requested from bishop of sending diocese.</p> <p>(3) Sending bishop reviews the Clergy File and checks with the DSO as part of that process</p> <p>(4) Interview with a member of the receiving bishop's staff or area/rural dean</p> <p>(iv) Receiving Bishop assesses suitability of applicant for PTO and checks Archbishops' List</p> <p>(v) Bishop agrees the scope of the PTO role and any geographical restrictions</p> <p>(vi) Bishop designates someone to be responsible for the ministry of cleric granted PTO</p> <p>(vii) Cleric agrees mutual expectations with Designated Responsible Person</p> <p>(viii) After PTO is approved, but before it is granted, an induction into diocesan safeguarding policies and procedures,</p> <p>(ix) Bishop issues PTO</p> <p>(x) Member of bishop's staff/Chaplain and DSO review the Clergy File¹ (when received) and obtain further references if there are any concerns</p>

¹ Unless this is kept in another diocese where the main part of the cleric's ministry is exercised

APPENDIX 4 Model Application Form for Permission to Officiate

CONTACT DETAILS

TITLE				
NAME				
ADDRESS				
PHONE NUMBER				
E-MAIL ADDRESS				
DATE OF BIRTH				
ARE YOU RETIRED?	Yes/No	ARE YOU IN RECEIPT OF A CHURCH OF ENGLAND PENSION?		Yes/No
IF NOT RETIRED, WHAT IS YOUR OCCUPATION?				

EXISTING AND PREVIOUS MINISTRY

Are you currently beneficed, licensed, or employed under contract in another Diocese?		Yes/No
If yes, please give details of Diocese and post		

Do you currently hold PTO in another Diocese?		Yes/No
If yes, please give details		
Please give details of any PTO granted in another Diocese which is not current		
Please give details of any application for PTO which has been refused, and the reasons why		

SAFEGUARDING INFORMATION

		Office use – date verified
Date of Last DBS Check		
Date and level of last Safeguarding Training		
Confidential Declaration	Please complete and attach the Confidential Declaration (see notes)	

MINISTRY INTENTIONS

How are you hoping to use your PTO?	
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DECLARATIONS

Before you sign the Application, please read the following Declarations. By signing the form, you are stating your agreement to abide by them.

- I acknowledge that, in accordance with Canon C1, I will owe canonical obedience to the Bishop of _____ and his/her successors in all things lawful and honest if PTO is granted.
- I understand that it is my responsibility to inform the Bishop's office of any changes in my personal details.
- I understand that I must not officiate without the permission of the relevant incumbent or priest in charge or in the case of a vacancy the churchwarden or area/rural dean.
- I understand that before taking a service in a crematorium or cemetery I must seek the goodwill of the deceased's incumbent so far as practicable.
- I understand that PTO is granted at the discretion of the Bishop and may be withdrawn at any time.
- I understand that PTO cannot be granted if I have been barred from regulated activity with children or vulnerable adults. My DBS certificate must be deemed satisfactory according to relevant House of Bishops' guidance.
- I acknowledge that I am legally required to have due regard to the House of Bishops' guidance in relation to the safeguarding of children and vulnerable adults and I will accordingly undertake such safeguarding training as the Bishop requires.
- I understand that the Bishop's letter of authorisation if granted will specify the length of time for which I may exercise PTO with any relevant geographical restrictions, after which I must apply for renewal.
- If my PTO has lapsed for any reason, I agree that I will not undertake any forms of ministry until all matters have been resolved.
- I understand that my name will be passed to the Archbishops' Council for entry on the national register of clergy which is available to the public. In accordance with the National Ministry Register (Clergy) Regulations 2020.,

Fees and occasional offices:

- I understand that fees for funerals and weddings must be paid in full to the relevant DBF and/or PCC, and that it is not lawful for me to retain any fee that is payable to the DBF and/or the PCC without the agreement of the DBF and/or PCC.

If there is a diocesan policy about the payment of fees to clergy with PTO, it should be inserted here

- If I am retired [and in receipt of a Church of England pension], the DBF may agree that I may receive a proportion of the fee.
- I understand that, as a clerk in holy orders, I may only use the forms of service authorised by Canon and that I may not exercise ministry or take funerals (or accept fees for taking funerals) in a private or unofficial capacity.

Personal Data Declaration

- I have read and understand the Privacy Notice for Permission to Officiate (in the notes for guidance about applying for PTO) which details how my PTO application will be managed and my rights with respect to the information I provide.

Signed:		Date:	
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DECLARATION BY INCUMBENT/PRIEST IN CHARGE/RURAL DEAN

Having discussed this application with _____, I support and commend it _____

Signed:		Date:	
TITLE			
NAME			
POST			
PHONE			

NUMBER	
E-MAIL ADDRESS	

SUBMITTING THE APPLICATION FORM

Once you have completed this form, please post it to _____

attaching a Church of England Confidential Declaration Form

<https://www.churchofengland.org/sites/default/files/2023-03/cofe-cdf-feb-2023-emanual.docx>

You will also need to apply for a new DBS check.

APPENDIX 5 Model Privacy Notice – Diocesan Permission to Officiate

This privacy notice is provided by the Bishop of [xx] to explain what to expect when we collect and process your personal information to issue you with Permission to Officiate (PTO) in accordance with the UK GDPR [and the EU General Data Protection Regulation (GDPR)²].

Data controller(s)

The data controller is the Bishop of [xx] (contact details below). This means the bishop decides how your personal data is processed and for what purposes.

For further information on the xxx please go to: [insert hyperlink to the bishop's website].
(Optional)

1. Why we collect and use your personal data

Personal information is collected for the following purpose/s:

- To assess suitability for ministry under Canon C8(3) and the Safer Recruitment Policy (Code of Practice).
- To issue clergy with written PTO.
- To manage the processes for granting, reviewing, renewing, refusing, not renewing, and withdrawing PTO and to correspond with clergy about these matters.
- To provide effective arrangements for the oversight of clergy on PTO
- To provide details of clergy with PTO to the Archbishops' Council for inclusion in, or removal from, the National Register of Clergy.
- To keep a record of the skills and experiences of clergy with PTO to enable these to be used to contribute to the mission and ministry of the Church
- To review information from the Designated Responsible Person about the ministry of clergy with PTO.
- To enable the bishop to make decisions about the deployment of clergy with PTO in the diocese.
- To provide pastoral support.
- To enable the bishop to assess training needs and record training completion.

2. Personal and special category data collected

2a. We collect from you:

Data included as part of the following processes:

- Application for PTO/OPTO, e.g. name, contact details, experience, training etc.
- Safer Recruitment e.g. Confidential Declaration Form
- Statement of expectations agreed with the Designated Responsible Person
- Exit interview

Special category data

- Religious belief as revealed by ordination
- Health

² Include this only if the data controller is outside the UK.

2b. We collect from 3rd parties:

- Data provided by a bishop as part of the CCSL process.
- DBS Enhanced Plus Check of the Barred List

3. The lawful basis for using your information

We collect and use your personal data under the following lawful bases³:

Personal data

- Public task - (Canon C8); Safeguarding Policies (Safer Recruitment); PTO Policy
- Legal obligation – National Register, OPTO

Special categories & criminal offence information

- Legitimate activity – religious belief and health
- DBS or overseas criminal checks – Schedule 1, Part2, Para 11 – protecting the public, Substantial Public Interest - DBS and criminal records checks

4. Who we share your information with:

The bishop will not share your data with any other third parties except where specified here. We will be sharing your information with:

- The Archbishops' Council – for the purposes of the National Register
- The Designated Responsible Person
- Bishops' chaplains or other members of the bishops' staff
- Area deans or archdeacons
- Diocesan Safeguarding Advisor/Officer
- DBS or relevant overseas regulatory or statutory authority – for purpose of criminal records checks
- Retired Clergy Officers

5. Your personal data will/will not be sent to countries outside the UK/EEA⁴.

[Insert details of safeguards in place when sending data outside the UK/EEA, including details of your EU representative if applicable.]

6. How long do we keep your information?

³ The Dioceses of Sodor and Man and Salisbury (in respect of clergy in Jersey and Guernsey) and the Diocese in Europe should check and amend the lawful bases and conditions as necessary to comply with relevant data protection legislation

⁴ If you are intending to send data outside the UK or EEA, please discuss with the Data Processing Officer. This includes using hosted services or data processors which are based outside the UK.

Data relating PTO will be kept in the Clergy File and retained in accordance with the Clergy File Retention Schedule.

Your rights

You have the following rights regarding your personal data:

- The right to be informed about any data we hold about you.
- The right to request a copy of your personal data which we hold about you.
- The right to request that we correct any personal data if it is found to be inaccurate or out of date.
- The right to request your personal data is erased where it is no longer necessary for us to retain such data.
- The right, where there is a dispute in relation to the accuracy or processing of your personal data, to request a restriction is placed on further processing.
- The right to object to the processing of your personal data (data that is processed under Public Task).

To exercise these rights, please contact the [insert contact details].

You have the right to make a complaint at any time to the Information Commissioner, online at: [Data protection and personal information complaints tool | ICO](#), or by phone on 0303 123 1113 (local rate).

APPENDIX 6 SUMMARY OF MINISTRY UNDERTAKEN

PTO MINISTERIAL RETURN

Name:

Parish:

Designated person responsible for oversight: Revd

DBS clearance last carried out on:

DBS valid until:

PTO expires on:

In addition to my own parish, I have provided ministry in the following parishes with the permission of the Diocesan Bishop and relevant incumbent/priest in charge

Any additional comments from Designated responsible person

APPENDIX 6 Model Application Form for Renewal of Permission to Officiate

Alternatively, this can be done by the Designated Responsible Person providing feedback on the Cleric's ministry. See Appendix 6 A.

CONTACT DETAILS

TITLE			
NAME			
ADDRESS			
PHONE NUMBER			
E-MAIL ADDRESS			
DATE OF BIRTH			
ARE YOU RETIRED?	Yes/No	ARE YOU IN RECEIPT OF A CHURCH OF ENGLAND PENSION?	Yes/No
IF NOT RETIRED, WHAT IS YOUR OCCUPATION?			
DO YOU HOLD PTO IN ANOTHER DIOCESE?			
IF YOU DO, PLEASE			

PROVIDE DETAILS	
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LOCAL CHURCH & SAFEGUARDING INFORMATION

Parish, Benefice or Mission Community	
Name of your designated minister (Incumbent, Priest-in-Charge or Rural/Area Dean)	
Current PTO issued on (date)	
DBS expires (date)	
Safeguarding Training undertaken (date)	

A summary of ministry undertaken can be added to the renewal form here. Please see Appendix 5 for an example

5) I have reviewed my ministry each year with _____ and a new signed and dated copy of my Statement of Agreed Expectations is attached.

(NB: if nothing in your Statement of Agreed Expectations needs revising, please still sign and date a new copy and submit that with your application)

DECLARATIONS

Before you sign the Application, please read the following Declarations – by signing the form you are stating your agreement to abide by them.

- I acknowledge that, in accordance with Canon C1, I owe canonical obedience to the Bishop of _____ and his/her successors in all things lawful and honest.
- I understand that it is my responsibility to inform the Bishop's office of any changes in my personal details.
- I understand that I must not officiate without the permission of the relevant incumbent or priest in charge or in the case of a vacancy the churchwarden or area/rural dean.
- I understand that before taking a service in a crematorium or cemetery I must seek the goodwill of the deceased's incumbent so far as practicable.
- I understand that PTO is granted at the discretion of the Bishop and may be withdrawn at any time.
- I understand that PTO cannot be granted if I have been barred from regulated activity with children or vulnerable adults. My DBS certificate must be deemed satisfactory according to relevant House of Bishops' guidance.
- I acknowledge that I am legally required to have due regard to the House of Bishops' guidance in relation to the safeguarding of children and vulnerable adults and I will accordingly undertake such safeguarding training as the Bishop requires.
- I understand that the Bishop's letter of authorisation if granted will specify the length of time for which I may exercise PTO with any relevant geographical restrictions, after which I must apply for renewal.
- If my PTO has lapsed for any reason, I agree that I will not undertake any forms of ministry until all matters have been resolved.
- In line with the House of Bishops' policy on PTO, I agree that my name will be passed to the National Churches Institutions for entry on a national register which will be available to the public.

Fees and occasional offices:

- I understand that fees for funerals and weddings must be paid in full to the relevant DBF and/or PCC, and that it is not lawful for me to retain any fee that is payable to the DBF and/or the PCC without the agreement of the DBF and/or PCC.

If there is a diocesan policy about the payment of fees to clergy with PTO, it should be inserted here

- If I am retired [and in receipt of a Church of England pension], the DBF may agree that I may receive a proportion of the fee.

- I understand that, as a clerk in holy orders, I may only use the forms of service authorised by Canon and that I may not exercise ministry or take funerals (or accept fees for taking funerals) in a private or unofficial capacity.

Personal Data Declaration

- I have read and understand the Privacy Notice for Permission to Officiate (in the notes for guidance about applying for PTO) which details how my PTO application will be managed and my rights with respect to the information I provide.

Signed:		Date:	
---------	--	-------	--

DECLARATION BY INCUMBENT/PRIEST IN CHARGE/RURAL DEAN

Having discussed this application for renewal of PTO with _____, I support and commend it.

Signed:		Date:	
TITLE			
NAME			
POST			
PHONE NUMBER			
E-MAIL ADDRESS			

Appendix 6A PTO Renewal when done via feedback from the Designated responsible person

PTO Renewal Feedback

Name of Minister:			
Email:		Phone:	
Date PTO renewed:		Renewal of DBS due:	
Date Safeguarding training completed			Level
Area of Ministry:			
Benefice:			
Deanery:			
Personal Place of Worship:			
Designated Person:			
Summary of Current Ministry (to be completed in consultation with the Minister)			
Comments about future ministry (to be completed in consultation with the minister):			

Further comments for the Bishop by designated person (including details if PTO is not to be renewed):

I recommend that PTO be renewed: Yes/ No

Signed:

Date:

APPENDIX 7 Model Permission to Officiate and generic diocesan role description

I _____ Bishop of _____

Give permission to the Revd _____

To officiate within the diocese of _____

This permission is subject to

the conditions attached

any further geographical restrictions below.

This permission will expire on _____

In order for this permission to be renewed, arrangements will need to be made to apply for
DBS clearance by _____

These details will be shared with the National Church Institutions to enable them to
maintain a national register of authorised clergy.

(Signed) + _____

Date _____

Conditions under which PTO is granted

General

All clergy who wish to exercise public ministry, other than in licensed or beneficed roles, must be granted permission to officiate by the Diocesan Bishop.

If you wish to hold permission to officiate (PTO), you must apply to The Bishop's Office. Such permission is normally for 3 years and will only be granted once your diocesan safeguarding training is up to date. PTO gives you authority to minister in any parish in the diocese at the invitation of the Incumbent or Priest in Charge, subject to any geographical restrictions in your PTO.

When PTO is due for renewal, you will need to apply for renewal using the appropriate form which must be countersigned by the relevant Incumbent /Priest-in-Charge (Area/Rural Dean if in interregnum) and returned to the Bishop. Please note that the PTO will expire unless a formal extension is obtained following an application to renew.

Designated responsible person

The Bishop has designated someone to be responsible for the immediate oversight of your ministry.

The Designated Responsible Person will

- Meet you and agree expectations of the work that you will do;
- Review these expectations from time to time and whenever your PTO is due for renewal;
- Discuss the ministry you have carried out regularly;
- Ensure that a written record of the ministry you have undertaken is sent to the bishop regularly, along with any change in the expectations;
- Either recommend, where appropriate, and subject to the relevant safeguarding checks, that the bishop renews your PTO when the current term is due to expire, or explain to the bishop why they do not consider that your PTO should be renewed; and
- Ensure that the bishop is kept informed about any issues or health problems, particularly when you might require additional pastoral support, or it might be necessary to consider withdrawing PTO.

The Designated Responsible Person will usually but not always be the incumbent or priest in charge of the benefice where you live or worship, or, in their absence, the area/rural dean.

Agreed statement of expectations

If you are carrying out regular duties in a parish or benefice, you should agree what duties you are expected to cover, as it is helpful for both you and those you are helping if there is a common understanding of what you are willing and able to do and for this to be recorded in writing. This agreement is not binding, may be changed at any time, and should be reviewed regularly.

Ministerial Return

You should include a ministerial return setting out briefly the ministry you have undertaken when you request renewal of PTO.

Regular review

You should review your ministry regularly with the Designated Responsible Person. As part of this review, you should

- Look at the agreed expectations
- Consider if you might wish to expand your role or approach the diocese to see if you can provide further assistance
- Consider whether might be appropriate to find a mutually agreed way to vary or reduce your workload or to discuss an end to your PTO, for example if you are in poor health.
- Explore whether you have any particular training needs.

Expenses and fees

All expenses of formal ministry by retired clergy, including pastoral visits for weddings, funerals and other reasons, should be reimbursed in full by the PCC or equivalent.

Expenses should be the actual cost or mileage at the current rates of approved mileage allowance payments set by HM Revenue and Customs. Further details can be found in the Booklet; The Parochial Expenses of the Clergy: A Guide to their Reimbursement

<http://www.churchofengland.org/clergy-office-holders/clergypay.aspx>

It has been agreed in this diocese that the proportion of the fee due to the DBF that you may receive when carrying out the Occasional Offices is %.

You must not carry out funerals without informing the deceased person's incumbent or priest in charge and seeking their good will.

The procedure for receiving these fees is as follows.....

You are reminded that it is your responsibility to declare any payments for taking services to HMRC.

Payments for occasional cover (not occasional offices)

These are not normally made when you take a service in the church where you normally worship and may be limited to two a day. Other conditions are....

Sickness Reporting

There is no legal requirement to report sickness, although you should inform the Designated Responsible Person and keep the area/rural Dean informed.

Continuing Ministerial Development (CMD)

There is no specific legal requirement to participate in arrangements approved by the Diocesan Bishop. However, failure to participate in CMD matters such as safeguarding when required by the Bishop can be a disciplinary offence and could lead to the Bishop withdrawing your PTO.

Circumstances in which PTO may come to an end

Your Permission to Officiate is held at the Bishop's discretion and may be withdrawn at any time. It is subject to regular review after which it may be renewed.

Clergy Discipline Measure

The Clergy Discipline Measure applies to all clergy, however their ministry is authorised, and continues to apply when they are no longer active in their ministry.

Personal Files

In accordance with The House of Bishops' guidance on Personal Files relating to Clergy (June 2021), paras 87 and 89 apply to clerics who have PTO.

- (87). Where a cleric retires, the personal file should remain in the diocese in which they last served unless and until they are granted permission to officiate ('PTO') in another diocese.
- (89). Where a cleric holds a licence or PTO concurrently in more than one diocese, the personal file should be held in the diocese where the priest exercises the greater part of their ministry. A note should be kept on the file as to which other dioceses have issued a licence or PTO and the expiry date(s); and arrangements put in place for the appropriate staff of those dioceses to have access to the file as necessary. The other dioceses should in turn keep a record of where the personal file is held.

Safeguarding

The Bishop will require all clergy with PTO to undertake appropriate diocesan safeguarding training before granting permission to officiate. It will be a disciplinary offence not to attend safeguarding refresher training in the diocese when requested by the bishop.

- You must have a valid DBS check, and the period of your PTO must not exceed the period of your DBS check;
- You must abide by House of Bishops' and diocesan policies and procedures in safeguarding children and adults, and observe the implementation of procedures in the parishes in which you serve;
- You are accountable to and must share information with the Designated Responsible Person or Area/Rural Dean or Archdeacon, on all safeguarding matters;
- You are subject to the same processes as any other ordained person in the event of an allegation of past or current abuse by a child or an adult being made against them;
- You are required by law to have due regard to the House of Bishops guidance relating to the safeguarding of children and vulnerable adults and must therefore read and familiarise yourself with the House of Bishops' Safeguarding policies as well as those of this diocese, and undertake the relevant training as approved by the Bishop.
- If you let your safeguarding training expire and thus have PTO withdrawn, you will need to explain why the training expired before PTO will be reinstated.

APPENDIX 8 Model statement of agreed expectations

Name of Deanery

Name of Parish

Extent and Nature of Assistance provided by The Revd [Name of Cleric]

To recognise the ministry of The Revd [Name of Cleric]

in the context of his/her Permission to Officiate (PTO), in support of ministry in the parish or benefice of [Name of Parish/benefice]

Ministry Support

- --- days/hours each week across the parish/benefice and churches
- To minister alongside and in support of the incumbent/priest in charge, as set out below
- There is no requirement to attend PCC meetings

Sunday Services

- Up to --- Sundays each month:
[Name of Church A] – 8.00am and 11.00am
[Name of Church B] – 9.30am

Midweek Services

– frequency to be agreed

Occasional Offices

- Baptisms, Funerals and Marriages, as requested by the incumbent/priest in charge, to include ongoing pastoral care, as appropriate

Pastoral Care

- Provision of pastoral care with regard to church members and parishioners, as requested by incumbent/priest in charge

Expenses

- Ministry Support – Mileage, Telephone usage, Postage, Sundry Administration, in agreement with the Churchwardens
- Sunday and Midweek Services – Fee allocation and mileage
- The Occasional Offices – Fee allocation and mileage

Review

This agreement will be reviewed on _____.

Signed _____ Designated Responsible Person

Signed _____ (with PTO)

