

Permission to Officiate Process for Retired Clergy

The purpose of this process is to ensure a clear procedure prior to any Permission to Officiate (PtO) requests being authorised or renewed by the Bishop. This process will ensure that all the safeguarding requirements are met and that all interested parties are aware of their role in the process and the tasks for which they are responsible. There are three parts to this process: New Applications, Renewals and Oversight of Clergy with PtO.

This process is written in line with the House of Bishops' Policy on Granting Permission to Officiate (approved July 2018) and is carried out in accordance with the House of Bishops' Safer Recruitment: Practice Guidance. The requirements of this policy will be implemented for all new applications or, for existing holders, the time of the PtO's next renewal.

[Nb. Prior to seeking Permission to Officiate, clergy retiring within the Diocese will have read the 'Policy and Procedure for Clergy Approaching the Age of 70' process and under the "Ecclesiastical Offices (Terms of Service) (Amendment) Regulations 2017" may have had an extension to the existing licence before applying for PtO.]

New Applications (see Appendix 1)

1) Stage 1 – Application

An initial expression of interest in obtaining PtO will have come to the Bishop's office from the applicant or an incumbent or Area Dean and an application pack will have been sent out to the applicant (including safeguarding induction information¹).

- I. A formal request for Permission to Officiate will be made to the Bishop, using the application form sent out in the pack.
- II. The Bishop's Secretary will add the applicant's details to the CMS as "Application Pending". (If a Designated Person (see below) has been agreed at this stage, the Bishop's Secretary will log this on CMS under "PtO Designated Person".)²
- III. If the person applying for PtO is retired but not previously listed on CMS, a CMS activity referral will be made to BORCAS for their action.

2) Stage 2 - Checking

A - References

- I. If the person applying for PtO is from **outside** the Diocese:
 - a) a request for an Episcopal Reference and Clergy Current Status Letter, (ERCCSL), will be sent from the Bishop's Secretary to the Diocese in which the applicant last served.³
 - b) If the Bishop does not consider the episcopal reference to be sufficiently detailed to be confident about issuing PtO he should obtain further references.⁴
 - c) The Archbishop's List will be checked by the Bishop's PA.
 - d) Any safeguarding concerns revealed will be passed to the Diocesan Safeguarding Adviser (DSA).
 - e) If the sending Bishop does not know the applicant sufficiently well, or considers that there is not enough information on the Blue file, for the Bishop to be confident about recommending PtO, then references should be obtained from the Area Dean and a lay person in the parish where the cleric last ministered.⁵

¹ House of Bishops Policy – 4.17

² House of Bishops Policy – 4.4

³ House of Bishops Policy – 4.13

⁴ House of Bishops Policy – 4.13

⁵ House of Bishops Policy - 4.14

II. If the person applying for PtO is from **within** the Diocese:

- a) the Blue File and DSA are consulted.⁶
- b) If the Bishop does not know the applicant sufficiently well, or considers that there is not enough information on the Blue file, for the Bishop to be confident about issuing PtO, then references should be obtained from the Area Dean and a lay person in the parish where the cleric last ministered.⁷

III. The relevant Area Dean (the one in whose deanery the applicant will either live or have most of his/her ministry) will be advised of the formal request for PtO by email from Bishop's House.

B - Introduction to Bishop

- I. If the person applying for PtO is from outside the Diocese, unless well known to the Bishop, then arrangements will be made for him/her to meet the Bishop or a member of his staff for an entry interview⁸.
- II. In exceptional circumstances the Bishop will decide on a suitable geographical area and if any restrictions are appropriate⁹.

C - Safeguarding Checks

DBS Check

- I. The Bishop's Secretary will email the Safeguarding Assistant to advise that the applicant needs to be processed for safeguarding.
- II. The Safeguarding Assistant will arrange for a DBS check to be completed (unless the applicant already has a valid check in the Coventry Diocese¹⁰), by means of emailing the online DBS Application Process form to the nominated candidate for completion; this should include an allocated User ID. The APCS link is www.onlinecrbcheck.co.uk and they should follow the instructions. (Portability for DBS checks does not apply and therefore a DBS check for the Coventry Diocese must be completed unless the person is signed up with the update service.) The applicant will also be sent a Confidential Declaration Form¹¹.
- III. On receipt of an email from APCS confirming the DBS application has been completed, the Safeguarding Assistant will verify the ID of the candidate onto the online DBS system.
- IV. Once the Safeguarding Assistant has received confirmation from APCS that the DBS is clear the DBS details will be logged on CMS. If blemished, a risk assessment will be undertaken by the Diocesan Safeguarding Adviser or Assistants DSA's and they will advise the Bishop's Secretary of any delays.

Safeguarding training

- V. The Safeguarding Assistant will arrange for the appropriate safeguarding training to be completed (or arrange an exemption in rare cases) for any applicant who does not have up to date training (training is portable and a refresher is not required provided training is up to date)¹². If the cleric does not have up to date training they must undertake it before PtO is granted. On receipt of a CCSL or other evidence of training already completed, the Bishop's Secretary will confirm to the Safeguarding Assistant the training they have completed. If the training has been completed in another Diocese, the DSA will decide if the training they have undertaken is acceptable or if refresher training is required and arrange for this if necessary.
- VI. On completion of training or advice as above, the Safeguarding Assistant updates the CMS with the training date and date of expiry.

⁶ House of Bishops Policy – 4.6

⁷ House of Bishops Policy – 4.6

⁸ House of Bishops Policy – 4.16

⁹ House of Bishops Policy – 4.29-4.31

¹⁰ House of Bishops Policy – 4.7

¹¹ House of Bishops Policy – 4.8 and 4.12

¹² House of Bishops Policy – 5.4

Clearance for Safeguarding

VII. Once the safeguarding checks are complete, the Safeguarding Assistant will advise the Bishop's Secretary that the applicant is clear for the PtO process to continue by creating an activity on CMS.

3) Stage 3 – Documentation

- I. If the applicant does not have a Designated Person, the Bishop's Secretary will advise the Archdeacon Pastor in order for this to be organised. Once arranged, the Archdeacon Pastor advises the Bishop's Secretary who will log this on CMS under "PtO Designated Person"¹³.
- II. The applicant will meet with the Designated Person to discuss agreed expectations of their ministry which will be documented on the appropriate form (Appendix 2) which will be sent to the Archdeacon Pastor, who will share the information with the Area Dean and Bishop's Secretary (to be placed in the Blue File). (This may have been accomplished at an earlier stage.)¹⁴
- III. If the cleric lives outside the Diocese and has PtO in another Diocese, they may have a Designated Person in their own Diocese, but their Statement of Agreed Expectations must be submitted to the Archdeacon Pastor for ratification and counter signature. In these cases the Archdeacon Pastor is their Designated Person for this Diocese.
- IV. If the applicant is new to the Diocese, the Bishop's Secretary will inform the Ministerial Development Administrator who will send an induction pack with information about the Diocese¹⁵.
- V. A PtO document including a ministerial and safeguarding record will be prepared by the Bishop's Secretary.

4) Stage 4 - Authorisation

- I. The Bishop will give Permission to Officiate by signing the 'PtO document' which will confirm that PtO is granted for a fixed term period that aligns with DBS renewal period and is no longer than 5 years¹⁶; and on condition that safeguarding training is renewed every three years¹⁷.

5) Stage 5 - Issuing

- I. The Bishop's Secretary will issue the PtO with a covering letter confirming the details above. This will be copied to the Archdeacon Pastor, Diocesan Safeguarding Team, Bishop's PA, all Area Deans, the Designated Person and the HR Administrator so that the information can be included on the Movement of Clergy Form (this should include any signals indicating geographical restrictions). For any clergy holding licence or PtO in another Diocese, this letter will be copied to the Bishop of that Diocese.

6) Stage 6 – Recording

- I. The Bishop's Secretary will update the CMS with the start and end dates and make a note in the Geographical restrictions field if the PtO does not cover the whole Diocese. A note of any restrictions to the PtO will be kept on the blue personal file.
- II. The Blue file will be requested for transfer, where appropriate¹⁸. When a file is received, the Diocesan Safeguarding Adviser will be notified by Bishop's House, by email, and will arrange to review the file¹⁹.
- III. The Safeguarding team will keep a training record and ensure training is undertaken/renewed as required.

¹³ House of Bishops Policy – 4.32-4.35

¹⁴ House of Bishops Policy – 4.34

¹⁵ House of Bishops Policy – 4.17

¹⁶ House of Bishops Policy – 4.36-4.37

¹⁷ House of Bishops Policy – 5.3

¹⁸ *Where a cleric holds a licence or PtO concurrently in more than one diocese, the blue file should be held in the diocese where the cleric exercises the greater part of his or her ministry. A note should be kept on the file as to which other dioceses have issued a licence or PtO 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. [paragraph 76: Personal Files Relating to Clergy: guidance for Bishops and their staff: HoB, 13th March 2013.*

¹⁹ House of Bishops Policy – 4.15

Renewals²⁰

- 1) Four months prior to PtO expiring, the Bishop's Secretary will write advising the holder that PtO is due to expire and that he or she should contact his or her Designated Person to arrange for a PtO review. The letter will emphasize the need for the review in order to avoid expiry of the PtO. The review will take place in line with "Oversight of Clergy with PtO", (see below), and the result of the review will be sent to the Bishop, with a request for renewal if appropriate.
- 2) The Bishop will review the request (taking into consideration the Designated Person's report). If a renewal is required and agreed, the Bishop's Secretary will:
 - Check that the DBS is up to date on CMS²¹
 - Check that the PtO holder has attended the required Safeguarding Training
 - Email the DSA to request confirmation that there are no safeguarding issues or concerns
- 3) If all the above requirements are met, the Bishop's Secretary will produce a new PtO document and the Bishop will write to the person confirming that PtO is renewed, for a period which extends no further than the expiry of the DBS clearance, and explaining that Safeguarding Training must be undertaken as required. The letter will be copied to the Archdeacon Pastor, Diocesan Safeguarding Team, Bishop's PA, Designated Person, all Area Deans and the HR Administrator, so that the renewal can be included on the Movement of Clergy Form. The Bishop's Secretary will update CMS. For any clergy holding licence or PtO in another Diocese, this letter will be copied to the Bishop of that Diocese.
- 4) If nothing is heard from a PtO holder following the reminder letter, PtO will cease on expiry and a full new application will be required if PtO is requested again in the future. The Bishop's Secretary will inform the Archdeacon Pastor and HR Administrator so that it can be included on the Movement of Clergy Form, in either case.

Oversight of Clergy with PtO

- 1) All PtO clergy will be required to meet with their Designated Person on an annual basis to review and revise their agreement and this agreement together with a Ministerial Return (Appendix 3) will be sent to the Archdeacon Pastor²². (This should be placed on the Blue File).
- 2) The Designated Person will ensure:
 - PtO clergy receive appropriate pastoral support, and are not asked to do more than they are willing or able to provide;
 - appropriate use is made of their gifts and experience;
 - their ministry is properly acknowledged and affirmed and supported.
- 3) During the annual review, care should be taken to ensure that elderly or infirm clergy should be given PtO for a period which is suitable to their circumstances. It may be that a reduced length of PtO period should be recommended, especially to those over the age of 80, where typically a yearly PtO may be a better option. It is worth bearing in mind that PtO may actually need to be withdrawn, before the term is up in cases where harm to self or others could be caused simply because of a lack of faculty or physical ability dictates, and this should be advised to the Bishop who will endeavour to deal with this situation in the most appropriate way.

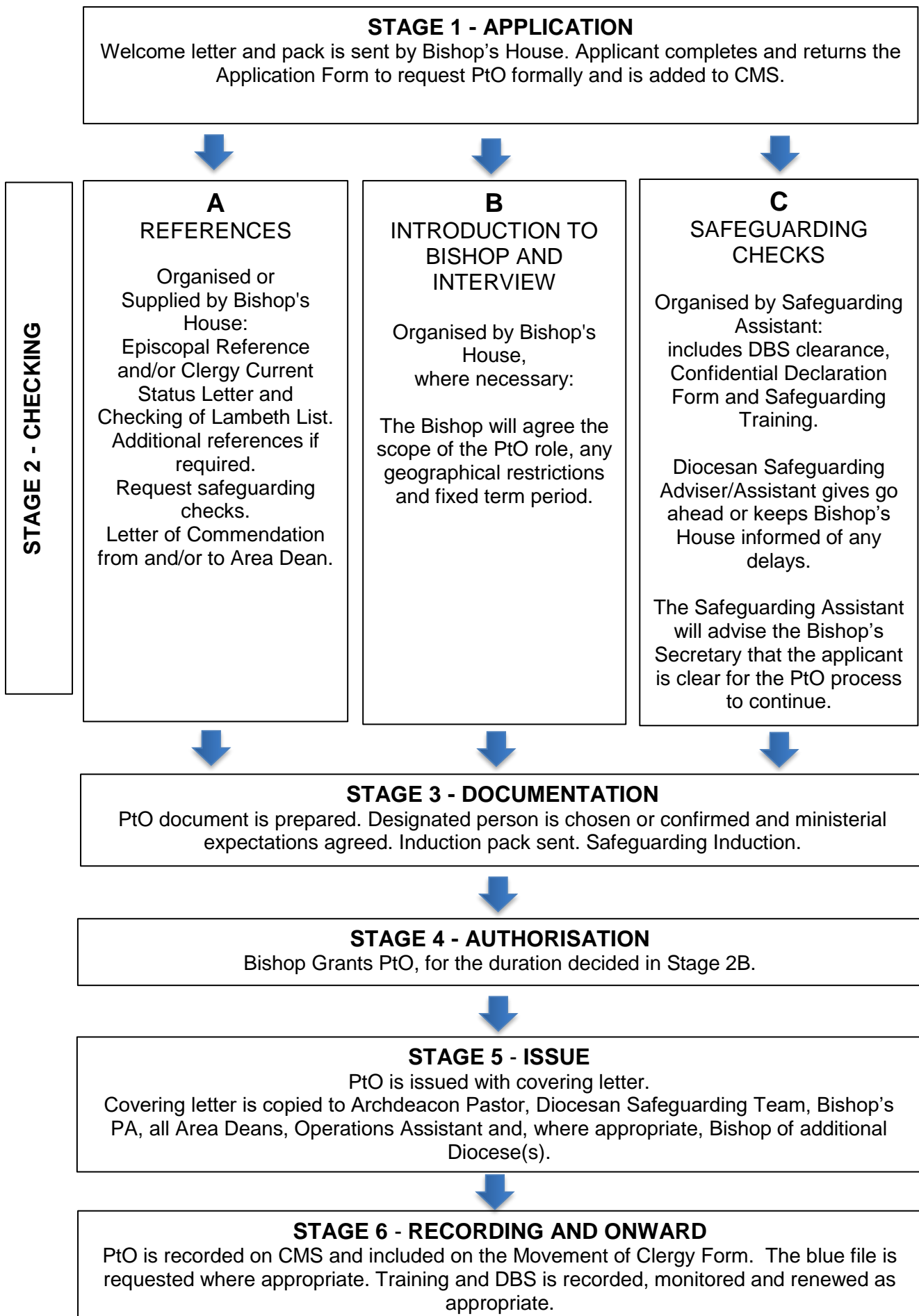
Archdeacon Pastor and Diocesan Safeguarding Adviser

30 April 2020

²⁰ House of Bishops Policy – 8.1-8.7

²¹ House of Bishops Policy – 4.38

²² House of Bishops Policy – 7.1-7.6



Permission to Officiate - Statement of Agreed Expectations- Help Sheet

The House of Bishops' Policy on the granting of Permission to Officiate states that all clergy should meet with a designated person to discuss and agree expectations. The conversation should be guided by the headings in the box below to allow the formulation of an agreed statement, which should be signed and dated by both the clergy person with PtO and the designated responsible person. This sheet is not a form to fill, but rather a guide for your conversation. The agreement made following the discussion should be recorded in some way and a copy of the record sent to the Archdeacon Pastor.

The agreement is not binding, may be changed at any time, and should be reviewed regularly, at least annually.

In your record of the discussion, please include:

- Name of Deanery, Base Parish and Cleric and Designated Person
- Extent and Nature of Assistance to be provided by the Cleric (see below for prompts)
- Signature of PtO holder and Designated Person, with date of agreement and intended date of review.

Sample wording for document:

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/benefice of [Name of Parish/Benefice] we have agreed the following:

Prompts for discussion

Ministry Support

- Number of days/hours each week across the parish(es) and churches
- To minister alongside and in support of the incumbent/priest in charge, as set out below
- While there is no requirement to attend PCC meetings, clergy with PtO can be co-opted onto PCCs (Church Representation Rules 14 (h)).

Sunday Services

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

Midweek Services

- frequency agreed for midweek services

Occasional Offices

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

Expenses

- Ministry Support – Mileage, Telephone usage, Postage, Sundry Administration, in agreement with the Churchwardens
- Sunday and Midweek Services – number of services offered as a gift, mileage
- The Occasional Offices– availability for weddings or funerals without a fee (see above), availability for additional ministry within the parish/benefice for which a fee should be offered, mileage

Pastoral Care

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

Other Areas of Ministry

- Ministry to the wider church (eg committees, spiritual direction)
- Areas of special interest
- Help/support/advice/training that could be offered
- Areas of ministry to develop or explore
- Availability or willingness to offer “additional ministry” in other parishes for which a fee will be offered if eligible under the Diocesan fees policy.

Appendix 3

Permission to Officiate - Ministerial Return

Name:

Address:

Deanery:

Parish:

Designated person responsible for oversight:

PtO expires on: _____

DBS clearance last carried out on: _____ DBS valid until: _____

Participation in safeguarding training: _____ Further safeguarding training due on: _____

Ministry Carried out for the period from: _____ to: _____

If your ministry is primarily parochial, please list below the approximate number of occasions during the year when you have:

	In my own parish	Other parishes
Presided at the Eucharist		
Preached		
Taken Funerals		
Taken Baptisms		
Taken Weddings		
Provided teaching (Bible Study, confirmation preparation, discussion groups)		
Carried out visits and provided pastoral support		
Other (please specify)		
Other (please specify)		

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 / Area Dean:

I have also provided support for the diocese in the following ways during the year:

I held a discussion of my ministry with _____ on _____ and

[no change was made to the agreed expectations of ministry]

or

[agreed expectations of the ministry I am to carry out were changed and a copy is attached.]

(signed) _____ Date _____

(signed) _____ Date _____
Designated responsible person