



THE CHURCH
OF ENGLAND

Diocese of Chester

SSOMs Moving to PTO: A Good Practice Guide

January 2024

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Please note:

The information provided in this brief guide, is to enable those SSOMs who are approaching the age of 70 to consider the implications of moving from a 'licence' to Permission to Officiate (PTO). Likewise, this guidance should also be noted by Incumbents, Churchwardens, and PCC members who minister with and alongside SSOMs.

It is important to note that the information, advice, and guidance provided herein does not replace or supersede any existing diocesan policy pertaining to the issue of PTO and/or any other HR policies or practice.

Finally, **this guidance should be read in conjunction with the 'SSOM Handbook'**, that can be accessed on the SSOM page of the diocesan website.

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Introduction

As a Diocese we are extremely grateful and indebted to all our SSOMs for the rich ministry they offer and the multifarious ways in which they serve the Church and build the Kingdom of God.

SSOMs – like all clergy – whether licenced or in receipt of PTO, are called, chosen, and dearly loved by God.

It is however National Church policy that those who minister under licence, whether they are stipendiary or self-supporting, should ‘retire’ from licensed ministry at the age of 70 years.

For some, this process can be painful, whereas for others, it can be most welcome, ‘freeing’ them from parochial commitments! It is for that reason, as an SSOM approaches the age of 70, they need to discern whether they ‘fully’ retire from licensed ministry or apply for Permission to Officiate (PTO). Whatever decision is reached, there are far-reaching implications for both the SSOM and the parish.

Careful thought also needs to be given as to how this ‘transition’ is managed.

This ‘*Good Practice Guide*’ is therefore offered in the hope of providing some further information to assist those SSOMs (and their parishes) who are approaching the age at which they may move to PTO.

As ever, the Bishop’s Adviser for Self-Supporting Ordained Ministry and other colleagues at Church House and all the Bishop’s Staff in the Diocese – Bishops and Archdeacons – are available to support any SSOM going through this process.

Likewise, the **Bishop’s Ministry Administrator** is available to answer any questions or queries regarding DBS renewal and the PTO process.

1. Approaching the age of 70

Retiring from active ministry or applying for Permission to Officiate (PTO) at the age of 70, can be a painful process and can feel, to some, like a bereavement. For others, this change in 'ministerial status' is welcomed and actively embraced.

It is for that reason, prayerful thought and consideration needs to be given by the SSOM, as to what ministry might 'look like' for them, post-70.

To help the SSOM in this process, they should arrange in the first instance to meet with the Bishop's Adviser for Self-Supporting Ordained Ministry and/or the Bishop's Adviser for Curate Development and Clergy Transitions **at around the age of 65 years**. Meeting this early on in the process gives the SSOM time to explore the range of options that might be open to them post-70, as well as to give adequate time to pray, discuss and reflect upon what future ministry might 'look like'.

As stated above, when an SSOM reaches the age of 70, they cease to hold a licence. Essentially, there are two main choices open to SSOMs at the age of 70 –

- a. To 'fully' retire from formal, active, licenced ministry, or
- b. To apply for Permission to Officiate (PTO)

If the SSOM decides to seek PTO, there are a whole host of other options open to them, in terms of what ministry might look like moving forward (see below).

A note on vocabulary – in one sense, no-one ever 'retires' from ordained ministry. Therefore, in this *Guide*, 'retirement' / 'retire' will refer to those SSOMs who at the age of 70 years, cease to exercise active ministry on behalf of the Church of England. Those who continue in ministry past the age of 70 years and who therefore apply for Permission to Officiate (PTO), will be referred to as 'those in receipt of PTO' / 'PTO holders' etc.

If the SSOM wishes to seek Permission to Officiate (PTO), this 'permission' is granted by the Diocesan Bishop, via an application made via the Bishop's Ministry Administrator. **This will only happen after the SSOM has first had a conversation with a Suffragan Bishop.** See below for further information.

Without PTO, clergy, whether stipendiary or SSOM, cannot carry out ministry on behalf of the Church of England. Often, those retiring will be required to take a three - six month 'break', but this is at the Bishop's discretion, who may decide, in consultation and agreement with the SSOM, that no 'break' is necessary.

As with stipendiary clergy, the retirement age for SSOMs is 70, as per the *Ecclesiastical Offices Measure 1975*.

However, a fixed term licence can be granted thereafter, but only in rare and exceptional circumstances. Where a fixed term 'extension' to licence is granted, this is done in line with *Common Tenure*, under the *Ecclesiastical Codes of Service Regulations 2017*. For this to happen, certain 'criteria' or conditions must first be met, including an Occupational Health assessment.

Upon retirement or the issue of PTO, the 'status' of 'SSOM' ceases, and the ordained minister with PTO 'officially' falls under the pastoral care and supervision (remit) of the Diocesan PTO (Retirement) Officer(s). Additionally, they will have a 'designated responsible person', who is usually their Incumbent / Priest-in-Charge, or their Rural Dean, to whom they are accountable.

However, many clergy in receipt of PTO, who were licensed SSOMs, wish to remain a part of the Diocesan SSOM structures and network and maintain a close link with the Bishop's Adviser for Self-Supporting Ordained Ministry – this is warmly welcomed and most strongly encouraged.

2. Preparing for Retirement / Applying for PTO: SSOM Considerations

For stipendiary colleagues, the move to PTO / retirement can be significant, not least as they cease to receive a stipend, and, more often than not, have to move home, leaving behind a church, home and community in which they were settled.

The 'change' for SSOMs is often more 'hidden', not least as most will remain in the same house - their own home and will still want to play a part in their existing / local church after the age of 70 years, whether they retire or seek PTO.

It should be remembered whatever the SSOM decides moving forward, that the church they attend post-70 may well be a church which the SSOM has attended for many years, and they may have been a primary point of contact within the parish. This can add an extra dimension to retirement / receiving PTO that perhaps does not affect stipendiary colleagues.

Thus, for most SSOMs who move to PTO, or who retire, it may seem, superficially, like not much has changed.

Nevertheless, the move to PTO is a significant event and perhaps can trigger a 'change' in how they identify or are identified as an ordained minister. It is important therefore that SSOMs, pre-retirement, think what this 'new identity' might look like.

As stated above, the SSOM should meet with the Bishop's Adviser for Self-Supporting Ordained Ministry and/or the Bishop's Adviser for Curate Development and Clergy Transitions **at around the age of 65 years**. This will give time to consider and fully explore the range of options that might be open to them.

Thereafter, the SSOM should:

- a) During an MDR review, ideally at least two years before the SSOMs 70th birthday, review their recent ministry, and share with their reviewer and Incumbent the nature of their contributions.

- b) Consult, discern and pray about the style and extent of ministry they can envisage for the next 3-5 years – thus, the transition period from being SSOM to a holder of PTO (if they choose to seek PTO): what might ministry ‘look like’ moving forward?
- c) Consider seriously whether ministry post-70, if PTO is applied for, will be largely based in their current parish, or possibly elsewhere.

The SSOM, at the age of 68 years, may well wish further support and engagement from the Bishop’s Adviser for Self-Supporting Ordained Ministry and/or the Bishop’s Adviser for Curate Development and Clergy Transitions, in assisting them to envision further plans for and patterns of ministry.

As every SSOM is different, with varying gifts, qualities and skills, as well as ministering in differing contexts, it is impossible for this *Guide* to outline the range of possible ministerial patterns, as these should be bespoke to the PTO holder.

That said, the ‘shape’ of any future ministry may include things the SSOM is not currently involved in, such as:

- Cathedral Chaplaincy
- Waterways, or others ‘types’ of chaplaincy work
- Spiritual Direction / Accompaniment

However, in practical terms, the below table may assist in envisioning what some of the key *practical* changes may look like:

	Under Licence	In Receipt of PTO	Retired from active ministry
Member of the PCC	✓	✗ ¹	✗
Member of Chapter	✓	✗ ²	✗
Member of Deanery Synod	✓	✗ ³	✗
Can claim CMD grant	✓	✗	✗
Eligible for MDR	✓	✗	✗
Fees for Occasional Offices	✗	✓ ⁴	✗

Notes:

1. Clergy in receipt of PTO do not automatically have an *ex-officio* seat on the PCC. They need to be co-opted on to the PCC, should they wish to continue to play an active role on that body – many do not wish to do so!
2. Clergy in receipt of PTO are not automatically a member of Deanery Chapter. Usually, 1 in 10 clergy in receipt of PTO are elected or nominated by all clergy in receipt of PTO in any one Deanery. However, the Rural Dean does have some discretion re: attendance at Chapter. (SSOMs in receipt of PTO are however reminded that they are still a full part of the Diocesan-wide SSOM Chapter).
3. Clergy in receipt of PTO are not automatically a member of Deanery Synod. They cannot, even if a co-opted member of their PCC, be voted on to the Deanery Synod. Deanery Synods do however have representation from clergy with PTO. More details are available from Rural Deans.
4. Once an SSOM is in receipt of PTO, they can claim fees for occasional offices and services, as per any clergy who have PTO. See the *SSOM Handbook* for more details.

Clergy in receipt of PTO are nevertheless reminded that they are still an ordained minister and still 'wanted' and valued by the Diocese.

NB, without PTO, clergy are not permitted to exercise ministry on behalf of the Church of England, and so cannot carry out activities including:

1. Leading and preaching at any service
2. Communion by extension
3. Home Communion from the Reserved Sacrament
4. Leading Retreats or Quiet Days
5. Leading Lent Groups / Bible Study / Home Groups / Alpha Groups etc
6. Participating in missions, acting as a peer reviewer for MDR, or lead CMD courses
7. Representing the Diocese or Church of England in bodies or visits
8. Spiritual Direction or Accompaniment, where PTO is a normal requirement
9. Pastoral visiting in an official capacity as a priest, as opposed to a neighbour or friend
10. Robing or processing during the Chrism Eucharist (although they may stand to renew their Ordination vows)

The Bishop's Adviser for Self-Supporting Ordained Ministry, as well as other Ministry Officers at Church House, including the Archdeacons and Bishops, are always willing to meet with the SSOM and discuss any of the above points, as well as any wider considerations around retirement and/or PTO.

Likewise, the **Bishop's Ministry Administrator** is available to answer any questions or queries regarding DBS renewal and the PTO process.

3. Permission to Officiate

A ministry with 'Bishop's Permission to Officiate' (PTO) is in the gift of the Diocesan Bishop and then by invitation(s) from the / an Incumbent.

Having met with the Bishop's Adviser for Self-Supporting Ordained Ministry and/or the Bishop's Adviser for Curate Development and Clergy Transitions at the age of 65 years, and then from the age of 68 years of age, begun to discern what ministry might 'look like' post-70, the SSOM might then decide to apply for PTO.

NB, 'PTO' isn't *just* about 'officiating' at the Eucharist, at funerals etc. but includes officiating at, exercising and undertaking all aspects of ordained ministry.

Before an application for PTO is made, the following needs to have occurred / be in place:

- The SSOM needs to know what ministry might 'look like' post-70 – including deciding whether they will move parishes.
- The SSOM needs the support of a 'Designated Responsible Person', usually their Incumbent (or Rural Dean, if the parish is in vacancy), in order to apply for PTO. This is the person with direct pastoral care for the PTO holder, as well as to whom the PTO holder is accountable.
- All Safeguarding Training must be up to date.
- The SSOM must have DBS clearance. The renewal of DBS certificates post-70 is administered by the Bishop's Ministry Administrator

It is suggested that any application for PTO is made at the first available opportunity, thereby allowing the administrative and legal aspects of the process to be fulfilled in a timely fashion, and certainly by the SSOMs 70th birthday. It is therefore suggested that at least six months should be allowed for this process, but the PTO will not come into 'effect' until the three-six month break has been completed.

The application paperwork is available on request from the Bishop's Ministry Administrator, based at Bishop's House.

This paperwork will include a **Statement of Agreed Expectations**. This is akin to a brief / summarised version of a Ministry Agreement.

Once an application has been submitted for PTO, a conversation with a Suffragan Bishop will be arranged to explore the envisaged ministry before PTO is granted.

The granting of PTO is confirmed by issue of a certificate, accompanied by guidance notes, to the SSOM. An advisory email is sent to the Designated Responsible Person. PTO certificates are only issued up to the expiry date of the relevant DBS certificate, and are renewable every three years thereafter, up to the age of 80, where PTO is renewed annually.

Once PTO is received, and the PTO holder wants, and is invited to continue to minister on a regular or settled basis in a particular parish, then a Ministry Agreement (in addition to the **Statement of Agreed Expectations**) will help everyone to have some clarity of expectation, including around fees. (Please see the *SSOM Handbook*, which covers Ministry Agreements and expenses / fees. The appendices of the *SSOM Handbook* also includes a template for the Ministry Agreement. This document can be found on the SSOM page of the Diocesan website).

The PTO holder should not officially finalise the Ministry Agreement with their incumbent until three–six months after the date of receiving PTO (although it is recommended this is drafted before the meeting with the Suffragan Bishop, as it will inform that meeting). This will allow a time for reappraisal after a period of rest and refreshment. However, an agreement is not in any way a ‘fixed’ unchangeable document. Indeed, the best agreements are ‘live’ and dynamic!

Having a Ministry Agreement with a particular parish does not however preclude ministry elsewhere.

NB, the Ministry Agreement should reference the ‘Statement of Agreed Expectations’, which is a summary of the Ministry Agreement,

If the SSOM is to exercise PTO primarily in a parish different from that in which they were licenced, perhaps because at the age of 70 they ceased worshipping there, then a Ministry Agreement needs to be drawn up with their ‘new’ parish, as detailed above.

For PTO holders for whom their Designated Responsible Person is not the Incumbent, the Designated Responsible Person should also be involved in drawing up the Ministry Agreement.

Therefore, it is **a requirement that a Ministry Agreement is put into place**, as directed above.

Ideally, when the SSOM ends their service under Licence, even if they are to remain in the parish, and continue to minister as a PTO holder, this transition / change should be marked with parochial / community expressions of appreciation and followed by the suggested period of three–six months rest before the resumption of any form of ministry under PTO.

Resuming after a break, if remaining in the same parish, should then be celebrated in an act of worship or other appropriate event emphasising the diversity of ministry available locally. The change in the SSOMs title, often from 'Associate Minister', 'Assistant Priest', etc. to 'Honorary Associate Minister', 'Honorary Assistant Priest' etc should also be marked.

Incumbents, Churchwardens and PCCs are strongly encouraged to ensure these key transition points are marked and celebrated in the worshipping life of the parish.

The SSOM, once in receipt of PTO, will find it helpful to consider how they respond to invitations to minister now that their licensing arrangements have been changed (NB, PTO is ministry 'by invitation' only, although parishes are encouraged and expected to affirm and respect the ministry of PTO holders).

Should a parish go into a vacancy, the PTO holder must ensure all responsibility rests with the Rural Dean and Churchwardens, who can 'invite' as they choose. This is the case whether the SSOM ministers by licence or through PTO. It is hoped however that Churchwardens will value the immense experience the PTO holder can bring in supporting a vacancy. That said, the PTO holder should not feel compelled to undertake every service in church or take on the responsibilities of an incumbent – being PTO gives them greater flexibility to say 'no'!

If the PTO holder is established within the parish, perhaps having been an SSOM in the parish before holding PTO, then they may wish to play a fuller role within the vacancy. Please see the section entitled 'Vacancies' in the *SSOM Handbook* for further details and guidance.

With the arrival of a new Incumbent, the Ministry Agreement (if there is one) should be reviewed fully as explained in previous sections, and as detailed in the *SSOM Handbook*.

For clarity, it is worth emphasising that the PTO holder is not in any sense 'in charge' of the parish and thus has no 'legal' responsibility for the life and work of the Parish.

If the PTO holder lives outside the parish in which they worship, they should, out of courtesy, inform the incumbent of the parish in which they reside of their status within the Church of England.

4. Preparing for Retirement / Applying for PTO: Parochial Considerations

Incumbents / Churchwardens / PCCs / Parishes **with an SSOM entering retirement** should:

- Mark the retirement of the SSOM with a service that expresses appreciation and thanks for all that has gone before. Deanery and Diocesan staff could also be invited to this celebration, which may take the form of a service of thanksgiving.
- Ensure post-retirement that appropriate pastoral care is put in place for the now 'retired' ordained minister.
- Recognise change can be unsettling for the retiree, and ensure, even though they are not carrying out formally recognised and licensed ministry on behalf of the Church of England, that they still feel they 'belong' and are important in and to the wider life and work of the parish.

Incumbents / Churchwardens / PCCs / Parishes with **an SSOM who is applying for, or now in receipt of PTO** should:

- Consider the current and future ministry needs of the parish. There is a task to discern how resources and gifts available should best be developed in the next period of time.
- Recognise that the change from licenced ministry to PTO can be unsettling for the SSOM. Parishes must therefore ensure, whatever 'shape' ministry takes under PTO, that the PTO holder still feels they 'belong' and are important in and to the wider life and work of the parish. This is especially important if the PTO holder was previously licenced as an SSOM in the same parish.
- Remember that clergy operating under PTO do so at the express invitation of the Incumbent – invitations which can be accepted or declined. For someone who wishes to continue to play a regular part, the process is eased by the creation of a Ministry Agreement that should be drafted before the transition, but only finalised and ratified by the incumbent about six months after the 'transition'.

- The ending of the SSOM's service under Licence should be marked with parochial / community expressions of appreciation and followed by a period of around three-six months before the taking up of any form of ministry under PTO. Deanery and Diocesan staff could be invited to this celebration, which may take the form of a service of thanksgiving.
- In this three-six month period, it is very important that the congregation / community grow to understand the changing nature of the SSOM's future involvement in ministry. Every effort needs to be made to communicate the change, in a way that preserves the PTO holder's dignity and respect - and fresh points of contact need to be established and well publicised to help all concerned.
- The start of PTO ministry in the parish could be marked with a special celebration and used as an opportunity to outline the diversity of ministries exercised in the parish, within which the 'new ministry' of the PTO holder will sit. Deanery and Diocesan staff could be invited to this celebration, which may take the form of a service of thanksgiving.
- Decide 'locally' what 'title' the PTO holder will assume.
- Ensure, through parochial returns, that PTO holders are included in the Diocesan Cycle of Prayer – this will not automatically happen and has to be initiated via the parish
- In any ensuing vacancy, when responsibility for the parish rests with the Rural Dean and Churchwardens, although the PTO holder can be invited to conduct worship etc., recognise that it is their decision whether to accept or decline that invitation.
- When drawing up a Parish Profile, as, when and if the parish enters a vacancy, it is important the PTO holder is adequately referenced in that document, including an overview of their parochial (and wider) commitments, as detailed in the Ministry Agreement.
- With the arrival of a new Incumbent, any Ministry Agreement should be reviewed fully as detailed elsewhere.
- Although the 'voluntary nature' of the ministry of the PTO holder continues, they can claim all fees due to clergy in receipt of PTO.

Incumbents, Churchwardens and PCCs are strongly encouraged to ensure all key transition points, as above, are marked and celebrated in the worshipping life of the parish.

Likewise, Incumbents, Churchwardens and PCCs are reminded that SSOM clergy who move to PTO still need to feel they belong and are valued – especially if they have previously been a licenced SSOM within the parish. This can be achieved by ensuring they are a full part of the Ministry Team, if this is agreed and recorded in the Ministry Agreement.

For further information, support and guidance regarding retirement and/or PTO, please feel free to contact the Diocesan PTO (Retirement) Officer(s) or the Director of HR at Church House.

Equally, the Bishop's Adviser for Self-Supporting Ordained Ministry, the Bishop's Adviser for Curate Development and Clergy Transitions, and other staff at Church House, including Bishop's Staff, are also available to offer information, advice, and guidance, as well as to facilitate and broker meetings.

Likewise, the **Bishop's Ministry Administrator** is available to answer any questions or queries regarding DBS renewal and the PTO process.

Conclusion

It is hoped the information above provides some clarity around SSOMs and how and when they move to PTO, if they still wish to continue in a formal ministerial role.

Assuming the SSOM moves to PTO, although the SSOM 'status' has ceased, **any clergy who hold PTO having been an SSOM prior to receiving PTO, will still be on the 'Diocesan SSOM List'**. That means they will still be invited to any Diocesan SSOM Events, despite not legally retaining the status of being SSOM. This is to ensure 'ex-SSOMs' still feel valued and supported, as well as still a part of what we strive to be and do as a Diocese.

It is believed that by ensuring SSOMs who move to PTO remain a part of the SSOM Diocesan Network, they can still fully contribute to the wider life and work of the Diocese. Attendance at any SSOM events is however entirely voluntary.

It is also worth emphasising, any SSOMs who move to PTO are reminded that ongoing **Safeguarding training is absolutely non-negotiable - non-compliance will result in either PTO not being granted or being withdrawn**. Without PTO, clergy post-70 cannot operate as an ordained minister in or for the Church of England.

More information regarding what Safeguarding training is required, can be found in the *SSOM Handbook*, on the 'SSOM Page' of the Diocesan website.

NB, it is the responsibility of the PTO holder to keep all Safeguarding training up to date, so it is important a careful note is made of any expiry dates etc.

Remember, the Safeguarding Team at Church House are always available to answer any questions or queries regarding training.

Likewise, the Bishop's Ministry Administrator is available to answer any questions or queries regarding DBS renewal and PTO.

There are a wealth of resources and books that can support SSOMs in living their vocational response to God's Call, including through and at retirement. The following books may be of particular use to all those who are SSOM or work with SSOMs in whatever capacity, including those holding or exploring incumbency

roles (with the last book being especially relevant to those SSOMs approaching 'retirement' / applying for PTO):

- John Lees, *Self-Supporting Ministry: A Practical Guide* (SPCK, 2018)
- Jenny Gage, *Priests in Secular Work: Participating in the Missio Dei* (Sacristy Press, 2020)
- James Francis, *Busking the Gospel: Ordained Ministry in Secular Employment* (Sacristy Press 2021)
- Tony Neal & Leslie Francis, *A New Lease of Life: Anglican Clergy Reflect on Retirement* (Sacristy Press, 2020)

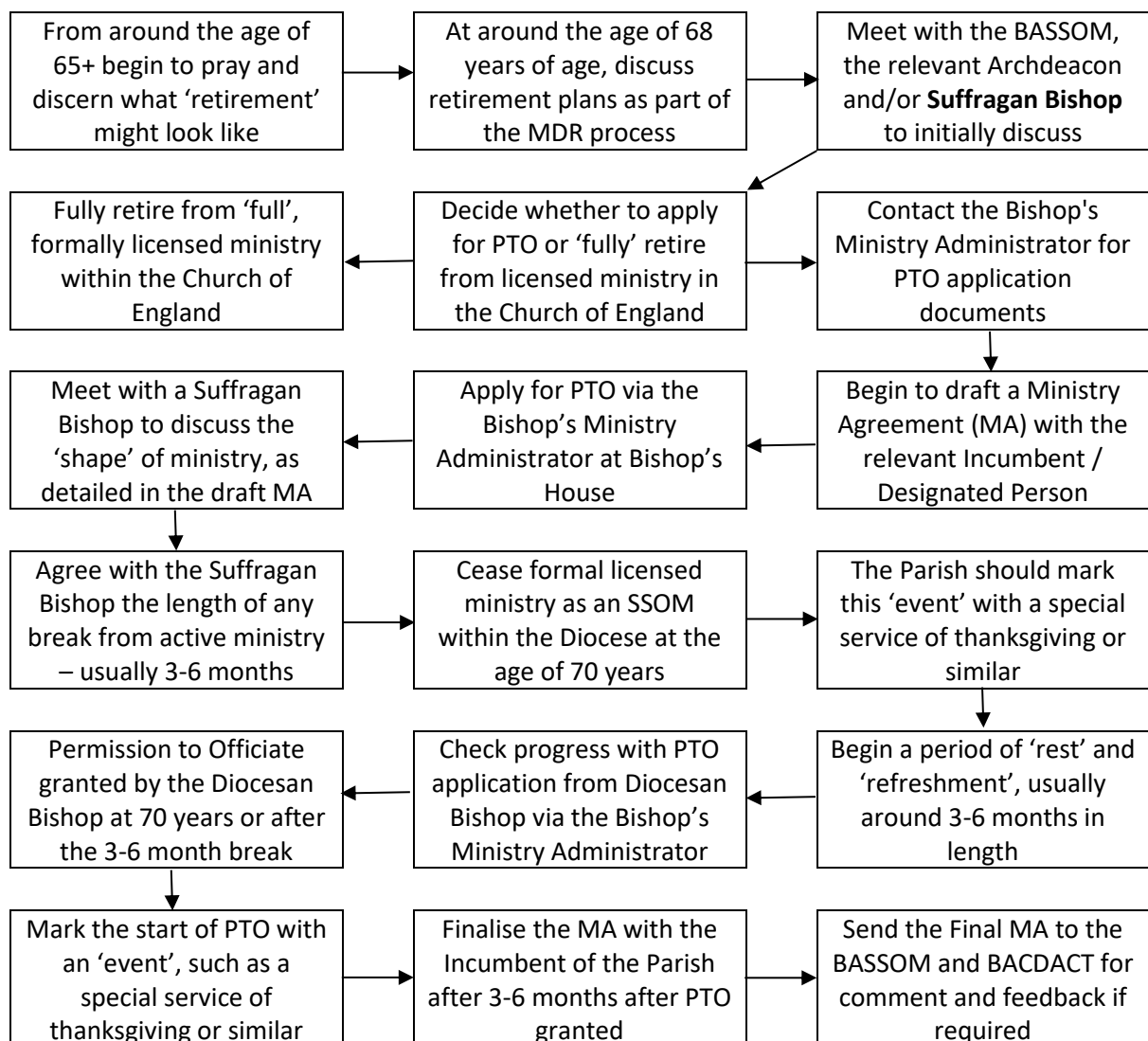
The below publication, 'Ministry after Retiring from Office', published by the National Church also contains useful information, but please ensure 'local' / diocesan arrangements take precedence over this publication:

https://www.churchofengland.org/sites/default/files/2022-04/ministry_after_retiring_final_final_april_22.pdf

Appendix

Simplified 'flow-chart', detailing the above processes. Fuller detail can be found elsewhere in this publication.

NB, ideally the process of applying for PTO should be completed, ready for 'issue' at either the applicants 70th birthday, or more often, as and when the three-six month break has ended.



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