

Acknowledgements

This document draws on the work of District Safeguarding Officers in Lincolnshire, Manchester & Stockport and Sheffield, following consultation with pastoral visitors and pastoral secretaries.

Pastoral Care Guidance

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Pastoral Visitor Guidance

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

To be a Christian is to be caring - for God's creation, for everyone a Christian meets, and for every group or organisation with which they connect. Among the people of God there are then certain people called to exercise this ministry in a more focused manner including pastoral visitors.

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

Safeguarding

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

<https://www.methodist.org.uk/safeguarding/policies-procedure-and-information/policies-and-guidance/>

Justice, Dignity and Solidarity

Each person is different. The *Strategy for Justice, Dignity and Solidarity*, which outlines the Methodist approach to equality, diversity and inclusion work can be found at

<https://www.methodist.org.uk/about-us/the-methodist-church/the-inclusive-methodist-church/>

Our Calling

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).

(Our Calling Conference Report 2000)

Our Calling will form a foundation for all that pastoral visitors do in, and on behalf of, the local church.

The care of members of the church, listening to and building relationships with them, is an essential aspect of the role of a pastoral visitor; a role that is key as the church lives out Our Calling. In many places pastoral visitors also care for those who have close and ongoing relationships with the church even if they are not members. Care needs to be taken about the different cultural expectations which people may have, according to their background and experience.

Latest Standing Orders

The Pastoral Care Guidance needs to be read in the light of Methodist Standing Orders (SO) and guidance from *The Constitutional Practice and Discipline of the Methodist Church (CPD)*. Particular attention should be given to the *Guidelines for Good Practice in Confidentiality and Pastoral Care* which can be found in Vol. 2, Book VII, Part 14.

Where possible the relevant Standing Orders have been included in this guidance, but *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 <https://www.methodist.org.uk/for-churches/governance/cpd/>

Who is visited?

The Church Council shall establish a community roll or card-index system in which the names of all those who are within the pastoral care of the Local Church shall be recorded. This shall include baptized children, children in family church or Sunday school and adolescent or adult adherents as well as members. (SO 54, 7)

In this document 'members' is used as a general term to include everyone on the community roll.

The Role of the Pastoral Visitor

'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 their 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, encouraging them in their discipleship 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 duties of a pastoral visitor are (SO 631);

- to exercise pastoral care over those committed to their charge;
- to visit those on their 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 their pastoral list.

These responsibilities may be undertaken in a variety of ways with differing levels of contact and support provided. Pastoral visitors need to be aware of different cultural expectations around pastoral support; enquiries are welcome to:

equality&diversity@methodistchurch.org.uk

When 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.

Safeguarding training

All pastoral visitors will need to complete the *Creating Safer Space: Foundation Module* 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.

Equality, Diversity and Inclusion (EDI) training

As each person has their own identity and our differences make us unique and precious to God it is vital that we reflect this, as best we can, in our pastoral care.

Paid pastoral workers are required, and all pastoral visitors are encouraged, to complete the Unconscious Bias training and the EDI training, found here:

<https://www.methodist.org.uk/about-us/the-methodist-church/the-inclusive-methodist-church/training-for-justice-dignity-and-solidarity/mandatory-edi-training-equality-diversity-and-inclusion/>

Safer Recruitment

Before you begin the role of a pastoral visitor, 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 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 Schedule 1 of the Children and Young Persons Act 1933, 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 and further information can be obtained from the District Safeguarding Officer (DSO).

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.

The Methodist Church has a clear policy regarding confidentiality. *With Integrity and Skill* 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 <https://www.methodist.org.uk/for-churches/guidance-for-churches/pastoral-care/confidentiality-guidelines/>

Privacy Notice

Everyone involved in pastoral care – the visitor, the church, the church members and those with a close and ongoing relationship with the church – needs to have confidence in the extent of confidentiality required and to know when information should be shared.

As part of this you will need to provide an electronic link to the Methodist Church's privacy notice to all those you have a pastoral contact with, or provide a paper copy for those without access to the internet. (See Appendix 3).

The Privacy Notice explains how data about them is 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, or anyone receiving formal pastoral care, should expect that any information they share with you will not be passed to others unless one of the following conditions is fulfilled.

- The member gives consent in advance for specific information to be shared. This, for example, might be a request for intercessions or spiritual guidance.
- The information disclosed by the member 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 the pastoral visitor believes that another party is involved or is likely to become involved in a significant criminal offence. In this instance the matter should be discussed with the minister or safeguarding officer as soon as possible. If this is an emergency situation the police or social services should be contacted immediately.

It should never be assumed that family members, friends, ministers, lay leaders or other parties are aware of a situation without confirming this first with the person receiving pastoral care. 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 6.3.1*.

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 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 as soon as possible afterwards. (Appendix 5)

Confidentiality and technology

As a pastoral visitor you may be using technology to contact people, 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, X (formerly Twitter), Instagram etc. 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.

Good Practice

Conflicts of interest

As a pastoral visitor you may find there is a conflict of interest when visiting certain 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 with others 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 to have different pastoral visitors where 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 minister, or person appointed by the Church Council to have some responsibility for pastoral visitors.

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 mentioned 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, local lay pastor, or person appointed by the Church Council to have some responsibility for pastoral visitors
- 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. It is suggested that a pastoral visitors' gathering 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 a pastoral visitor you will meet at least once a year as part of the Pastoral Committee (SO 644). The pastoral visitors and class leaders, with the church stewards and the minister in pastoral charge of the local church, constitute the Pastoral Committee.

Support from the Church Council

Some Church Councils appoint someone to have specific responsibility for the work of all pastoral visitors in the church, including equipping and developing you as a team. A key part of their role may be providing support and accountability for every pastoral visitor or arranging someone to provide this.

The Church Council will make it clear who your first point of contact is 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. This can be particularly beneficial 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, 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 occasions when it is better for more than one pastoral visitor to visit. Although rare, these situations should be discussed with the minister or the person appointed by the Church Council, 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 being visited.

What to record?

Recording requirements will vary depending on the vulnerability of the person being visited, the nature of the follow up required and the content of the conversation.

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 person is aware and has given consent.

- Further information - an additional section of the record could include observations or information shared.

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

It is important to note that anyone 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.

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

Retention of records

Records of significant contacts should be passed on to the minister or other person appointed by the Church Council 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:

- When data has been passed on to the minister or other person appointed by the Church Council, the information you hold (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.
- Passwords should be used so that no one can access any record or personal data on a shared computer.
- Any computer used for the retention of notes on pastoral visits should be encrypted and subject to regular virus and malware checking.
- 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 (e.g. by text if the document has been sent by email).
- Personal data about pastoral contacts should not be sent by email to shared inboxes.

- Care should be taken when using shared or remote printers. Personal data should only be printed off when no one else can view or take the document.
- 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.
- Hard copy material that is no longer needed should be shredded using a machine with cross shredding facility or passed on to the minister or other person appointed by the Church Council to shred.

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

Appendix 1

Pastoral Visitor Contact Record

This template may be helpful in recording **significant contacts** by those offering support.

A significant contact is where it goes beyond basic greetings or arrangements for church activities. This could include discussion of personal circumstances, welfare or support considerations.

Name of pastoral visitor	
Church name	

Name of person visited	
Date of visit	
Venue	
Reason for the visit	
Necessary action, if any, and who it involves	
Date of next visit	

Further Information <i>This may include information provided by the person being contacted/visited about themselves or others which is relevant to their wellbeing or engagement with the Church or any relevant information about their circumstances discussed during the contact.</i>
Is the person aware of any actions proposed? Yes/No
Have they given their consent for this action? Yes/No

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:

- 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	
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Contact details	
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Position	
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Signature	
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Date of report	
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Who has the pastoral visitor told about this concern?			
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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 have confidence in the extent of confidentiality required and to know when information should be shared.

As part of this a privacy notice (or an 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.

*The Privacy Notice can be found on the Methodist Church's website at <https://www.methodist.org.uk/privacy-notice/> A copy should also be 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.

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.tmcpc.org.uk/about/data-protection/resources/trustee-documents/data-security-policy>

Appendix 4

