

Anna Chaplaincy Policy

(Includes Guidance for Befrienders who are visiting or telephoning)

Version No	Date	Details of changes included in update	Amendments by name and role
Original	February 2022	The Trustees of The Meeting Place (TMP) approved this Policy April 2022	Written by Elaine Crutchley Anne Milton-Worsell
Version 1	January 2024	Reviewed and provisionally re-approved pending review by Anna Chaplain	Elaine Crutchley/Margaret Hibbert TMP Trustees
Version 2	June 2025	Updating the process and documentation required for referrals to the Chaplaincy	Elaine Crutchley / Liz Tapp
Version 3	September 2025	Update to include Lone Working Procedure as Appendix 2	Elaine Crutchley and Margaret Hibbert

Policy Statement

The aim of this Policy and the associated working forms is to ensure that the work of the Anna Chaplaincy is safe and follows good practice. It is for the protection of both those we visit and ourselves. It will encourage us to think about basic risk assessment, about who, where and why we are meeting, and whether it needs to be a one to one encounter. This policy applies to the Anna Chaplain and Anna Friends.

The policy ensures that there is appropriate record keeping and that our records are held in a GDPR (General Data Protection Regulations) approved manner. Good records are important to our work both in the immediate context as well as meeting future need for information. Recording is essential when there is lone working.

Group visits and events are subject to risk assessments of the places in which they are being held. Safeguarding is an essential underpinning of all we do. The Anna Chaplain and all Anna Friends and Volunteers who are involved with befriending, or spiritual support will be DBS checked and provided with appropriate safeguarding training. Volunteers who help in occasional group events may be exempt from DBS checks.

Procedures for referrals and interventions

(Referral forms are appended at Appendix 1)

1. Introduction

- The Befriending Service is the only activity offered by TMP that necessitates lone working.
- Lone working is defined by the Health & Safety Executive (HSE) as people who work by themselves without close or direct supervision. This does not necessarily mean that the worker is physically alone; it means they are in a separate location to the rest of their team or manager.
- Risks associated with lone working are related to working in the home of the person referred. The majority of people will welcome Anna Friends into their homes, however, there may be situations which are difficult to manage if the volunteer is on their own. This is usually related to the mental state of the person being visited or to that of a family carer. Such situations include :-
- Accusations of theft
- Accusations of inappropriate physical contact
- Physical aggression
- Emotional bullying or coercion e.g. being expected to do something with which the volunteer is not comfortable.
- The following procedures must be followed to ensure that everyone involved in befriending is kept safe. If the visit is to a resident of a Care Home, the procedure of that Care Home must be followed.

2. Referrals

- **The referral information record – Form 1**
- Form 1 is the Referral Record Form and must be completed for all referrals. The referrer must have obtained the permission of the person for whom they are requesting befriending .
- The referral information forms will be kept securely on the Anna Chaplaincy computer. Each referral will be numbered sequentially so that anonymised data can be added to the spreadsheet which will allow us to develop reports on the service.
- If the referral is accepted the Anna Chaplain (AC) will contact the person who has been referred to arrange a visit. This visit aims to gather information about what we can offer, and to assess risk in the context of any vulnerabilities. T
- The AC will complete **the Office Referral record - Form 2**

3. Allocation of befriender

- On receipt of a referral the AC will consider whether she should request an Anna Friend (AF) to join her for the initial visit. If the AC visits the new referral on her own she will consider whether she will continue to visit the referred person or approach an AF to make regular visits.
- The Anna Chaplain will always ask an Anna Friend if he or she is willing to befriend someone who has been referred.
- Forms must be kept securely by the Anna Chaplain and any Anna Friend who is visiting those who have been referred.

4. Lone Working

Whenever there is lone working the visitor must inform a colleague or family member of their visit and report back when their visit is completed and they have left the house.

5. Recording of visits and / or telephone calls

- All telephone calls, visits and meetings where volunteers are on their own with one other person or with a couple, or family and carer must be recorded on the **Visitor Record Form (VRF)**.
- The VRF must be filled in **immediately after contact** (telephone, text, email or in person) has been made with someone who has been referred. Forms completed over a 2 month period must be sent / given to the Anna Chaplain at the next Anna Chaplaincy Working Group meeting.
- The AC will forward anonymised data relating to the service (number of visits, number of active referrals, closed referrals) to the Anna Coordinator, who is the Trustee on the TMP Board responsible for the Chaplaincy. This statistical data is essential for providing information for grant applications and future planning.

6. Safeguarding

- The VRF outlines the process to follow when a safeguarding issue is identified.
- Any safeguarding concern must be discussed with Elaine Crutchley who is the Designated Safeguarding Lead for The Meeting Place.
- The full Safeguarding Policy is available to all volunteers, and includes an incident reporting form. For ease of reference the flow chart for dealing with safeguarding concerns about adults at risk is included at **Appendix 2**. For all volunteers for TMP there is a duty to **“Recognise, Respond, Record, Report, Review”**. If an incident involves the Designated Safeguarding Lead it must be discussed with the current Chairperson of The Meeting Place.

7. Storage of data

All forms must be stored securely on the Anna Chaplain’s laptop. Anna Friends must ensure that the Summary of referral information and Visitor Record Forms are stored securely on their laptop. AFs **must delete any records on their laptop when the case is closed**. Electronic documents can be password protected.

8. At the end of involvement

- All endings must be discussed at the Anna Chaplaincy Working Group.
- Goodbye visits must be recorded as such, and it must be noted if further involvement is requested.
- If a formal befriending relationship becomes a personal friendship, then this formal involvement as a befriender will come to an end.
- All forms must be sent to the Anna Chaplain and any information held on home devices deleted.

Appendix 1

Form 1: Referral Record Form	Page 4 - 7
Form 2: Office Referral Record Form	Page 8
Form B: Visitor Record Form	Page 10



THE MEETING PLACE (BOOKHAM)

Form 1: Referral Form



To be used by the referrer or completed by the Anna Chaplain or Coordinator in discussion with the referrer.

Please note that the person being referred must agree to this referral. Please complete both pages.

Date	
Permission	<p>Please sign to acknowledge that permission to be referred has been given by the person being referred:</p> <p>Sign: Print name</p>
Referrer details	<p>Name:</p> <p>Organisation:</p> <p>Tel:</p> <p>Email:</p> <p>Address:</p>
Person being referred	<p>Name:</p> <p>DOB:</p> <p>Tel:</p> <p>Email:</p>

	Address:
Key info relating to person being referred	<p>Main reason for referral: Please tick all that apply</p> <ul style="list-style-type: none"> <input type="radio"/> Lonely <input type="radio"/> Housebound <input type="radio"/> Bereaved <input type="radio"/> Other (please provide further information) <p>.....</p> <hr/> <p><u>Important information</u></p> <p>Mobility issues:</p> <p>Memory issues:</p> <p>Communication issues:</p> <p>Parking / access issues:</p> <p>Pets:</p> <p>Smoker:</p> <p>Interests:</p> <p>Other:</p>
Relatives contact details	Name:

	<p>Relationship:</p> <p>Tel:</p> <p>Email:</p> <p>Address:</p> <p>Is the relative happy for the Anna Chaplain (or an Anna Friend volunteer) to make contact?</p>
<p>Carers contact details</p>	<p>Name:</p> <p>Tel:</p> <p>Email:</p> <p>Address:</p>
<p>GP name and contact details</p>	<p>Name:</p> <p>Tel:</p> <p>Email:</p> <p>Address:</p>

Please return this form to Liz Tapp, the Anna Chaplain

ac@themeetingplace.org.uk

or c/o Eastwick Road Church, Eastwick Road, Great Bookham, Leatherhead KT23 4BE

Form 2: Office use only

Referral number		
Date of initial visit		
Time of initial visit		
Initial visit made by		
Lone working?		
Info from initial visit		
Contact with relatives/carers		
Transport – If auth to speak with relative, what are their thoughts on transport e.g. to GY?		
Interventions	<p>Tel. Befriending:</p> <p>Befriending at home:</p> <p>Social Events:</p> <p>Spiritual support:</p> <p>Other:</p>	
Volunteer check list	<ol style="list-style-type: none"> 1. Name of volunteer: 2. Is able to use mode of transport? 3. Is car appropriately insured? 4. Can manage paths / steps / stairs? 5. Can gain entry & lock if necessary? 6. Has a mobile phone (or access to a landline)? 7. Has someone to inform if lone working? 8. Is comfortable with the setting / arrangements? 9. Is willing to assist with basic tasks e.g. making a drink? 10. Are you able to keep the referral forms confidential? 	

		Completed on
Follow up		
Follow up post referral form being sent to AF		



Form B: Anna Chaplaincy Visitor Record Form

(this form to be used for telephone befriending, visiting at home or meetings in public places)



Name of Befriender: CCM
covered: April-May

Period

Date	TC/ HV/ Other	How long was your contact?	Was it lone working? Y/N (If yes, who did you advise?)	Any issues, concerns or vulnerabilities identified? Y/N If yes, please fill in the next column and advise Liz or Elaine immediately	When did this occur?	Date:
						Time:
					What happened?	
					What actions were taken?	
					Who was informed?	
					Any ongoing vulnerabilities? If you are reporting a safeguarding incident, please use the specific form for this (Appendix 5 of TMP Safeguarding Policy)	

This form should be completed after every contact. Please send to the Anna Chaplain (ac@themeetingplace.org.uk) or Befriending Lead (annacoord@themeetingplace.org.uk) or have them available for feedback meetings.

Appendix 2: Lone Working Procedure

1.0 Introduction

The Meeting Place (TMP) understands that our volunteers and staff may be required to work in situations where they will be alone with a user of our service in their own home or in other premises. These procedures should be read in conjunction with the TMP Health and Safety Policy and Volunteer Policy, which outline the responsibilities of the trustees, the team leaders and the volunteers and staff themselves.

2.0 Who is a lone worker?

The definition of a lone worker is: *“Those who work by themselves without close or direct supervision”* (Health and Safety Executive).

3.0 Lone Working in TMP

Many of TMP activities are in the context of groups of people e.g. The Coffee Shop, The Community Fridge, the Language Hub and Lip Reading Classes.

Whenever there is a lone working situation the team leader is responsible for assessing risk. In the case of the Anna Chaplaincy lone working is a significant part of the Befriending Service. The Anna Chaplain and any Anna Friend designated to meet a new user of our service must undertake a lone working risk assessment, see Forms 1 and 2 in Appendix 1.

It is important in these situations to maintain appropriate physical, emotional, social, sexual and spiritual boundaries. Situations that may arise and involve lone working include:

- Conversations held with an individual in a separate room.
- Offering lifts: in general it is TMP policy not to offer lifts to individuals using our services. However, there are situations where this is necessary. In such cases volunteers should try to ensure there is another person with them in the car, or at the very least inform someone that they are offering a lift to a service user.
- The Anna Chaplain regularly works at Eastwick Road Church when there is no-one in the building. It is important that appropriate security measures are taken e.g.. locking the front door.

4.0 Risks associated with Lone Working

The vast majority of the people we will come into contact with as part of our work with TMP will welcome the volunteer /staff member into their home and will interact in a positive and appropriate manner. However, there are situations which may be difficult to manage if the worker is alone in the client's home. Often these are related to the client's mental state, or possibly those of a family member who is a carer. Examples include:

- accusations of theft
- accusations of inappropriate physical contact
- physical aggression
- emotional bullying or coercion e.g. being expected to do something which the worker is uncomfortable with.

5.0 Home visits

- Befriending Service referrals – information must be gathered from the referrer about any specific requests e.g. gender of befriender, and any risk factors. An initial visit will be made by the Anna Chaplain or designated Anna Friend to assess risk and vulnerability. Once a decision is made to accept the referral, Form 1 and 2 must be completed.
- Visitor Record Forms (VRF) are to be completed after every contact with the individual using our service.

6.0 Visits to Care Homes

It is important to follow the protocol set by the Care Home. Staff in the Care Home should always be informed of visits made by anyone from TMP.

7.0 Safe manual handling

TMP would want to encourage our clients to get out of their homes. If the situation arises as in Para 3.0 volunteers should only lift mobility devices if they have had appropriate manual handling training as listed in the Members Area of the TMP website.

Appendix 3: Safeguarding Adults at Risk Flow Chart

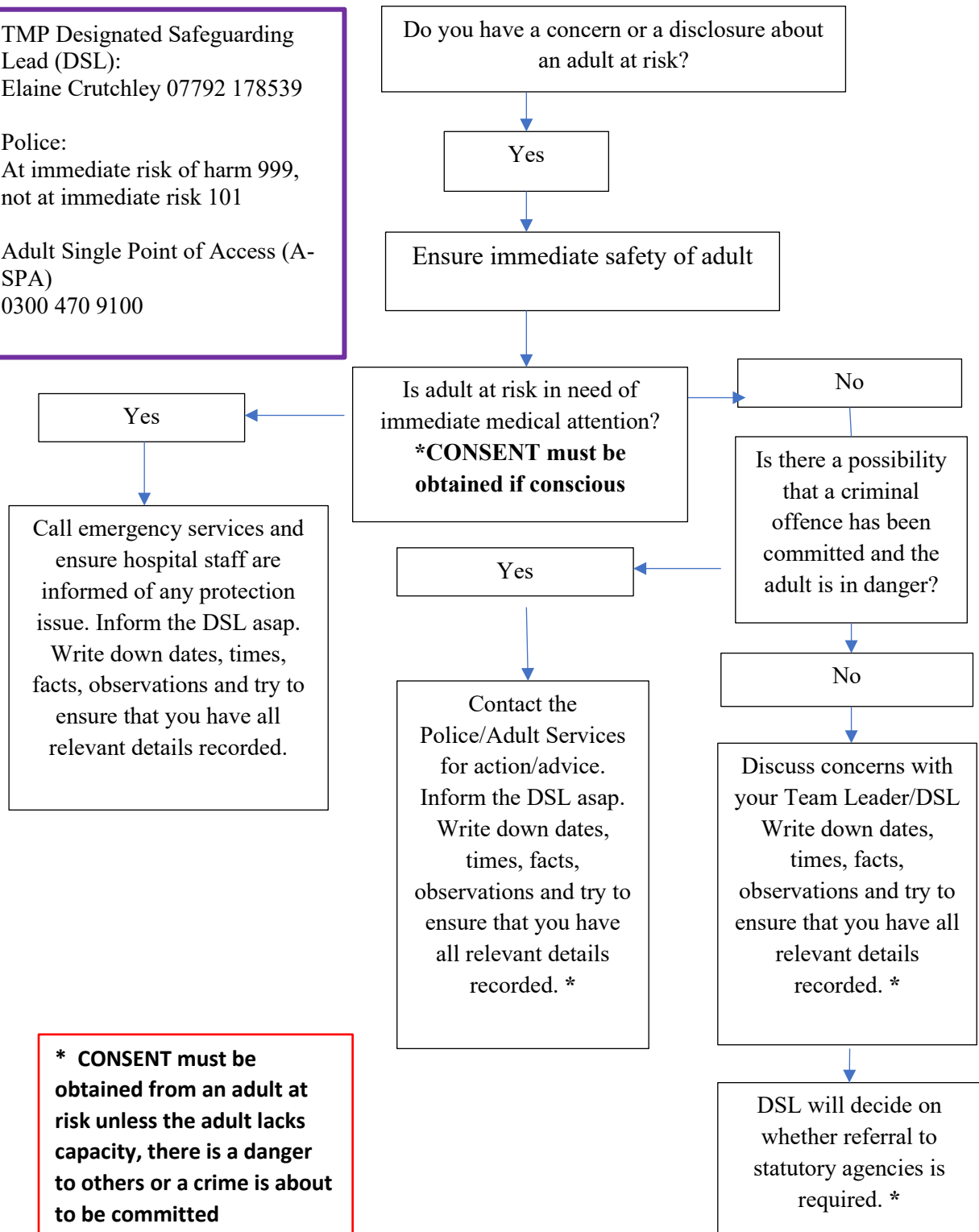
THE MEETING PLACE (BOOKHAM)
Responding to Disclosures or Suspicions of Abuse for Adults at Risk
 2023



TMP Designated Safeguarding Lead (DSL):
 Elaine Crutchley 07792 178539

Police:
 At immediate risk of harm 999,
 not at immediate risk 101

Adult Single Point of Access (A-SPA)
 0300 470 9100



*** CONSENT must be obtained from an adult at risk unless the adult lacks capacity, there is a danger to others or a crime is about to be committed**