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CHAIR OF DISTRICT

The Revd Angry Long

DISTRICT SAFEGUARDING OFFICER

Howard Smedley

07758 239286 / 01332 579343 safeguarding@lincolnshiremethodist.org.uk

Pastoral Visitors and Safeguarding – District Good Practice Guidance
Revised September 2024

Please note: This document is guidance EXCEPT for the use of the two role outlines at the end that are to be used without changing or amending

1. Introduction.

The work of Pastoral Visitors (**PVs**) lies at the heart of the life and work of local churches within the District, walking alongside those who need help to show care, compassion and love. It is clear that for many, pastoral support is invaluable and helps affirm that they are not alone and are valued.

Pastoral visiting helps to engage with people to offer appropriate support. However, it is clear that there are a number of different ways the work is currently being undertaken within the District and so at the request of many in this role it is necessary to offer good practice in bringing a consistency, where possible, of how the work should look, especially in relation to safeguarding.

This guidance is, therefore, based specific issues raised by individual PV's seeking their own clarification of best practice.

It is not Policy but is offered as guidance to good practice. It will for each Circuit to identify what aspects of it suits the needs of the local churches and the way they wish to develop the work of PVs.

This Guidance should be read alongside:

- The Lincolnshire Methodist District Safeguarding Policy 2024
- The Lincolnshire Methodist District Safer Recruitment Policy 2024;
- The Lincolnshire Methodist District Procedural flowchart 2024;
- The Person in the Pew flowchart 2024

2. The significance and importance of the work.

Those who undertake any form of pastoral visiting are in a significant position to be able to get to know and understand the needs of those they are supporting. This naturally means that PVs are well placed to offer appropriate practical help and where necessary pass concerns on to the Co-ordinator for further advice.

It certainly means that they get to know the day-to-day issues facing people, some of which may require help and PVs will need help to know how and where to refer concerns to.

Given the significance of the role, it is important that the work of PVs is given the right profile and the highest respect and therefore those in the role are connected in to all the relevant District processes, especially safeguarding. It would be good for PV's to see themselves as part of the rolling programme of safeguarding meetings and workshops held at a District level throughout each Connexional year

3. Some considerations.

By definition, the suggestion is that pastoral visiting is about those who reach out, through visits to people's homes, wherever and whatever those may be. Much of it is in fact done within the person's home, hospitals or care home settings. There are some important considerations:

- **The term "visitor" should not always mean that we confine the role just to visiting.**

Such contact could be by way of informal discussion at church, after church, through church activities etc. These are all opportunities to make important contact identifies how someone is at a particular time and what help, if any, they need at that time or in the future.

However, it is good practice not to confine all pastoral contact to the above settings as visiting the person at home or where they live helps to get to know much more about their situation, who is part of their life and the environment they live in.

- **There is an important difference between social visiting as a friend and pastoral visiting on behalf of the church.**

Becoming a PV does not, of course, stop that person visiting someone too as a friend. However, visiting as a PV means that someone is being visited on behalf of the church, not just as a social friend. Supporting someone as a friend has clearly different expectations and experience shows that it will be harder as a friend to report concerns and break confidences.

Visiting on behalf of the church means that the visitor has been "sent", is accountable and does not work in isolation of a wider team. It particularly reinforces that the PV has a responsibility to report any concerns on behalf of, and to, the church as per the Responding Well (District Safeguarding) Flowchart procedure. It means that the visitor is part of a team which should work to support each other and meet regularly to discuss common issues.

This distinction is somewhat more difficult for smaller churches where it is likely that people support each other in a more natural and informal way given the size of the church and the fact that people are likely to know each other well. It will still be important, however, that there is an understanding that should there be any concerns about each other, people know where to go for help.

4. Key principles:

The following are areas of good practice identified by PVs in the District themselves as being essential in supporting their work.

- **A Team Approach.**

It is important for PVs to see themselves as part of a team and not working in isolation. That team approach will need very careful co-ordination and the opportunity for meeting as a team to not only encourage a team approach but to ensure everyone is working together to understand their role should be encouraged and promoted. In particular, the team approach allows PVs to be mutually supported.

- **Acting on behalf of the church.**

Methodist CPD makes clear that:

"Pastoral Visitor' means a person appointed by the Church Council or by a responsible committee under its authority to exercise pastoral care over those committed to his or her charge..."

It is important therefore to understand the distinction between social visiting and visiting on behalf of the church. Social visiting is more about friendly contact but without the need necessarily to get over-involved in the person's day-to-day affairs.

Acting on behalf of the church means that the PV is representing the church, is from the church and therefore is accountable to the church. For the PV, this will give a sense of security knowing that they are not operating in isolation of the church but with its support.

The critical implication of acting on behalf of the church is the need to be accountable back to the church.

- **Different Pastoral Visiting roles.**

It is clear that all those involved in Pastoral Visiting operate very differently. Some prefer to "call in" and simply check that all is well, others are keen to become more involved in the overall welfare of the person sometimes involving longer and more in-depth discussions.

PVs will be walking alongside people and should not give themselves the responsibility of having to “sort” out concerns. It will be for others, possibly external agencies, who may need to do that. The critical issue will be for the Pastoral Co-ordinator to be informed.

Therefore, there is the opportunity in the District for those wanting to be a PV to be able to decide the sort of role they want to take. **There are two role outlines that apply and these can be found at Appendix (i)**

It will be even more important for the Co-ordinator to ensure that this role is not extended or expectations changed without further discussion, or that the PV takes on a role which should be left to professionals.

The different levels of involvement as a PV will have significant relevance to what type of criminal record check (DBS) is required.

- **Governance.**

Good practice is for someone to oversee the work of PVs in the church and circuit and that person will have a key responsibility for supporting, equipping and developing the team. The most common role is one of a Pastoral Co-ordinator. It is often taken by the Minister but in some cases can be assigned to someone else to release the Minister from those responsibilities. (*See Appendix ii*).

Good practice would suggest that a lay co-ordinator is best so as to leave the Minister in a better place to follow up any concerns where necessary.

It would be to that person that people would go to initially with any issues, especially for advice and support. It does need to be a pro-active role in working alongside the PVs to know who they are, how they are coping with their role, and chairing meetings when everyone comes together.

The Co-ordinator role works best when it acts as “the hub” of the team into which information should go and from which information should be disseminated.

Where the Co-ordinator is not the Minister, consideration should be given as to whether that person should ideally **not** be involved in visiting but remain as overall Co-ordinator role. Best practice shows that this allows for the Co-ordinator to concentrate on the administration of the team of PVs, their development and allows them to give advice when needed.

The Co-ordinator should work closely with local church and circuit safeguarding officers to identify any worries or concerns.

If the Co-ordinator role is shared, it will be important that there is common agreement between those sharing the role about the vision of how the work will develop.

Good practice would be for a Pastoral Committee to support the work of the Co-ordinator and to oversee the development of the work and team as a whole and to have in mind the strategy and vision of the work. This could include the Co-ordinator, Minister, Church/Circuit Safeguarding Officer and a pastoral visitor (s).

- **Recruitment.**

In line with the new Safer Recruitment District Policy (**revised September 2017**), all PVs should be recruited to their role. They should understand and have sight of their role outline, be interviewed for the role, however informally, and have references taken up.

The Co-ordinator, and if there is a Pastoral Committee, must undertake this no matter how formal or casual someone expressed their interest in becoming a PV. It will be particularly important that the PV understands to whom they are accountable as well as their duty to report safeguarding concerns should they arise.

- **Commissioning.**

There is available an outline for the commissioning of all PVs within the Methodist Worship Book. The use of this service recognises and publicly acknowledges the importance of the role.

- **PV meetings.**

The PV should be a part of a wider team of PVs who should meet together at agreed and regular intervals. The meetings will serve many purposes and have a number of benefits;

- ***To bring together PVs to simply keep in touch with each other as a team and support each other;***
- ***To share common issues that are being faced, discuss together how to best resolve them and develop good practice;***
- ***To discuss any particular situations that have caused difficulty or confusion;***
- ***To identify training and development needs;***
- ***To, on occasions, bring someone in to speak on a particular topic, to further equip PVs in their knowledge and understanding.***

Regular support meetings are a good pattern if the spirit of team working is to be fostered and effective. Without regular meetings of this type, PVs may feel isolated, disconnected from each other and not up to date with relevant District developments that impact their role.

- **Safeguarding – Responding Well.**

Many concerns which arise from those receiving support will be able to be dealt with practically and speedily. Many concerns can be dealt with by referring to the person's family or circle of friends or some practical support from the church.

However, and from time to time, something may arise that necessitates wider assessment and advice from elsewhere.

Within the District there are already established procedures for passing on concerns. The Responding Well District flowchart will be available and displayed within local churches and states that all safeguarding issues must be passed on to the Co-ordinator and/or Minister for attention and the necessary help agreed. This must be done even when the PV does not have consent to do so if it felt that that person has suffered, or is likely to suffer, harm. The District Safeguarding Officer should be contacted if further help and advice is needed.

All concerns should be recorded on the District Safeguarding form and signed as appropriate.

It is important to stress that the fear of involving external agencies, invading people's privacy and spoiling relationships should not detract PVs from seeking advice.

- **Information gathering.**

Appropriate systems should be in place to support the work of PVs:

- *Information should be held on which PVs are linked to which member of the church;*
- *Appropriate limited information on each PV, especially to ensure they can be contacted in emergencies or for support, should be held with their consent;*
- *Where possible, it is advisable for PVs to have important telephone numbers on their person, especially in case of emergency – Minister/Co-ordinator, Church/Circuit/District Safeguarding Officer, Police etc.*

Over time, many PV's build up a network of contacts with local and external agencies which can prove very useful in responding to concerns quickly and practically. These contacts should be made available to the team to make good use of them. There are examples of some churches having simple and accessible directories made up of PV contacts which have been pooled.

- **Training.**

It is necessary for PV's to undertake Creating Safer Spaces Foundation Training (2016) which is then refreshed every 4 years.

The District will commit itself to including PVs, through the appropriate Co-ordinator, in the dissemination of all relevant information and from time to time create opportunities to get them together to share common themes and developments.

Training which reflects the current trends in safeguarding should be made available to PVs either locally or through external training events (e.g. Domestic Violence, Mental Health, Adults who are vulnerable etc.).

PV's will benefit from attending all safeguarding meetings held across the District and special training events.

The District has its own training package for those in a Pastoral Visiting and Co-ordinator role

5. Other good practice guidelines.

IDs –Although the PV may be well known by those being visited, ID serves a number of purposes;

- *It shows that PVs are there on behalf of the church;*
- *Others who they might meet (family, staff in hospital or care homes) can see that the PV is acting in an official capacity;*
- *It sets an example of good standards and practice;*
- *It shows other organisations that we take the role seriously.*

ID could be in the form of a badge type which could be worn or carried on the person should proof of ID be required.

Useful telephone numbers, as previously mentioned, could be added to the reverse side of the ID.

Recording visits – It is good practice to make a simple note when a PV has had contact, especially by way of a visit but **not** a detailed record of what occurred in that visit. This is important for several reasons:

- ***To help to record who has been seen, including dates and times;***
- ***To avoid disputes if someone feels they have been unsupported;***
- ***In the rare case of a complaint being made, there is a record of what support has been offered and/or if someone has been in someone's home at a particular time/date;***
- ***To support accountability.***

There are a few ways this can work:

- The PV themselves could make a note in a diary or similar just to show when they visited or had contact. Nothing more than that will be required;
- The Co-ordinator could hold a central record of when visits are made as informed by the PVs.

If a note is taken or central record kept of visits, it will be important to keep that record or the means of the record for the foreseeable future and until archiving policies are clearer.

Contact with other settings – nursing homes, hospitals etc. It will be important that PVs who have contact with people in various care settings understand their duty of care should they be concerned about the quality of care being offered or the standards of the environment they are in. Any concerns should be passed to the Co-ordinator/Minister.

Safeguarding the PVs.

It will be important that the well-being of the PVs is a high priority. They will need their own level of support from the Co-ordinator/Minister. As well as regular team meetings, from time to time each individual PV could be spoken with on a one-to-one basis, however informally, to ensure all is well.

It is, of course, not always possible for more than one pastoral visitor to visit or deal with a situation together. Some situations, although rare, will need careful consideration as to whether this should be the case where possible. Some situations may need a careful risk assessment to ensure all are safe.

Providing transport in the role of a Pastoral Visitor.

The District Safeguarding now states that all those offering transport and lifts as part of any role must have the correct car insurance in place, that is cover for a volunteer providing transport.

In addition, duty of care must be exercised to ensure drivers are fit to drive and will not put anyone, including the general public, at risk.

Prayer and Spiritual advice offered by PVs.

Prayer should be by invitation and not assumed as obvious. Spiritual advice is best in the form of encouragement rather than specific advice. If this is clearly needed, this should be referred to the Minister.

Appendix (i)

The following covers the two role outlines which PVs should consider appropriate to the role they wish to take on. This is the only part of this guidance which must be followed as written and has been approved by District Council in line with Safer Recruitment requirements.

1. Pastoral visitors – role outline for those who visit or have contact with someone concerned for their general well-being and support needs.

This pastoral visitor may do everything from delivering a newsletter, calling in for social conversation and engagement or to assist in support with someone given the person's circumstances and requests for help:

- To visit to offer opportunity for discussions about life events, current issues and concerns;
- To support someone with a particular task but not personal care or personal affairs e.g. talking through a particular situation that is worrying someone, signposting them to appropriate services and/or requesting spiritual support from the Minister/deacon;
- To support others – family members not on pastoral lists – if required;
- To enquire about a person's general health and well-being in more depth to be sure a person is not vulnerable in any way;
- To offer prayer if required.

This role requires a DBS check (Enhanced).

2. Pastoral Visitors – role outline for those who visit and have contact regularly and undertake specific personal care tasks.

This pastoral visitor will meet offer more regular contact and may be involved in more personal care in respect of adults. This could include contact with the persons family, especially children:

- Have contact once a week, 4 times a month and if necessary in the night in respect of contact with children in any families being supported;
- Undertake personal care tasks for the individual and see to personal life affairs (bank, bills, shopping etc.);

- Hold information about an individual which is personal and indicative of their personal affairs.
- Act as a representative of an individual as required and with permission.

Such a role should only be undertaken with the complete approval of the Co-ordinator and Minister and will require a DBS check and Barring Check.

Accountability for all Pastoral Visitors.

PVs will be accountable to the Co-ordinator and the Pastoral Team.

Safer recruitment.

All Pastoral Visitors will be recruited as per the District safer Recruitment Policy and will be subject to informal interview, references and DBS checks as appropriate.

Confidentiality.

PVs will respect and adhere to confidentiality in all aspects of their role.

Appendix (ii)

Pastoral Co-ordinators – role outline

Overall responsibility.

- To co-ordinate and administrate the work of Pastoral Visitors.

Key responsibilities:

- To act as central point for support for all PV's;
- To act as a central point for the receiving and giving of information;
- Maintaining a central library of relevant information;
- To co-ordinate the lists of who is being supported by which PV;
- To constantly review that list to ensure suitability of matching;
- To keep appropriate records of such lists;
- To co-ordinate regular PV meetings;
- To ensure PV's are appropriately recruited, DBS checked if appropriate and offered support and induction;

- To receive safeguarding concerns and pass them to the Church/Circuit/District safeguarding Officer and/or Minister;
- To identify, through a team approach, any training or development needs

Accountability for all Pastoral Visitor Co-ordinators.

Co-ordinator will be responsible to the Minister and the Pastoral Team. If a Minister, to the Pastoral team and Superintendent.

Safer recruitment.

All Pastoral Visitor Co-ordinators will be recruited as per the District safer Recruitment Policy and will be subject to informal interview, references and DBS checks as appropriate.

The role requires a DBS check given its overseeing role. If the Co-ordinator is the Minister then they are required to have the necessary DBS checks as part of their Presbytery/Deacon role.

Confidentiality.

PV Co-ordinators will respect and adhere to confidentiality in all aspects of their role.