

# House of Bishops Policy on Permission to Officiate (PTO)

## Policy summary

### Policy summary

This policy (and its additional guidance and templates) is designed to assist bishops in

- 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;
- managing the processes for granting, reviewing, renewing, refusing, not renewing and withdrawing PTO (including safeguarding checks in line with Safer Recruitment Guidance).

It sets out how PTO works and provides details of the relevant safeguarding training pathways and the process for granting Overseas PTO.

This policy sets out what Bishops must do when overseeing clergy with PTO and is supported by further guidance.

Links to other relevant material are provided in section 11 of the guidance.

This policy has been issued on a trial basis probably until February 2026, when the General Synod will be asked to approve the new Safer Recruitment Code of Practice.

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# Introduction

1. The ministry of clergy with PTO is valuable and of enormous benefit to the Church. It may be less structured than the ministry of clergy holding office, varying considerably, both from place to place and also during the course of someone's ministry, particularly after retirement from office. This document provides a clear policy framework supported by guidance, which enables clergy with PTO to provide a flexible and fruitful ministry.

## Purpose

2. To ensure that
  - the Bishop provides oversight of all clergy to whom the Bishop has given PTO;
  - clergy with PTO (including retired clergy with PTO) are enabled to exercise an effective and fruitful ministry;
  - arrangements are in place to update the Register, particularly when PTO is withdrawn or not reviewed;
  - the process for issuing, reviewing, and withdrawing PTO is carried out in accordance with the Safer Recruitment Guidance;
  - appropriate training (particularly safeguarding training) is provided for clergy on PTO;
  - clergy do not exercise any ministry in their former benefice unless specifically invited by the incumbent or priest in charge.

## Scope

3. This policy applies to all Bishops (as defined below) who are giving PTO and exercising oversight of clergy with PTO, as well as to clergy who are applying for and who are granted PTO. They all must follow this policy. Readers and licensed lay ministers are sometimes described as having PTO, but this policy only applies to clergy. The current requirements for Forces chaplains are set out in a recent email from the Bishop to the Armed Forces. However, these requirements will be subject to change if draft legislation, brought before the General Synod in July 2025, receives Parliamentary Approval.

## Definitions

Defined terms – the following terms are used throughout the policy and have the meanings described here. Capital letters are used to indicate that a term is used as defined here.

**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.

## Policy

### Policy statement

This policy sets out best practice and legal obligations for all bishops who must comply with its terms.

This policy must be read in conjunction with the Guidance.

Other relevant policies, Canons, Regulations, or codes of practice are referenced where they relate directly to the management of PTO. A list of these is provided in the Guidance.

## 1. How PTO works

- 1.1 Canon C8 of the Canons of the Church of England provides that a minister duly ordained as priest or deacon (referred to as a cleric throughout this policy) may only officiate (which includes robing: see definition above) in any place after the minister has received authority to do so from the bishop of the diocese.
- 1.2 It is unlawful for a member of the clergy to officiate or robe (see the definition above) without the requisite authority.
- 1.3 Bishops must not invite clergy to exercise any public or official ministry unless they have authorised them to do so. This includes
  - spiritual direction;
  - mentoring as part of a diocesan scheme;
  - conducting retreats or quiet days;
  - acting as an outside consultant/teacher/facilitator for parishes (e.g. for PCC away days, stewardship campaigns, Lent groups, and house groups); and
  - participating in missions, staffing Continuing Ministerial Development and ordination courses, or participating as a peer reviewer in MDR.
- 1.4 Clergy are often authorised to minister by virtue of holding office (which may be licensed or beneficed). PTO enables clergy who do not hold an office or a general licence to officiate when invited.
- 1.5 PTO may sometimes be restricted to a particular location, for example a single benefice or deanery. See paragraphs 3.18-19.
- 1.6 In addition, the minister with cure of souls may, under Canon C8.2(a), *without reference to the bishop*, “allow a minister, concerning whom they are satisfied either by actual personal knowledge or by good and sufficient evidence” to be of good life and standing and to have authority to officiate in the same diocese *or another diocese*, to minister in their church *for a period of not more than 7 days within a period of 3 months*. Clergy must check the standing of clergy via the Register.
- 1.7 This provision also includes clergy authorised for ministry in the Church in Wales, although clergy in England wishing to invite Welsh Clergy to minister will need to check with the relevant bishop that they are in good standing by using the email [bishop\[diocese\]@churchinwales.org.uk](mailto:bishop[diocese]@churchinwales.org.uk), as the National Register does not include clergy in the Church in Wales.
- 1.8 Clergy and those acting as Sequestrators when a benefice is without an incumbent or priest in charge must check that someone has the relevant authority before inviting them to officiate. This should be done by consulting the Register.
- 1.9 Any member of the clergy who officiates without the requisite authority, and any minister who permits another member of the clergy to do so, is liable to proceedings under the CDM.

- 1.10 Clergy from overseas must have OPTO to enable them to apply for PTO. See paragraphs 2.20 – 2.23 and Appendix 3.
- 1.11 The Bishop is responsible for issuing PTO but may formally delegate the function of granting PTO to a suffragan bishop serving in the diocese. See the definition of Bishop above. PEVs may recommend to a Bishop that PTO be given, but the relevant safeguarding checks – along with the final decision – must be made by the Bishop.

## 2. Basic Principles of PTO

- 2.1 Ministry under PTO requires the permission of the incumbent or priest in charge of the benefice where they will be exercising a ministry (or in the case of a Vacancy, the area/rural dean and churchwardens).
- 2.2 Clergy who are licensed/beneficed in the diocese may officiate throughout that diocese by virtue of that authority, provided that they also have the permission of the incumbent or priest in charge of the benefice where they will be exercising a ministry.
- 2.3 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 of mileage at the current rates of approved mileage allowance payments set by HM Revenue and Customs.
- 2.4 The House of Bishop's Safer Recruitment Guidance (including its requirements for DBS checks) must be applied to clergy who apply for PTO.
- 2.5 PTO must not be issued unless there is a valid enhanced DBS with Barred List check in place. Under the Safer Recruitment Guidance, DBS checks must be renewed every three years. PTO must be issued for a fixed term of no longer than 3 years, which must not exceed the period for which the DBS check is valid.
- 2.6 Clergy who resign their office must cease professional relationships with those formerly under their pastoral care (unless they are self-supporting clergy who have reached retirement age, are not moving away from the place where they live, and have been given PTO by the Bishop). Bishops should remind clergy of this when they retire from stipendiary ministry.
- 2.7 Bishops must ensure that arrangements are in place for the ongoing oversight of clergy with PTO.
- 2.8 Bishops are responsible for ensuring all relevant details are kept up to date on the People System and Register including when PTO expires and is not renewed and when it is withdrawn.

### *PTO in more than one diocese*

- 2.9 Clergy may have PTO in more than one diocese. Before granting PTO to a cleric who already has it in another diocese, Bishops must check whether it is actually required. Where someone already has PTO, a further PTO is not needed for ministry in another diocese unless the ministry will involve more than 7 occasions in three months. See Canon C.8.2 and paragraph 1.6.

2.10 If the Bishop who holds the Clergy File is granting PTO and will retain the Clergy File because the principal focus of cleric's ministry is going to continue in that diocese, the Bishop must

- check whether the cleric holds PTO or office in any other diocese by checking the Register
- keep a record of any other dioceses where PTO has been granted
- inform the bishops of the other dioceses where PTO has been granted
  - that the Bishop has granted PTO
  - that the Bishop is retaining the Clergy File
  - that they will need to make copies of relevant papers and send them to the Bishop who holds the Clergy File
  - that PTO has expired or been withdrawn in that diocese, and they will need to arrange a review of PTO in their diocese.

2.11 If a Bishop has granted PTO but the Clergy File is situated in another diocese where the main focus of the cleric's ministry will be, the Bishop who does not have the Clergy File must

- check whether the cleric holds PTO or office in any other diocese by checking the Register
- keep a record of any other dioceses where PTO has been granted
- inform the Bishops of the other dioceses where PTO has been granted that the Bishop has granted PTO
- provide copies of relevant papers and send them to the Bishop who holds the Clergy File
- inform the Bishop holding the Clergy File (and any Bishops in whose diocese the cleric has PTO) whenever the cleric's PTO has expired and not been renewed or has been withdrawn in that diocese.

*When is it appropriate to grant PTO?*

2.12 Bishops must only grant PTO when they are confident about the cleric's ability to officiate and are happy to recommend him or her to clergy in the diocese. Clergy must be fully confident about using someone who is on the Register with the Bishop's PTO to provide cover on an occasional basis, without the need to carry out further checks.

2.13 PTO must not be granted as of right, however senior or experienced the cleric may be.

2.14 Granting PTO must not be a box ticking exercise and involves more than ensuring that the appropriate safeguarding checks have been carried out.

2.15 PTO must not be granted if the bishop does not consider someone is capable of exercising a ministry.

2.16 Granting PTO does not necessarily imply that clergy are able to take a role of responsibility in a benefice; merely that they are able to officiate and to carry out related duties, for example to preside and preach, provide pastoral support, and take weddings and funerals to an adequate standard. Some clergy with PTO will

have an extensive ministry, but others (particularly later in retirement may only exercise ministry occasionally). PTO is appropriate for both these forms of ministry.

2.17 Sometimes where a cleric with PTO is taking a leadership role (for example helping a parish through a vacancy) it will be more appropriate for the cleric to hold office on a time-limited basis rather than remain on PTO. In these situations, the cleric must undertake safeguarding training on the leadership pathway.

*PTO and clergy with a contract of employment*

2.18 If a cleric is carrying out a ministry subject to an employment contract (for example, as chaplain or Diocesan Director of Ordinands (DDO)), he or she must be given a licence rather than PTO.

2.19 If they are a chaplain, this licence will need to be issued under section 2 of the Extra-Parochial Ministry Measure 1967 (EPMM) so that they do not need to obtain the consent of the relevant incumbent to carry out their ministry. PTO will be required in addition to the EPMM licence.

2.19 If their licence is limited to their place of work but they are going to carry out occasional ministry beyond the workplace, the bishop must give them PTO in addition. Clergy who are carrying out an employed role that does not require a licence (because it is one that does not need an ordained person) also need to be given PTO if they are to be able to exercise a ministry.

*Overseas Permission to Officiate*

2.20 Clergy and bishops of churches in communion with the Church of England, or of churches whose ordination the Church of England accepts, must have permission from the relevant Archbishop (OPTO) before they can be granted PTO to officiate at a Church of England service of any kind in accordance with the Overseas and Other Clergy Measure.

2.21 All diocesan and suffragan bishops must ensure that all clergy who fall under the Overseas and Other Clergy Measure have both a valid up-to-date PTO and OPTO. The duration and expiry date of an OPTO and PTO may differ. An OPTO may, in certain cases, be granted without limitation of time and need not to be linked to the period for which a DBS check is valid.

2.22 Officiating without a valid OPTO is an ecclesiastical offence for the purposes of the CDM.

2.23 The short-term OPTO procedure must be used if a clergy person is visiting from overseas and wishes to robe for a particular service or officiate less than 7 times in 2 weeks (14 days), in any 12-month period. See Appendix 3.

2.24 Where clergy have lived, worked, or volunteered outside the United Kingdom for a continuous period of six months or more at any point within the previous 10 years, additional checks are required in the Safer Recruitment guidance.

*Retired bishops*

2.25 Bishops will need to decide whether they wish retired bishops to exercise an episcopal as well as a priestly ministry in retirement. If they are to exercise an

episcopal role, including participation in ordinations and confirmations, they will need to be given a commission or instrument of delegation from the diocesan bishop.

*Bishops available to provide episcopal ministry under the House of Bishops Declaration on the Ministry of Bishops and Priests*

2.26 Bishops 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 are appointed as Honorary Assistant Bishops. See Appendix 4

### **3. The Process of granting PTO in the same diocese**

3.1 The process to be followed for granting PTO where the cleric already holds an appointment in the diocese is set out below. The elements are largely the same when a cleric is moving to a new diocese and applying for PTO there, although there are additional safeguarding checks including a CCSL. For further details of the process when clergy are applying for PTO in a diocese that is new to them, see Appendix 1.

*Exit Interviews*

3.2 The bishop must ensure that there is an opportunity for an exit interview to take place whenever clergy leave the diocese or retire from office and remain in their own diocese.

*Completing an application form*

3.3 Clergy wishing to apply for PTO must complete an application form and Church of England Confidential Declaration Form.

3.4 The Bishop must provide an application form for this purpose. See the Guidance for an example.

3.5 When applying for PTO, clergy must mention on the application form if they have PTO elsewhere.

3.6 The Bishop must check by consulting the Register whether the clergy has PTO in another diocese and whether this has been recorded on the application form.

*Assessing suitability and safeguarding checks*

3.7 Before granting PTO, it is important to identify any relevant issues. The Bishop may be aware of these anyway, but the Bishop must still check the Clergy File. The Bishop must not give PTO to a cleric unless the Bishop is confident about his or her ability to officiate and is happy to recommend him or her to clergy in the diocese. See Appendix 2 on Individuals who may pose a risk.

3.8 If the Bishop has any concerns – whether about safeguarding or other matters – the Bishop must obtain further information and advice and consult relevant members of the bishop's staff and also the DSO and HR adviser as necessary.

3.9 If the Bishop does not know the applicant sufficiently well (for example when the Bishop is new to the diocese) or considers that there is not enough information in

the Clergy File for the bishop to be confident about issuing PTO, the Bishop must consult the relevant area/rural dean or archdeacon, or if considered necessary, any other person with sufficient knowledge of the cleric's ministry, such as an appropriate lay person in the benefice where the cleric last ministered.

- 3.10 Bishops must not grant PTO to a barred person. PTO must only be granted after a satisfactory enhanced DBS with barred list check certificate has been received and assessed, and must not be granted for a period which exceeds the period for which the DBS check is valid under the current policy i.e. currently 3 years.
- 3.11 Clergy who are applying for PTO in the same diocese where they have ministered are not required to have a new enhanced DBS with barred list check, if their current certificate is valid (i.e. less than 3 years old). If the DBS check period has less than 3 months left to run, then a new application must be submitted in the usual way
- 3.12 PTO must not be granted on condition that required safeguarding training is completed. If safeguarding training is up to date, clergy do not need to redo their training simply because they are moving from holding an office to PTO.
- 3.13 Where the cleric is remaining in the same diocese, the bishop must ensure the Archbishops' List is checked before granting PTO.

#### *Refusing PTO*

- 3.14 PTO must not be refused without good reason. If it is decided not to grant PTO, the bishop must ensure that
  - an explanation for the refusal is provided;
  - the cleric is given an opportunity to put the case for why the PTO should be granted;
  - arrangements for appropriate pastoral care are provided.
- 3.15 The reason for the refusal, withdrawal or non-renewal of PTO must be recorded on the Clergy File.
- 3.16 There is no legal right of appeal against a refusal to grant PTO.
- 3.17 If the bishop is refusing PTO, the bishop must check the Register and the Clergy File to see whether the cleric has an authorised ministry (whether PTO or holding office) in another diocese. If so, the bishop must inform the relevant bishop(s) that PTO has been refused along with the reasons for it.

#### *Restrictions*

- 3.18 PTO must never be restricted by attempting to exclude children and/or vulnerable adults from someone's ministry, as all clergy with PTO need to be able to work with children and/or vulnerable adults.
- 3.19 Any restrictions about the location where the ministry with PTO may be exercised (for example if it is confined to a particular benefice) must
  - be recorded in the bishop's letter of permission and

- made known to the relevant archdeacon, area/rural dean, and clergy and churchwardens of adjacent parish(es) so that they do not ask the cleric with geographically restricted cover to minister outside the area where the cleric has PTO.

*Arrangements for oversight of clergy with PTO*

3.20 The Bishop is responsible for ensuring oversight of the ministry of all clergy with PTO. The Bishop must decide the nature of this oversight. This is usually done by designating someone (usually the cleric's incumbent or priest in charge) as locally responsible.

3.21 Responsibility for the pastoral care of the cleric is initially the responsibility of the local incumbent or priest in charge and, where appropriate, the RCO.

*Role descriptions and statements of agreed expectations*

3.22 Church Officers— which includes clergy with PTO – must have a clear role description which sets out what tasks the person will do. This is required by the Safer Recruitment Guidance.

3.23 A role description for clergy with PTO will take the following form:

- A 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;
- A set of non-binding expectations about the kind of ministry the cleric with PTO will provide, which is agreed between the cleric with PTO and the designated responsible person and reviewed regularly.

3.24 Any agreed statements of expectations are not binding or long-term commitments, but expressions of intention that articulate the ministry that the cleric is currently able to provide. The cleric with PTO and the designated responsible person can each ask for a review and agree a change at any time.

3.25 The agreed statement of expectations is distinct from a safeguarding agreement, which may not be amended by mutual agreement, but the existence of a safeguarding agreement does not necessarily mean that PTO can never be granted.

#### **4. Reviewing and renewing PTO**

4.1 PTO must not be granted for a period which exceeds the period for which the DBS check is valid under the current policy i.e. currently 3 years.

4.2 It must only be renewed after a satisfactory enhanced DBS with barred list check certificate has been received and assessed. If the DBS certificate discloses any information, the bishop must seek advice from the DSO and the diocesan registrar.

4.3 The diocesan bishop must ensure that clergy are clear that they will not be able to minister beyond the period for which their DBS check is valid.

4.4 The DBS renewal process will need to start in good time before the term of the PTO expires. Clergy must be informed that their PTO will be withdrawn if the DBS check is not satisfactorily renewed.

- 4.5 PTO must always be reviewed before being renewed and in the light of changing circumstances. The Bishop may delegate this review to the Designated Responsible Person.
- 4.6 Clergy wishing to renew their PTO must complete a renewal form provided by the bishop.

## 5. Not renewing PTO

- 5.1 The Bishop must not decline to renew PTO without good reason. Reaching a certain age is not in itself a sufficient reason for not renewing PTO.
- 5.2 Before deciding not to renew the PTO, the Bishop must have consulted the Designated Responsible Person or whoever has direct and local responsibility for the cleric's ministry.
- 5.3 If it is decided not to renew PTO, the bishop must ensure that
  - explanation for the refusal is provided;
  - the cleric is given an opportunity to put the case for why the PTO should be renewed;
  - arrangements for appropriate pastoral care are provided.
- 5.4 The reason for the non-renewal of PTO must be recorded in the Clergy File.
- 5.5 Bishops must ensure that they have updated their records on the People System with any non-renewals of PTO so that the Register is updated.
- 5.6 If the Bishop is not renewing the PTO, the Bishop must check the Register and the Clergy File to see whether the cleric has an authorised ministry (whether PTO or holding office) in another diocese. If so, the Bishop must inform the relevant bishop(s) that PTO has been refused, withdrawn or not renewed, along with the reasons for it.
- 5.7 PTO may be renewed again if the circumstances that led to its not being renewed change.

## 6. Withdrawing PTO

- 6.1 The Bishop must not withdraw PTO without good reason. In many cases, PTO will be withdrawn on the recommendation of the Designated Responsible Person, but not always: for example, it must be withdrawn following a complaint or safeguarding allegation that would result in the suspension of someone who was an office holder.
- 6.2 If PTO is withdrawn, the bishop must ensure that
  - an explanation for the refusal is provided;
  - the Designated Responsible Person or whoever has direct and local responsibility for the cleric's ministry has been informed;
  - the cleric is given an opportunity to put the case for why the PTO should not be withdrawn;
  - arrangements for appropriate pastoral care are provided.
- 6.3 The CDM applies to all clergy, however their ministry is authorised, and continues to apply even when they are no longer active in their ministry. PTO must be

withdrawn, not suspended, whilst investigations are carried out into any allegations (whether safeguarding-related or not) made against a cleric with PTO if those allegations would result in a clergy office holder being suspended under the CDM.

- 6.4 In circumstances where an office holder would not be suspended under the CDM, there is no need to withdraw the PTO.
- 6.5 The Register must be updated immediately when someone's PTO is withdrawn or expires.
- 6.6 When PTO is withdrawn, the bishop must check the Register and the Clergy File to see whether the cleric has an authorised ministry (whether PTO or holding office) in another diocese. If so, the bishop must inform the relevant bishop(s) that PTO has been withdrawn, along with the reasons for it.

## 7. Safeguarding training

- 7.1 Any cleric granted PTO must have completed either a bespoke PTO Safeguarding Learning Pathway or Leadership training within the past 3 years.
- 7.2 Where someone with PTO plays a lead role in shaping the culture of the Church body concerned or exercises a role with particular responsibility, they must complete the core Safeguarding Leadership Pathway.
- 7.3 The Bishop is responsible for deciding which Safeguarding Learning Pathway a cleric with PTO must take.
- 7.4 PTO must not be granted on condition that safeguarding training is completed. PTO must only be issued once safeguarding training has been completed.

## Approval and review

|               |                  |
|---------------|------------------|
| Approved by   | House of Bishops |
| Policy owner  | House of Bishops |
| Policy author | Patrick Shorrock |
| Date          | September 2025   |
| Review date   | February 2026    |

## Revision history

| Version no. | Revision date | Previous revision date | Summary of changes |
|-------------|---------------|------------------------|--------------------|
|             |               |                        |                    |

|     |      |      |  |
|-----|------|------|--|
| 1.0 | 2018 |      | First version  |
| 2.0 | 2025 | 2018 | Policy shortened; new guidance added, new appendices added |
|     |      |      |  |
|     |      |      |  |

## APPENDIX 1 Granting PTO to someone from another diocese

### *Completing an application form*

1. Clergy wishing to apply for PTO in a new diocese must complete an application form and Church of England Confidential Declaration Form and send it to the receiving bishop.
2. When applying for PTO, clergy must mention on the application form if they have PTO elsewhere.
3. The Bishop must ensure that the Register is checked to ascertain whether the cleric has PTO in another diocese and whether this has been recorded on the application form.
4. PTO must only be granted subject to an enhanced DBS with barred list check.
5. Where clergy have lived, worked, or volunteered outside the United Kingdom for a continuous period of six months or more at any point within the previous 10 years, additional checks apply. These are outlined in Section 9 of the Safer Recruitment Guidance.

### *Clergy Current Status Letter*

6. The receiving Bishop must request a satisfactory CCSL from the sending Bishop before PTO is granted.
7. The sending Bishop must follow the House of Bishops Guidance for completing references and CCSLs.

### *Assessing the suitability of applicant for PTO*

8. The receiving Bishop then assesses the suitability of the cleric on the basis of the CCSL and an interview with either the Bishop or a member of the senior team.
9. If the receiving Bishop does not consider the CCSL is sufficiently detailed to be confident about issuing PTO, the Bishop must consult the sending bishop to seek further information.
10. The receiving Bishop must arrange for the cleric applying for PTO to have an interview. This will provide an opportunity to discuss similar issues to those in the exit interview:
  - future plans for ministry
  - any particular skills or experience that could support the mission of the receiving diocese;
  - the safeguarding training that the cleric will be required to undertake.
11. The Bishop must obtain feedback from the priest of the parishes or benefice where the cleric has moved or wishes to exercise their PTO. This can be done by using the form at Appendix 4 of the guidance, which includes a place for the incumbent to commend the application and provide feedback. Alternatively, the Bishop can consult the incumbent directly
- .

12. The Bishop of the receiving diocese must ensure that the Archbishops' List is checked.

*Induction*

13. After PTO has been approved but before it is issued, clergy must have an induction.

This will include an introduction to diocesan safeguarding policies and procedures even if their safeguarding training is up to date. Their safeguarding training needs must be reviewed, in order to establish whether their transferable training is up to date. If the transferable training is not up to date, this must be completed before PTO is granted. This will mean that diocesan induction will only be provided to those approved for a PTO, but it will need to be undertaken by successful applicants before the PTO itself is granted.

*Issuing PTO*

14. PTO must not be issued until satisfactory completion of interview and induction.

15. If PTO is refused, the same considerations apply as when a cleric applies for PTO in their own diocese.

16. The same arrangements for oversight, role descriptions and statements of agreed expectations will apply to all clergy with PTO whether they have remained in their current diocese or moved to another diocese.

*Review of Clergy File*

17. The Clergy File should move to the new diocese at the point of the cleric being granted PTO in that diocese, unless the cleric is retaining PTO or a Bishop's licence in their current/most recent diocese and expecting that the greater part of his or her ministry will be in that diocese. If the cleric holds a licence or PTO concurrently in more than one diocese, there should be only one Clergy File, which should be held in the diocese where the greater part of his or her ministry is exercised, and a file note made that the PTO is held in another diocese.(in accordance with the Clergy File Policy).

18. The Chaplain or a member of the bishop's staff and the DSO should review the cleric's Clergy File once received and make reasonable enquiry with the sending Bishop to seek assurances regarding any concerns raised by the review.

## APPENDIX 2: Individuals who may pose a risk

1. The existence of a criminal record will not necessarily prevent a person from being granted PTO.
2. The existence of a safeguarding agreement will not necessarily prevent a person from being granted PTO.
3. Advice must be sought from both the DSO and the diocesan registrar when considering whether to refuse or withdraw PTO if there have been substantiated concerns or allegations in relation to child or adult abuse, for example when
  - there has been a finding of criminal guilt or acceptance of a caution;
  - the cleric has been the subject of a criminal investigation for offences relating to children and/or vulnerable adults that did not result in a conviction;
  - there has been a finding of fact as part of civil proceedings, or an unequivocal admission in the context of a civil settlement;
  - allegations have been found proven in disciplinary proceedings, for example under the Clergy Discipline Measure 2003 (or its predecessors);
  - a cleric has been prohibited and/or barred from work with children and/or vulnerable adults;
  - a family court has made a finding of fact that a cleric has caused significant harm to a child and/or vulnerable adult, or when a cleric has had any such court make an order against them on the basis of any finding or allegation that any child and/or vulnerable adult was at risk of significant harm;
  - there had been a statutory and/or church investigation, including a risk assessment, in line with the Guidance on Responding Well to Victims and Survivors of Abuse, that evidenced that safeguarding concerns had been substantiated and there was an ongoing risk to children or adults.

## APPENDIX 3 Overseas applications for PTO

Initial enquiries should be made to the office of the diocesan bishop of the diocese in which the applicant wishes to officiate. The diocesan bishop's office will request that the applicant complete a form which is then signed by the diocesan bishop confirming that they are content to grant diocesan permission to officiate to that person ("PTO").

Note that there is a different form for the [Province of York](#) and the [Province of Canterbury](#).

The following documents are required for an OPTO application to be successful.

- Proof of ordination as a bishop (if applicable), priest, (and/or) deacon. This proof usually takes the form of copies of the applicant's "letters of orders". If these are lost, the applicant should contact the bishop who ordained the applicant and request that they send an email with a photograph of the entry in the bishop's register to the office of the diocesan bishop (in the Church of England) or a screenshot of the electronic spreadsheet of the ordaining bishop's register: evidencing the date, and place of ordination. If this cannot be found, advice from the Provincial Registrar should be sought.
- Proof of legal right to remain in the country
- Proof of having complied with the Church of England's safeguarding training requirements
- Proof of a positive recommendation from a Candidates' Panel in the case of an applicant from another Church
- Proof that the diocesan bishop is content to allow the applicant to officiate in his / her diocese and grant PTO (diocesan permission to officiate) and
- A completed application form signed by both the diocesan bishop and the applicant.

A member of staff in the diocesan bishop's office will then contact the relevant Provincial Registry who must review the application before sending it to the relevant Archbishop for approval.

- [Canterbury OPTO requests](#) and enquiries must be sent to [OPTO@churchofengland.org](mailto:OPTO@churchofengland.org) with all the applicant's supporting documentation attached (preferably in PDF format).
- [York OPTO requests](#) and enquiries must be sent to the [York Provincial Registry](#).

### **Short term OPTO for overseas clergy making short visits to English dioceses**

In the exercise of their powers under section 1A of the Overseas and Other Clergy (Ministry and Ordination) Measure 1967, the archbishops have granted a general permission to overseas clergy to officiate as priest or deacon in their respective provinces for a single period of not more than 14 days within any 12 months, provided that the priest or deacon has obtained permission from the bishop of the diocese where he or she is to officiate.

This is intended to cover visits by overseas clergy to carry out a single engagement, or a small number of one-off engagements, that all take place within no more than a two-week period. Examples of what is covered by the new arrangements include preaching and other participation in services by overseas clergy from a link diocese on a visit; overseas clergy attending and robing at an ordination or consecration; or preaching by invitation for a particular occasion. It is not intended to cover situations where overseas clergy are carrying out duties unaccompanied, or in place of the minister with cure of souls (including the publication of banns and the solemnization of marriages); it does not therefore extend to the provision of holiday or sickness cover by overseas clergy (for which individual applications for OPTO are still required).

Where the general permission applies, no application needs to be made to the archbishop. The only individual permission that needs to be granted is written permission to officiate from the bishop of the relevant diocese. Such written permission is outside the scope of the House of Bishops' policy on the grant of permission to officiate (PTO), as that policy is concerned with the grant of PTO on an ongoing, renewable basis. As granting permission to officiate on this basis does not amount to 'recruitment', the statutory guidance on safer recruitment and granting PTO is not applicable.

The National Safeguarding Team have therefore advised that before granting a diocesan permission to officiate under these arrangements, the Bishop must:

- obtain a letter of good standing (in the standard form available from the provincial registrar) from the bishop of the diocese where the overseas priest or deacon is currently serving;
- ensure that the overseas priest or deacon either:
  - completes the Church of England basic safeguarding training (a 90-minute online course which is valid for three years), in which case the PTO need not contain any restrictions; or
  - is accompanied at all times by an individual who is included on the National Register of Clergy, in which case the PTO must list the specific dates when and places at which the overseas priest or deacon may officiate (different individuals may accompany the overseas cleric during the course of the visit provided that their names are listed in the PTO alongside the occasion on which each individual will accompany the overseas cleric); and
- send a copy of the diocesan PTO to the Provincial Registrar within 14 days of its being granted and in any event before the overseas priest or deacon is due to officiate for the first time.

## APPENDIX 4 The appointment of Honorary Assistant Bishops

There is no ecclesiastical office of “assistant bishop” or “honorary assistant bishop”, but the terms are widely understood to refer to persons in episcopal orders who have been given permission from a diocesan bishop to undertake ministry in that diocese and, when called upon to do so, to exercise episcopal functions on behalf of the diocesan bishop.

A diocesan or suffragan bishop’s ministry is authorised by their Letters Patent in accordance with the Appointment of Bishops Act 1533. The Canons of the Church of England then set out aspects of their roles and authority.

However, when a bishop ceases to hold the office of diocesan or suffragan bishop, the authority to exercise their episcopal orders comes to an end. Inherent in the exercise of their episcopal orders is the authority to exercise a priestly ministry also.

### Authority to minister

Therefore, when a bishop retires or resigns their office, they must obtain authority to minister under Canon C8, on the same terms as other clergy in the Church of England. That authority can be given by appointment to another ecclesiastical office (for example, as a cathedral dean, incumbent of a benefice or assistant curate in a benefice), by receiving a licence to officiate within a diocese or by receiving a written permission to officiate. They will then be in a position to exercise priestly ministry.

That does not, however, permit the person to exercise an episcopal ministry. The person is not then able to exercise episcopal ministry in their own right, as they no longer hold an episcopal office. They can only do so by acting on behalf of a serving diocesan bishop.

### Episcopal Commission

Canon C18.3 provides that the bishop of a diocese may fulfil his or her duties by appointing a commissary to act on their behalf. If that commissary is in episcopal orders, the diocesan bishop can then request them to undertake certain episcopal functions on their behalf (for example, confirmations or consecration of churchyards).

There are other statutory functions which a diocesan bishop may only delegate in accordance with the relevant statutory provisions. For example, the consideration and determination of matters under the Clergy Discipline Measure 2003. In that case, the diocesan bishop must delegate that specific function to the commissary bishop by written instrument, having obtained the approval of the diocesan synod or bishop’s council in accordance with section 13 of the Dioceses, Pastoral and Mission Measure 2007.

When a person in episcopal orders ceases to hold office as a diocesan or suffragan bishop (whether by resignation or compulsory retirement) he or she must, therefore, obtain authority to minister from a diocesan bishop. In most cases, this will be by way of written permission to officiate. If a diocesan bishop wishes to appoint the person as an ‘assistant bishop’ or an ‘honorary assistant bishop’ in their diocese so that certain episcopal functions can be delegated to them there should also be a commission or appointment instrument under Canon C18.

It would be possible for both these authorisations to be comprised in the same document, but it is important that, in granting permission to officiate and authority to exercise priestly ministry, the House of Bishops’ policy is followed in the same way as for other clergy. The

normal processes for safer recruitment, training and CCSL must be adhered to. The only additional requirement is the commission.

There is no standard form for that commission, although the provincial registrars can be contacted for guidance as to the content and suggested precedents. However, it is essential that any person appointed as an assistant bishop or honorary assistant bishop is authorised by way of authority to exercise priestly ministry in accordance with the House of Bishops' policy as well as the commission for episcopal functions. This has not always been the case thus far and so it is important that diocesan bishops ensure a regular pattern of review for these arrangements. It is recommended that assistant bishops are included in training and regular updates as part of normal diocesan structures.

It should be understood and made clear that that person is not free to exercise episcopal ministry of their own accord. They do so only when exercising episcopal functions specifically requested and delegated by a diocesan bishop.

Where a serving suffragan or diocesan bishop wishes or is requested to exercise regular episcopal functions in another diocese it will be necessary to follow the same protocols. This is the case for those bishops providing episcopal ministry in several dioceses under the House of Bishops' Declaration on the Ministry of Bishops and Priests, in particular the Bishops of Ebbsfleet, Oswestry, Richborough, Beverley and, for the dioceses of London and Southwark, the Bishop of Fulham. It is, therefore, possible for any bishop to hold several of these commissions for several dioceses at once.

The Provincial Registrars of Canterbury and York

May 2025