

Safeguarding and Pastoral Care



**This Guidance is for ministers
and anyone who has a leadership role in pastoral care
within the Methodist Church**

August 2024

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.

Safeguarding and Pastoral Care

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Pastoral Visitor Guidance

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

This document is for ministers, all members of the Church Council and anyone who has a leadership role in the church's ministry of pastoral care. *Safeguarding and Pastoral Care* supports *Pastoral Care Guidance* for pastoral visitors.

Pastoral care is understood and expressed in different ways in different places and is always the responsibility of the Church Council. As such pastoral care should be discussed regularly and reviewed in Church Councils. This document provides the basis for these discussions, particularly in relation to safeguarding and pastoral care.

These discussions should always be rooted in the Methodist Standing Orders and the Methodist Safeguarding policies and procedures.

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/>

Latest Standing Orders

Safeguarding and Pastoral Care 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

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 pastoral visitor's role is the care of members of the church, listening to and building relationships with them; 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.

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. Pastoral visits and other forms of contact can provide reassurance and comfort at times of need and a pastoral visitor can support a person's discipleship by listening, offering to pray and discussing issues of concern.

Acting on behalf of the church the pastoral visitor works as part of a wider team, is accountable to the Church Council and has a responsibility to report any concerns.

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

Commissioning.

The Methodist Worship Book contains the outline for a commissioning service which acknowledges the importance of the pastoral visitor role. Churches may hold this service annually to commission new pastoral visitors and to recommission continuing pastoral visitors.

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.

Unconscious Bias and EDI (Equality, Diversity and Inclusion) 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.

This training is required for paid Lay Workers but it is hoped that many (if not most or all) Pastoral Visitors will, at some point, complete the Unconscious Bias training and the EDI training which can be 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/>

This is because all people are so different and we need to be aware of the ways in which our own prejudices may prevent us valuing the richness of the diversity of humankind, each person made in the image of God.

Safer Recruitment

Before a pastoral visitor begins their role the Church Council must follow the appropriate safer recruitment process in line with *Practice Guidance for DBS Checks (as part of Safer Recruitment)*. www.methodist.org.uk/safeguarding/policies-procedure-and-information/policies-and-guidance

Prior to recruitment, the Church Council will agree a role outline, and this will be discussed with the prospective pastoral visitor. Two sample role outlines have been provided which can be amended to fit local circumstances (Appendix 1).

The sample role outlines cover the two different levels of pastoral visitor contact.

Pastoral visitors – social contact

Pastoral visitors – social contact and additional support

Ideally most pastoral visitors will be appointed to the second role outline, as this will cover situations they are likely to encounter. Also included is a role outline for anyone, appointed on behalf of the Church Council, to support the work of pastoral visitors.

Pastoral visitors should be interviewed for the role (however informally), and have references taken up. It is important that the pastoral visitor knows who they are accountable to and their duty to report any safeguarding concerns.

When does a pastoral visitor need a DBS check?

The requirement for a DBS certificate will depend on the activities undertaken by the pastoral visitor. Each of the role outlines details the level of DBS needed (Appendix 1).

In some cases, additional activities will mean a barred check is requested. If carrying out a barred check it is important to specify if this relates to children or vulnerable adults or both groups.

For an overview of the documentation to support safer recruitment see Appendix 6, Forms and Documents

Restrictions to Appointment

The restrictions of appointment (SO 010(2) (ii)) apply to the role of pastoral visitor. 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.

Confidentiality

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 ongoing relationship with the church – needs to have confidence in the extent of confidentiality required and to know when information will need to be shared.

As part of this, an electronic link to the Methodist Church's Privacy Notice (<https://www.methodist.org.uk/privacy-notice/>) should be given to all those receiving contact from a pastoral visitor (Appendix 4). This will explain how data about them will be recorded, held and shared.

The Privacy Notice explains how data about them is recorded, held and shared. By providing this information at the start of a pastoral relationship, expectations are clear and a foundation of trust established.

Confidential information

A member, a minister and anyone receiving formal pastoral care, should expect that any information shared during a pastoral contact 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. 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, support will be provided by the church, circuit or district safeguarding officer to make a referral to the appropriate statutory services.

The adult disclosing the concern should be supported in sharing this with the relevant agencies, or they should be encouraged to give consent for the information to be passed on. If an adult has mental capacity, they must consent before a referral can be made; 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*)

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

If a pastoral visitor considers a person is under duress a referral can be made on their behalf. In this situation the safeguarding officer will provide support in making both the decision and the referral.

In the following circumstances a referral can be made, without informing the person disclosing in advance.

- 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

A pastoral visitor may use technology to make contact, to follow up, to pass on information or to store records of visits. When using technology in pastoral care 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.
- 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

A pastoral visitor 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 a pastoral visitor does visit a friend, both need to be clear on the different expectations and the need for the pastoral visitor to share information with others if there is a serious concern.

A conflict of interest may also arise if a pastoral visitor is connected to 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.

Any pastoral visitor who feels they have a conflict of interest should discuss this with the person appointed by the Church Council or the minister.

Good practice in visiting

Before a visit the pastoral visitor should contact the person to arrange a convenient time, date and venue, being sensitive to what is an appropriate length of visit.

After the visit the pastoral visitor must remember that anything talked about should not be shared with friends or family or mentioned in public prayer without permission.

Visiting in hospitals and care settings.

Where visits take place in a hospital or care setting, pastoral visitors should report concerns, arising from the standard of care, to the church safeguarding officer. The safeguarding officer will then ensure that the issue is raised via the provider's reporting system, the local authority and/or the Care Quality Commission, as appropriate. The District Safeguarding Officer can provide support in these circumstances.

Further information is available *Safeguarding Policy, Procedures and Guidance of the Methodist Church, Sections 4 & 6*

Support for Pastoral Visitors

Local churches should put in place an effective support structure for pastoral visitors.

Support may include:

- regular meeting of pastoral visitors in the church or circuit
- contact with the minister 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.

Pastoral visitors will meet at least once a year as part of the Pastoral Committee (SO 644). This may also be the place in which the support outlined above is offered.

Support from the Church Council

The oversight of pastoral visitors always rests with the Church Council. In some churches, Church Councils will appoint someone to have specific responsibility for the work of all pastoral visitors in the church, including equipping and developing them 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 to all pastoral visitors, who their first point of contact is if they feel unable to continue with their role or need further assistance to do so.

Buddy system

A buddy system allows 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, a pastoral visitor should be encouraged to think about their 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
- if a complaint is made, there is a record of what support has been offered and the times the pastoral visitor was 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 the person visited and the pastoral visitor.

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 the following basic information should be recorded.

- 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.

Alongside recording visits, notes of telephone calls, online interactions and written correspondence may be recorded when they are of particular significance.

For more significant contacts (where the content forms more than general conversation) a template Contact Record can be found in Appendix 2.

It is important for pastoral visitors 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

The pastoral visitor should keep the records or information they need to follow up conversations and actions following a visit. Once these have been completed the records of significant contacts should be passed on to the minister or person appointed by the Church Council, as appropriate. The pastoral visitor should then destroy or delete their records.

It is important for the minister or person appointed by the Church Council to keep a record of where individual notes are stored in line with archiving policies. Pastoral records about a person should be kept if they have an ongoing relationship with the church but only kept with their consent when that relationship has ceased.

Records of safeguarding concerns, however will be retained for 75 years, in line with the *Safeguarding Policy, Procedures and Guidance for the Methodist Church, Appendix 4*.

Data security

All records made by a pastoral visitor must be retained with due regard to security. The following key points should be followed:

- When data is passed on to the person appointed by the Church Council or minister, information held by the pastoral visitor must be destroyed or permanently deleted. This also applies when a pastoral visitor ceases to carry out pastoral contact with an individual or ceases 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 4.

Appendix 1

Sample Role Outline 1

Pastoral Visitor – social contact

Contact which does not go beyond basic greetings and arrangements for church activities.

This pastoral visitor will engage in social conversations, enquire about the person's general health and well-being and keep them in touch with church life. They will not be expected to become involved in day to day affairs or more personal matters.

If the pastoral visitor is visiting the individual as a friend and not as their pastoral visitor, they should make this clear at the outset.

Activities

The following tasks (some as outlined in SO 631(2)) may be undertaken as part of this role:

- visiting occasionally for social conversation and to help reduce someone's feeling of isolation.
- acting as a listening ear for any matters of a personal or spiritual nature.
- passing information to someone who may not be able to attend church activities.
- delivering a newsletter, church notices or membership card.
- discussing someone's general health and well-being and reporting to the pastoral secretary or minister any concerns.
- offering prayer if required.
- sharing pastoral concerns with the minister or pastoral secretary.
- notifying safeguarding issues to the safeguarding officer or minister.

This role will **not** provide personal care for adults or children; have unsupervised contact with children; assist with financial issues including banking and shopping or drive the member to medical or social care appointments on behalf of the church.

Safeguarding and Support

This role does not require an enhanced DBS check but a decision to apply for a basic DBS may be made locally.

If the role of the visitor and the needs of the member change and develop into more involved contact the pastoral secretary must be consulted and a DBS check considered.

All pastoral visitors should complete the Creating Safer Space: Foundation Module, which is refreshed every 4 years.

This pastoral visitor will report to the Church Council via the minister or a person appointed by the Church Council.

The church takes the safety of everyone within the church very seriously and expects that everyone will work within the church safeguarding policy. In particular, the church expects anyone who becomes aware of a safeguarding risk or of actual abuse, to immediately raise this with the safeguarding officer or the minister.

Sample Role Outline 2 Pastoral Visitor – social contact and additional support

This may include significant contact which goes beyond basic greetings and arrangements for church activities. It could include discussion of personal circumstances, welfare or support considerations.

This pastoral visitor will engage in social conversations, enquire about the member's general health and well-being and keep them in touch with church life.

In some cases pastoral visitors may need to assist in more involved support with someone, given the person's circumstances and requests for help. This should be agreed with the minister or person appointed by the Church Council.

If the pastoral visitor is visiting the individual as a friend and not as their pastoral visitor, they should make this clear at the outset.

Activities

The following tasks may be undertaken as part of this role:

- visiting more frequently than Role 1 and actively offering opportunity for discussion about life events, current issues and concerns.
- supporting someone with a particular task (not personal care or personal affairs) for example signposting to appropriate services or requesting spiritual support from the minister.
- enquiring about a person's general health and well-being to be sure a person is not vulnerable.
- offering prayer if required.
- sharing pastoral concerns with the minister or person appointed by the Church Council.
- notifying safeguarding issues to the safeguarding officer or minister.

This role will **not** provide personal care for adults or children; have unsupervised contact with children; assist with financial issues including banking and shopping or drive the member to medical or social care appointments on behalf of the church.

Safeguarding and Support

This role requires an enhanced DBS check.

All pastoral visitors should complete the Creating Safer Space: Foundation Module, which is refreshed every 4 years.

This pastoral visitor will report to the minister or person appointed by the Church Council.

The Church takes the safety of everyone within the church very seriously and expects that everyone will work within the church safeguarding policy. In particular, the Church expects anyone who becomes aware of a safeguarding risk or of actual abuse, to immediately raise this with the safeguarding officer or the minister.

Additional Tasks which may impact the level of DBS

In some circumstances the pastoral visitor may

- have more direct contact with children
- assist with financial matters such as banking, bill paying or shopping.
- drive to medical or social care appointments on behalf of the church.
- act as a representative of an individual as required and with permission.

Such a role should only be undertaken with the agreement of the Church Council through the minister or person appointed by the Church Council and should be in consultation with the Circuit and District Safeguarding Officer. Consideration, in these circumstances, should be given to visiting in pairs and detailed recording of all visits.

Safeguarding and Support

If any of these additions are made to a role, they will require an enhanced DBS check with barred list check for the groups visited (adult, child or both)

Suggested Role Outline

Those supporting pastoral visitors as appointed by the Church Council.

(For example a pastoral secretary / lay employee / local lay-pastor)

Note that these activities may be carried out by more than one person, for example some tasks may fall to the safeguarding officer.

Activities

The following tasks may be undertaken as part of this role:

- offering help and support to pastoral visitors where possible and appropriate.
- acting as a central point for information regarding pastoral concerns relating to members.
- ensuring pastoral visitors are appropriately recruited, DBS checked if required and offered support and induction.
- handing out membership tickets when provided by and on behalf of the minister.
- maintaining the lists of who is being supported by which pastoral visitor.
- reviewing the list to ensure suitability of matching pastoral visitors and members.
- organising and convening pastoral visitor meetings.
- sharing pastoral concerns with the minister.
- receiving safeguarding concerns and passing them to the safeguarding officer or minister.
- identifying, through a team approach, any training or development needs.

Safeguarding and Support

This role requires an enhanced DBS check.

Those supporting pastoral visitors should complete the Creating Safer Space: Foundation Module, which is refreshed every 4 years.

This role will report to the Church Council.

The Church takes the safety of everyone within the church very seriously and expects that everyone will work within the church safeguarding policy. In particular, the Church expects anyone who becomes aware of a safeguarding risk or of actual abuse, to immediately raise this with the safeguarding officer or the minister.

Appendix 2

Pastoral Visitor Contact Record

This template may be helpful in recording *significant contacts* by those offering support in Role Outline 2.

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 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.
Is the person aware of any actions proposed? Yes/No
Have they given their consent for this action? Yes/No

Appendix 3

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	
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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 4

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. (See also Appendix 6 - Forms and Documents) 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 clear and a foundation of trust established.

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."

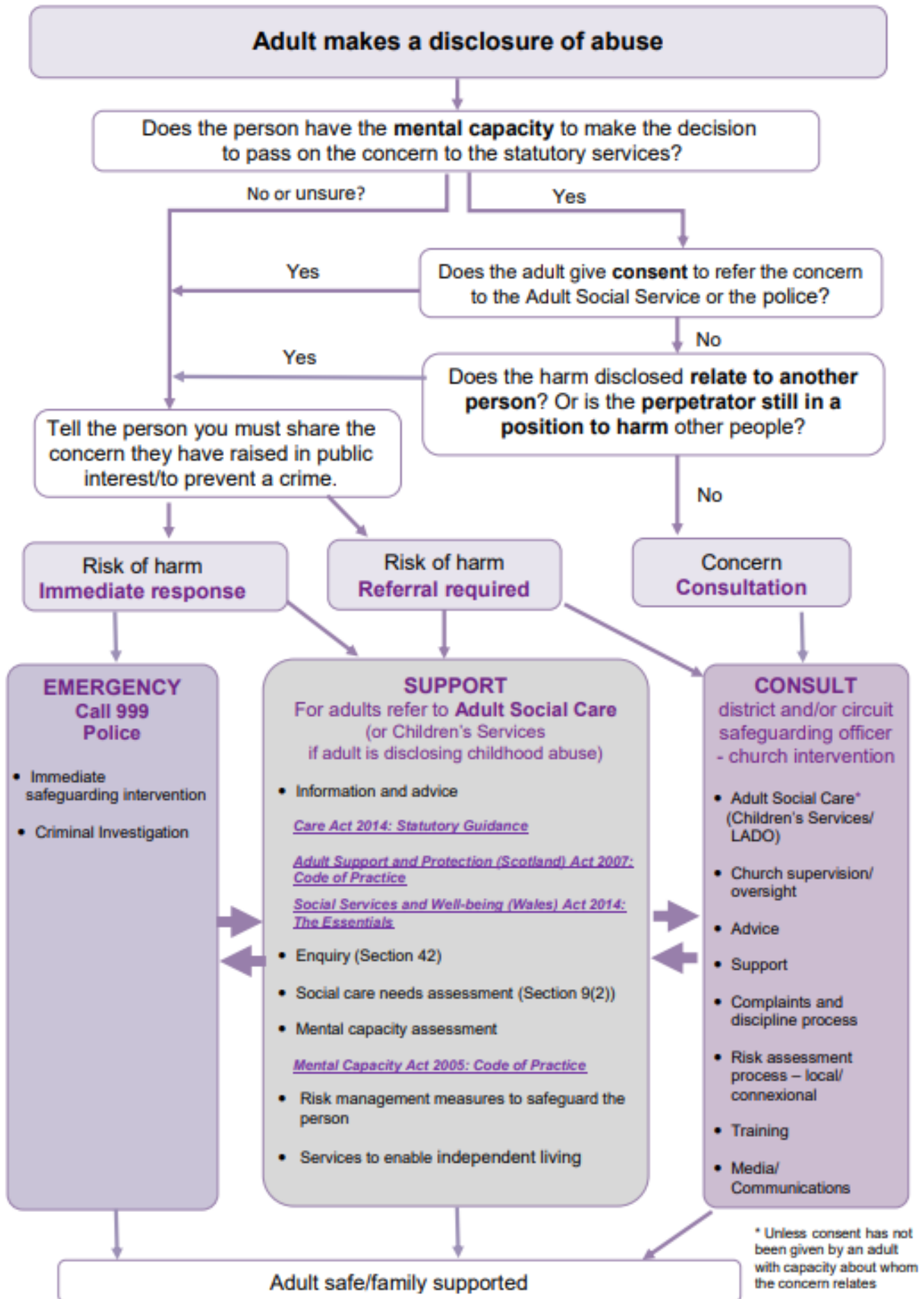
If this information is shared by 'phone or in person, the wording above should be adapted, making it clear where the individual can find the Privacy Notice.

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 5



Appendix 6

Forms and Documents: what to complete

Applicable Group	Document	Copied to	Reason
Members When a new pastoral visitor is allocated	Privacy notice	Note to be retained by pastoral secretary or minister of the date this was done.	To ensure that members who receive pastoral contact understand their data rights and when information may need to be shared with other parties. <i>A link to the Church's privacy notice should be supplied.</i>
Newly recruited pastoral visitors (Role Outline 1)	Privacy notice	Note to be retained by pastoral secretary or minister of the date supplied.	To ensure that pastoral visitors are aware of the data that will be retained. <i>A link to the Church's privacy notice should be supplied.</i>
	Role outline	Pastoral secretary or minister to retain a copy.	To ensure that there is an agreed role outline which specifies what activities will be undertaken. <i>This may be copied from the template included in this guidance with appropriate amendments to suit local circumstances.</i>
Newly recruited pastoral visitors (Role Outline 2)	Form A Part 1 Registration (including privacy notice)	Retained by pastoral secretary or minister	To facilitate safer recruitment, provide contact details and data protection rights. Volunteer should keep pastoral secretary or minister in pastoral charge up-to-date with significant changes in circumstances.
	Form A Part 2 (including role outline)	Retained by pastoral secretary or minister	To ensure all parties understand expectations of role to be undertaken. Reviewed annually. <i>This may be copied from the template included in this guidance with appropriate amendments to suit local circumstances.</i>
	Confidential safeguarding declaration	Retained by pastoral secretary or minister	Prior to completing DBS check and on renewal. To allow the applicant the opportunity to raise issues that may arise on a DBS check.
	DBS check	Application via DDC	To support safer recruitment. Renewal every 5 years.