

Pastoral Visitor Guidance



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This guidance is provided to support your work as a pastoral visitor undertaking contact with members of the Methodist Church. It may also be of relevance to other groups undertaking pastoral work.

Our Calling

The calling of the Methodist Church, which is relevant to all levels of church life and first expressed by the Methodist Conference in 2000, is being reiterated today.

Our Calling will form a foundation for all that pastoral visitors do in the local church.

The calling of the Methodist Church is to respond to the gospel of God's love in Jesus Christ and to live out its discipleship in worship and mission. It does this through Worship, Learning and Caring, Service and Evangelism.

The Church exists to:

- Increase awareness of God's presence and to celebrate God's love (Worship)
- Help people to grow and learn as Christians, through mutual support and care (Learning and Caring)
- Be a good neighbour to people in need and to challenge injustice (Service)
- Make more followers of Jesus Christ (Evangelism).

(Adopted by the Methodist Conference, 2000)

The care of members of the church, listening to and building relationships with them, is an essential aspect of your role as a pastoral visitor; a role that is key as the church lives out Our Calling.



The Role of the Pastoral Visitor

Pastoral care is at the centre of the church's mission and ministry. We love because God first loved us (1 John 4:19) and pastoral care is our response to God's unconditional love. Through Jesus' teachings we are called to recognise the unique value of each individual, to offer ourselves in service to others, to share in a mutual ministry of caring and to care for all.

'A pastoral visitor is 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, and to fulfil such other duties as may be prescribed by this Deed or by Standing Orders.'

CPD, Book II Deed of Union Section 1 Interpretation (1. xxvii).

The role of the pastoral visitor is vital in the structure of the Methodist Church, linking people together and keeping them in touch with church life. As a pastoral visitor you may support others in their faith and discipleship by listening, offering to pray, discussing issues of concern and providing reassurance and comfort at times of need

A pastoral visitor will be aged 18 years or over and be a member of the Methodist Church (SO 630 (1a)).

The role of a pastoral visitor is (SO 631);

- to exercise pastoral care over those committed to his or her charge;
- to visit those on his or her pastoral list regularly;
- to encourage members to fulfil their commitments as set out on the ticket of membership, and where appropriate to encourage others to consider the claims of membership;
- to inform the minister or probationer having pastoral responsibility of any special need or change of address;
- to pray regularly for those on his or her pastoral list.

These responsibilities may be undertaken in a variety of ways with differing levels of contact and support provided.

Acting on behalf of the church, as a pastoral visitor, you are representing and accountable to the church, working as part of a wider team and have a responsibility to report any concerns.



Training

All pastoral visitors will complete the Creating Safer Space: Foundation Module training within six months of taking up appointment (and refreshed every 4 years). This training equips all adults, working in different roles in the Methodist Church, both volunteer and paid, to be confident in sharing safeguarding concerns with the appropriate person.

Safer recruitment

Before the role of a pastoral visitor begins you should be safely recruited following the Methodist Church safer recruitment policies. You will be provided with a role outline which describes both the role you will undertake and the tasks you will not be doing.

Alongside discussing role outlines, you should be interviewed for the role (however informally), and have references taken up. It is important to be aware of who you are accountable to and your duty to report any safeguarding concerns.

Restrictions to Appointment

The role of pastoral visitor is one for which the restrictions of appointment (SO 010(2) (ii)) apply. This means that subject to the Rehabilitation of Offenders Act 1974, the following people should not be appointed to this role:

- Those with a conviction or caution under the Sexual Offences Act 2003 or Schedule 15 to the Criminal Justice Act 2003 or is included in a list barring them from working with vulnerable adults or children held by the Disclosure Barring Service (DBS).
- Those who have been subject to a Connexional Risk Assessment, where a Safeguarding Panel has concluded the person represents a significant risk of serious harm to children, young people or vulnerable adults.

There is a right of appeal in relation to the restrictions of appointment. Further information may be obtained from the district safeguarding officer.

Confidentiality

Taking on the role of a pastoral visitor brings with it a requirement to follow the policies, procedures and standing orders of the Methodist Church. There is also an obligation on behalf of the church to provide support to you in your role.

Privacy notice

Everyone involved in pastoral care – the visitor, the church, the church members – needs confidence in the extent of confidentiality required and to know when information should to be shared.

As part of this you will need to provide a privacy notice (or electronic link to an online version) to all those you have a pastoral contact with. (Appendix 3).

This will explain how data about them will be recorded, held and shared. By providing this information at the start of a pastoral relationship, realistic expectations are clearly laid out to form a strong foundation of trust and understanding.

Confidential information

A member should expect that any information they share with you will not be passed to others unless one of the following conditions is fulfilled.

- They give consent in advance for specific information to be shared. This, for example, might be a request for intercessions or spiritual guidance from a minister.
- The information disclosed indicates that they or another may be at risk of harm. With safeguarding concerns, the church must take action and this may include contact with the local authority or other statutory agencies.
- The individual indicates that they are involved in or likely to become involved in a significant criminal offence, or you believe that another party is involved or likely to become involved in a significant criminal offence.

It should never be assumed that family members, friends, ministers or other parties are aware of a situation without confirming this first with the member. Information should only be shared with the person's consent (unless one or more of the conditions above are met).

Confidentiality and safeguarding

Confidentiality may need to be waived if there is a safeguarding concern or if someone is at risk of harm. In these cases you will be supported by the church, circuit or district safeguarding officer to make a referral to the appropriate statutory services.

When making a referral, if an adult has mental capacity, they must consent to a referral being made, but those under 18 do not have to give permission. For more details on mental capacity see *Safeguarding Policy, Procedures and Guidance for the Methodist Church section 7.2.4*.

The adult disclosing a concern should be supported in sharing the information with the relevant agencies or encouraged to give consent for information to be passed on, on their behalf. All this will be supported by the safeguarding officer (church, circuit or district).

If someone refuses to consent to a referral, it must still be made if an adult or child is at risk from neglect, physical or emotional harm. *The Data Protection Act 2018, Schedule 1, Part 2* allows for sharing information, without consent, in such circumstances.

If, as a pastoral visitor, you consider that the person is under duress and unable to seek help, a referral can be made on their behalf. If this is the case, you must inform the safeguarding officer and pastoral secretary who will provide support in making a referral if appropriate.

In the following circumstances, it is not appropriate to inform someone, in advance, of a referral being made:

- If informing someone would create a risk of significant harm for a child or adult who may be vulnerable, (for example in a domestic abuse situation).
- If a criminal offence may have been committed and informing those involved would impact a police investigation or local authority action.
- If a child or vulnerable adult is at risk of immediate significant harm. In this case the pastoral visitor must make a referral to police or the local authority without delay and inform the safeguarding officer and pastoral secretary as soon as possible afterwards. (Appendix 4).

Confidentiality and technology

As a pastoral visitor you may be using technology to contact members, to follow up, to pass on information or to store records of visits. When using technology there are a number of key points to follow.

- Email, text, WhatsApp and other social media messages (Facebook, Instagram, Twitter) should be treated with the same level of care and security as written documents.
- Personal details of individuals should not be discussed whilst using a mobile phone in a public place.
- All sensitive information on computers and other digital storage should be password protected.
- Any email that contains personal data should only be sent with permission and should be treated with the same care and attention as any other written information being passed on.
- Documents stored should be converted into a secure format, such as a PDF, and password protected.
- All sensitive data should be deleted when disposing of, or passing on, computers.
- All paper documents containing personal or sensitive information should be shredded once they are no longer needed.

The Methodist Church has a clear policy regarding confidentiality. *With Integrity and Skill* is a report that offers guidance for good practice in matters of confidentiality for anyone who exercises a pastoral role (lay, ordained, paid or voluntary) on behalf of the Methodist Church. A full set of guidelines on confidentiality can be found at www.methodist.org.uk/for-ministers-and-office-holders/guidance-for-churches/pastoral-care/confidentiality-guidelines



Good practice

Conflicts of interest

As a pastoral visitor you may find there is a conflict of interest when asked to visit some church members. This could be due to a professional relationship, for example a provider of health or social care, or because of friendship.

There is a difference between social visiting as a friend and pastoral visiting on behalf of the church. If you do visit a friend you both need to be clear on the different expectations and the need for you, as a pastoral visitor to share information if there is a serious concern.

A conflict of interest may also arise if you are the pastoral visitor for more than one person in a family or other close group. It is helpful for family members have different pastoral visitors if this may be an issue. This is particularly the case in a situation of abuse within the family, where victim and perpetrator should not have the same pastoral supporter.

If at any time you feel there is a conflict of interest, you should discuss this with the pastoral secretary or minister.

Good practice in visiting

Before a visit contact the person to arrange a convenient time, date and venue, being sensitive to what is an appropriate length of visit. After the visit remember that anything talked about should not be shared with friends or family or shared in communal prayer without permission.

Visiting in hospitals and care settings.

When visiting in a hospital or care setting, you should report concerns, arising from the standard of care, to the church safeguarding officer. They will then ensure that the issue is raised via the provider's reporting system, or to the local authority and/or Care Quality Commission, as appropriate.



Support for Pastoral Visitors

Your local church will put in place an effective support structure for all pastoral visitors.

Support may include:

- regular meetings of pastoral visitors in the church or circuit
- contact with the minister or pastoral secretary
- support from another pastoral visitor as part of a buddy system

A team approach

Pastoral visitors are part of a team, not working in isolation. Meeting together ensures everyone understands their role and feels supported. A pastoral visitors' gathering should take place at least twice a year providing a place for support, discussion of common issues, to develop good practice to provide training or to identify development needs.

As pastoral visitor you will also meet at least once a year as part of the Pastoral Committee (SO 644)

Support from a pastoral secretary

A pastoral secretary will oversee the work of all pastoral visitors in the church, taking responsibility for equipping and developing you as a team. A key part of their role will be providing support and accountability for every pastoral visitor or arranging someone to provide this.

The pastoral secretary will be your first point of contact if you feel unable to continue with your role or need further assistance to do so.

Buddy system

A buddy system can allow pastoral visitors to support each other as they carry out their role. It can be particularly helpful when a new and an experienced pastoral visitor are paired.

Individual responsibility

When making arrangements for a visit, it is important to think about your own personal safety.

Considerations may include:

- the suitability of the location
- whether lone visiting is appropriate
- travel to and from the location at the time planned
- taking a list of useful phone numbers (e.g. the minister, pastoral secretary, safeguarding officer) and a charged mobile phone in case of emergency
- the use of a calling card or other form of ID with contact details for the local church
- ensuring someone (this could be a family member) knows about the location of the visit and the expected timeframe.

There are also occasions when it is better for more than one pastoral visitor to visit. Although rare these situations should be discussed with the minister or pastoral secretary, relevant risks considered and all decisions recorded.



Records

Why record?

Pastoral visitors should make a note when they have contact with someone, especially if a visit has taken place. This is important for several reasons:

- to help record who has been seen, including dates and times.
- to demonstrate accountability and transparency.
- to avoid misunderstandings and manage expectations.
- to identify any follow-up actions.
- in the rare case of a complaint being made, there is a record of what support has been offered and the times you were in someone's home.
- to record consent given for sharing information or the reasons why consent wasn't requested.
- to identify, over time, if someone is becoming vulnerable or needs additional support.
- to record information, which has been passed to statutory services, indicating a safeguarding risk or a criminal offence.

Recording protects both you and the person visited.

What to record?

Recording requirements vary with the level of vulnerability of the person being visited, the nature of the follow up and the content of the conversation.

Sometimes notes of telephone calls and written correspondence may be relevant where they are of particular significance or cover the type of discussion that would ordinarily be part of a pastoral visit.

For all pastoral visits you should record the following basic information:

- Name of person visited;
- Date and venue of visit;
- Reason for the visit;
- Any action to be taken following the visit including date of next visit;
- If information is to be passed on, whether the member is aware and has given consent;
- Further information - an additional section of the record could include observations on behaviour, statements made or information shared.

For more significant contacts (where the content forms more than general greetings and conversation) a template Contact Record can be found in Appendix 1.

It is important to note that a member can request to see their records as part of a Data Subject Access Request.

Where to record?

Information can be recorded either electronically or as a paper record.

1. If keeping paper records, there should be a separate record for each person visited. Paper records should be kept in a locked container.
2. Records kept electronically should be password protected.

Retention of records

Records of significant contacts should be passed on to the minister or pastoral secretary as soon as possible. Once this is completed, you should destroy or delete your records.

Data security

All of the pastoral records you make must be retained with due regard to security. The following key points should be followed:

1. When data is passed on to the pastoral secretary or minister, information (including personal data and details of safeguarding concerns) must be destroyed or permanently deleted. This also applies when you cease to carry out pastoral contact with an individual or cease the role itself.
2. Passwords should be used so that no one can access any record or personal data on a shared computer.
3. Any computer used for the retention of notes on pastoral visits should be encrypted and subject to regular virus and malware checking.

4. When information containing personal data is sent electronically, the document should be password protected and the password shared with the recipient by a separate means (eg.by text if the document has been sent by email).
5. Personal data about pastoral contacts should not be sent by email to shared inboxes.
6. Care should be taken when using shared or remote printers. Personal data should only be printed off when the person printing can ensure that no one else views or takes the document.
7. Hard copy documents should be secured in a locked container and should not be left on desks, in vehicles in public view or where family members can see them.
8. Hard copy material that is no longer needed should be shredded using a machine with cross shredding facility or passed on to the pastoral secretary or minister to shred.

Information on the Data Security Policy can be found in Appendix 3.

Note from the District Safeguarding Officer

Hello!

Thank you for reading this guide.

Further help and support is widely available if you would like to know more or require clarification:



Church level – the name and contact number of your Church Safeguarding Officer is below. They should be your specific contact person if you have any questions about safeguarding at a local level.

Circuit level – the name and number of the Circuit Safeguarding Officer is also below. They provide support and oversight for local churches and implementing safeguarding and ensure that activities with children and adults, both within the circuit and local churches, are provided according to good practice and safeguarding procedures.

District level – I am responsible for advising and following through safeguarding concerns anywhere within the district.

If you have any questions or concerns please give me a call on 07483 362 735 or email me at safeguarding@sheffieldmethodist.org.uk.

Alison Hill
12.8.2021

Important telephone numbers

Local agencies

Police (all non-emergency enquiries)	101
Local council Adults' Services/Social Care	

Support and Advice Organisations

Mind (mental health)	0300 123 3393
Action on Addiction (all kinds)	0300 330 0659
Age UK	0800 678 1602
National Domestic Abuse Helpline	0808 2000 247
National Debtline	0808 808 4000

Telephone Numbers for Staff

District Contacts

District Safeguarding Officer	Alison Hill 07483 362 735
LN Regional Coordinator (Training)	Rachel McCallam 07799 900478

Church and circuit contacts (please write in your local numbers):

Name	Role	Phone
	Superintendent Minister	
	Minister	
	Circuit Safeguarding Officer (Adults)	
	Church Safeguarding Officer (Adults)	

Additional support for you can be found on the Methodist Church website at www.methodist.org.uk/for-churches/guidance-for-churches/pastoral-care

Latest Standing Orders

The *Pastoral Care Guidance* contains both Standing Orders (SO) and guidance from *The Constitutional Practice and Discipline of the Methodist Church (CPD)* with particular reference to Vol. 2, Book VII, Part 14 *Guidelines for Good Practice in Confidentiality and Pastoral Care*

CPD is updated every year and so it is important to check the most up-to-date Standing Orders by viewing or downloading the most recent edition at www.methodist.org.uk/cpd

Safeguarding

The *Safeguarding Policy, Procedures and Guidance for the Methodist Church* can be found at

www.methodist.org.uk/for-ministers-and-office-holders/safeguarding/policies-procedure-and-information/policies-and-guidance/

Acknowledgements

This document draws on the work done by district safeguarding officers in Lincolnshire, Manchester & Stockport and Sheffield, following consultation with pastoral visitors and pastoral secretaries.

Please note that throughout this document:

- *minister is used to include presbyter, deacon, probationer or whoever has pastoral charge of the church.*
- *member may also include those who have a close and ongoing relationship with the church.*

Appendix 2

Pastoral Visitor Concern Report

(Where information is unknown the relevant box should be marked U/K and where unavailable N/A.)

Name of Church/Circuit/District	
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Person who is the subject of concern/at risk of harm/in need of support	
Name	
Contact details	
Adult/Child Please provide details of any factors indicating vulnerability.	Date of birth (or approximate age)

Parent/Guardian/Carer	
Name:	
Contact details:	
In the same household as person at risk?	Yes/No

Other relevant party (e.g. party causing concern)		
Name		
Contact details		
Role in the Church /connection to member		
Any additional roles involving children or vulnerable adults inside or outside the Church?	Yes/No Please list role and organisation.	Date of birth (or approximate age if unknown)
Nature of concern Please include the following details: <ul style="list-style-type: none"> • When this concern came to light • How did it come to the attention of the pastoral visitor • Who provided this information • Factual details to clarify the type of concern and the seriousness of the situation. 		

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Pastoral Visitor	
Name	
Contact details	
Position	
Signature	
Date of report	

Who has the pastoral visitor told about this concern?			
Name	Role	Date of contact	Contact details

Appendix 3

Data Protection

Everyone involved in pastoral care – the visitor, the church, the church members or those with a close and ongoing relationship with the church – needs to know the circumstances under which their information will be collected and processed.

As part of this a privacy notice (or electronic link to an online version) should be provided to all those receiving contact from a pastoral visitor. This will explain how data about them will be recorded, held and shared. By providing information from the beginning of the pastoral relationship, expectations are clearly laid out to form a strong foundation of trust and understanding.

The following ‘Fair Processing Statement’ (FPS) is a suggested form of words to use to tell people where to find the privacy information required under the General Data Protection Regulation (GDPR).

“*[Name of Church]* cares about your privacy and your trust is important to us.

Our Privacy Notice explains how local churches, circuits and districts, within the Methodist Church in Great Britain, collect, use and protect your personal information. It also provides information about your rights (Privacy Notice paragraph 9) and who to contact (Privacy Notice paragraph 1) if you have any questions about how we use your information.

You can find our Privacy Notice online www.tmc.org.uk/about/data-protection/managing-trustees-privacy-notice or displayed (*Insert location of hardcopy version e.g. on the noticeboard in the hall*).

(Name of local contact for questions about the privacy notice) will try to deal with any questions as a local point of contact.”

If this information is shared by phone or in person, the wording above should be adapted, making it clear where the individual can find the Privacy Notice and offering to send them a hard copy or a link to a PDF version by email.

The church is not required to have signed consent to collect and process pastoral visiting data, as collecting this information is necessary for the legitimate interests of the church (for supporting members and local communities), *unless* that data is shared with someone outside the pastoral care team.

The **Data Security Policy** can be found at <https://www.tmc.org.uk/about/data-protection/resources/trustee-documents/data-security-policy>.

This document is in the protected area of the TMCP website. Please contact TMCP to request the password – dataprotection@tmc.org.uk

Appendix 4

