The Befriending Code of Practice has been written by Martha Lester-Cribb (BNS Quality Officer) in collaboration with other BNS staff and in consultation with a representative sample of member organisations and other experts in the field of befriending.

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This document can be downloaded as a PDF file from the BNS website: www.befriending.co.uk. Please contact BNS for a printed copy or a large print version.

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How to Use this Document

Terminology
The Code of Practice uses the following naming conventions:

→ people who receive a befriending service = “clients”
→ volunteers who are matched with clients = “befrienders”
→ organisations which provide a befriending service = “projects”
→ supported relationships between individual befrienders and clients = “matches”
→ staff who run a befriending service = “Project Coordinators”

Some projects may use different words (eg “befriendee” instead of “client”). This may be particularly so in relation to staff job titles (eg in some projects the “Project Coordinator” is in fact a manager who does not work directly with clients). It should still be possible, however, to adapt the principles laid out in this Code of Practice appropriately for all befriending projects.

Links within the Electronic (PDF) Version
In the electronic version of the Code of Practice, all cross references to other sections of the document (ie the table of contents, the index, and all references within the text) are links which, when clicked on, will take the reader directly to the relevant heading. References to external websites can also be clicked on to open the appropriate site in an internet browser.

Symbols

S&CP  an essential minimum for Safe & Competent Practice

GP  an indication of Good Practice. Good Practice goes beyond the level required to ensure safety and competence by significantly enhancing the way the project is experienced by everyone involved (eg clients, befrienders, clients’ families, staff, funders, referrers etc).

☑  a checklist of policies, procedures or documentation relevant to that topic. This list is not exhaustive and it may not be appropriate for every project to have all of these, but it can be helpful to make a conscious decision about each [see “Checklists” p66]

VS  this topic is covered in one of the BNS “Vital Skills in Befriending” training courses [see p75]
The Purpose of this Code of Practice

Befriending service clients are often among the most vulnerable people in our society. It is therefore essential that all befriending projects:

→ are very clear about what befriending involves
→ are accountable
→ know what constitutes good practice

This Code of Practice therefore:

→ describes the main issues which all befriending projects (both new and well established) must consider
→ sets out minimum standards which ensure safe and competent practice
→ makes suggestions to help projects develop good practice
→ gives some good practice examples
→ refers projects to other sources of support

BNS members are asked to use this document to inform their practice.

Suggestions:

» Refer to the BNS resource “Square One” for help with setting up a new befriending service [see p76].
» Use this Code of Practice as a basis for an internal project evaluation or use individual sections as a focus for Management Committee or staff meetings.
» Boost staff skills in weak areas by taking the appropriate BNS Vital Skills course [see “Vital Skills in Befriending” p75].

What is Befriending?

Befriending is:

→ a service offered to people who are identified as having particular needs, usually a specific client group who live within a specific geographical location [see “Eligibility Criteria” p48]
→ a relationship between a volunteer befriender and a client (usually 1:1) which is initiated, supported and monitored by a voluntary or statutory agency

This is distinct from “friendship” which refers to a private, mutual relationship which grows as a result of two people’s paths happening to cross. It is also important to distinguish between the meaning of the word “befriending” as it might occur in everyday usage (“making friends with”) and its meaning in relation to the provision of a professional support service of “friend-like” relationships.

Projects may set up these befriending relationships on an open-ended basis or as fixed-term arrangements (eg one year) [see “Length of Relationship” p61].

There is no statutory provision of befriending services for any client groups, so available services vary widely from location to location. It is notable, however, that the outcomes which befriending aims to achieve for clients (eg a reduction in isolation, increased resilience, improved wellbeing) fit well with the social policy goals set by both the Scottish and UK governments.

Suggestion:

» Download the BNS conference notes from 2008 on “Friendship and Befriending” www.befriending.co.uk.
Voluntary v/ Paid Befriending

Some services have paid staff who act as befrienders, but most recruit volunteers for this role. There is a range of opinion on whether payment affects the nature of the relationship: some believe that paid and unpaid befriending relationships are inherently the same; others believe that the voluntary element is key to the value of the relationship (especially as many clients may have few people in their lives who are not paid to spend time with them). Paid or unpaid, however, the same underlying principles of good practice should apply.

Types of Befriending

Face-to-Face Befriending

This is the most common kind of befriending and involves a carefully matched befriender and client meeting for a couple of hours on a regular basis (usually weekly) either at the client’s home or out in the community. A few projects arrange for clients to visit their volunteers’ homes (though it should be noted there are extra safety issues inherent in this type of service [see “Safety: Other People” p27]).

Telephone Befriending

This usually involves a befriender ringing the client they are matched with for a phone call at a prearranged time on a regular basis. There are relatively few telephone befriending projects and some of their outcomes will be different from face-to-face befriending. Some other distinct differences include:

→ usually the client and befriender do not know where the other lives (though this may also be the case for face-to-face befriending)

→ the client and befriender may never actually meet

→ clients and befrienders do not need to live near each other

→ as there is no travel, the weekly time commitment can be far less and volunteers can be easier to recruit

→ it is easy for people who are housebound to volunteer

It should be noted, however, that similar levels of project resources are needed as for face-to-face befriending and that clients and befrienders are still carefully matched on a 1:1 basis. Telephone Befriending Services are therefore clearly distinct from crisis-support / information-giving helplines.

Suggestion:

» Contact BNS to find out about specific Telephone Befriending resources.

Group Befriending

There is some debate over whether or not group activities of any sort are genuinely “befriending” services. Many befriending projects set up groups in order to be able to offer some service to people who are on their waiting list. Some find that this is a way of working with volunteers who are not immediately suitable or who have special or extra support needs. It can also be an easier way to start for someone reluctant or uncomfortable to participate in the more intense relationship involved in a 1:1 service. Other projects may match two or more volunteers with two or more clients. There are several different types of groups which may take place within a befriending context:

Open Groups

What distinguishes open groups is that they have no fixed membership and they are not formally facilitated, they may just meet for a one-off event, eg:

→ contact groups: clients on the waiting list come together so that projects are able to offer some social support in the meantime
**Group Work**

Group work is normally a more formal process, group membership is usually required and the group normally agrees to meet for a set number of sessions and for a set purpose. These groups are facilitated, eg

→ preparation groups for clients before 1:1 befriending starts, eg to build confidence
→ moving-on groups, where clients have an opportunity to test out the social skills they have developed in their 1:1 befriending
→ support circles to help clients develop person-centred dreams and plan for the future

**Group Befriending**

Group befriending is where a number of clients and a number of volunteers are matched together as an alternative to 1:1 befriending. Sometimes the ratio of volunteers to clients is 1:1 but not always.

**Peer Friendship Groups**

In peer friendship groups the role of the volunteer is to facilitate the initial stages of friendships between client members.

For the purposes of this Code of Practice the focus is on 1:1 befriending relationships, but any service which undertakes a specific matching process between any number of volunteers and clients (rather than simply inviting a group of people to gather for an activity) should find it useful.

**Peer Befriending**

In general, the definition of who counts as a “peer” is set by the aims of the relationship. So, for example, if a young person with a learning disability wants to meet other young people and do things that young people like to do, then the appropriate peer would be someone of a similar age rather than someone with a learning disability. However, if a young person recently diagnosed with epilepsy is trying to rebuild their confidence to go out and socialise, an appropriate peer would be someone who had been through the same experience, not necessarily someone of a similar age.

The benefits of peer befriending can be:

→ empathy and understanding founded on personal experience
→ inspiration, hope, practical tips
→ reciprocal support
→ a focus on “enabling” rather than “looking after”

The potential pitfalls of peer befriending include:

→ the focus being placed on the problem rather than the individual
→ possible damage to individuals’ self-esteem / recovery if they are not selected to become befrienders
→ the peer being too involved with the issue and only seeing one way (their way) of dealing with it
→ the befriender taking too much responsibility for solving the client’s problems
→ clients becoming pigeonholed rather than integrated into wider society
Befriending v/ Mentoring

There can be a broad overlap between what is called “befriending” and what is called “mentoring” and most projects fall somewhere along this continuum. However, typically, mentoring projects encourage a goal-focused approach where matched volunteer and client pairs actively work towards agreed targets and the relationship between them is mainly a by-product of this process. Befriending projects, on the other hand, tend to place the emphasis more firmly on the relationship itself. The overlap between befriending and mentoring occurs when mentoring projects ask their matched pairs to build their relationship first before moving on to work on their targets.

1. **Befriending** – the role of the volunteer is to provide informal, social support. The primary objective of the relationship is to form a trusting relationship over time, usually in order to reduce isolation and to provide a relationship where none currently exists. Other outcomes may occur, eg a growth in confidence, but these are never set as objectives for the relationship.

2. **Befriending** – the role of the volunteer is to provide informal, social support. There may be additional stated objectives at the start of the relationship, eg increasing involvement in community activities. The success of the relationship is not dependent on these objectives being achieved, but they are seen as a potential benefit of befriending over time.

3. **Befriending/Mentoring** – the role of the volunteer is to provide informal, social support and through this supportive relationship to go on to achieve stated objectives, eg increasing clients’ confidence to enable them to do activities independently in the future. The objectives form a basis of discussion between project, volunteer and client at an early stage and are reviewed over time.

4. **Mentoring/Befriending** – the role of the volunteer is to develop objectives with the client over time. Initially the role is to develop a relationship through social activities in order to establish a level of trust on which objective-setting can be based. Due to the client’s changing circumstances, objectives may take time to set and may be low key.

5. **Mentoring** – the role of the volunteer is to work with the client to meet objectives which are agreed at the start of the relationship. These are achieved through the development of a trusting relationship which involves social elements but which retains a focus on the objectives agreed at the start.

6. **Mentoring** – the role of the volunteer is to work with a client solely on agreed objectives which are clearly stated at the start. Each meeting focuses primarily on the achieving the objectives and the social relationship, if achieved, is incidental.

Suggestion:

» Download the BNS “Befriending / Mentoring Spectrum” from: www.befriending.co.uk.
**Aims of Befriending**

The primary aim of befriending is to enhance the quality of a client’s life by offering them the opportunity to form a trusting relationship. More specifically, projects also often aim to enable their clients to:

- become less socially isolated
- develop their self confidence and emotional growth
- increase their capacity to use their personal resources
- enhance their skills for forming and maintaining relationships with others
- develop greater resilience
- increase their wellbeing
- feel supported by someone who is consistent and reliable
- experience some purely social interaction on a regular basis (ie not simply as a by-product of receiving another service)

**What is Good Practice in Befriending?**

A Good Practice project:

- sets achievable targets in relation to its resources [see “Section 2: Running a Befriending Project” p15]
- recruits volunteers systematically and carefully in accordance with its policies [see “Recruiting Befrienders” p37]
- supports its befrienders through providing training, supervision and expenses [see “Section 3: Managing Befrienders” p35]
- provides a professional service to its clients, including referral, waiting list, assessment, matching, and ending procedures [see “Section 4: Clients” p47; and “Section 5: Matches” p53]
- protects its clients [see “Section 2: Running a Befriending Project” p15; and “Section 4: Clients” p47]
- is governed effectively [see “Governance” p16]
- supports the work and development of its Project Coordinator and other staff [see “Section 2: Running a Befriending Project” p15]
- monitors all aspects of its practice [see “Section 2: Running a Befriending Project” p15]
- continues to review its policies and procedures in response to internal and external evaluation of its service [see “Section 2: Running a Befriending Project” p15]
# Section 2 – Running a Befriending Project

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Governance

Governing Body’s Responsibilities

The Management Committee / Board of Directors / Board of Trustees of a charity leads the strategic development of the organisation and is legally liable for its activities. The day-to-day management of the project should be delegated to staff as far as possible. The Scottish Council for Voluntary Organisations [SCVO] lists a governing body’s responsibilities as ensuring that:

- the organisation is clear in its purpose and direction (rolling strategic planning is recommended)
- all decisions taken are in line with and safeguard the ideals and purpose of the organisation as laid out in its founding statement or constitution
- assets are safeguarded and used efficiently for those for whom the organisation exists
- the organisation fulfils all its legal obligations
- the organisation is managed effectively, operates efficiently and works within: its policies and budgets, any relevant good practice guidance, and the law
- the organisation is accountable financially and to charity regulators
- there is a proper procedure for the recruitment and supervision of staff
- the management committee / board itself represents stakeholders and functions effectively

Governing bodies should meet a minimum of four times a year and take minutes of their meetings. S&CP

Suggestions:
- Visit the Scottish Council for Voluntary Organisations’ Governance website for more information and links to other resources www.scvo.org.uk/governance.
- Ask BNS to provide training to help the project’s governing body plan for the future of the organisation.
- Prepare an Induction Pack for new management committee / board members [visit the resources section of the BNS website for examples www.befriending.co.uk].

Support for Staff

It is particularly important that project staff (most of whom are expected to nurture relationships between potentially vulnerable clients and their befrienders) receive appropriate training as well as regular support and supervision – typically from a senior member of staff or a member of the management committee. S&CP BNS recommends that:

- befriending coordinators have a minimum of one face-to-face support and supervision session every three months
- befriending coordinators have a named person who will conduct support and supervision sessions and that, as far as possible, this remains consistent
- befriending coordinators and their supervisors have an agreed agenda to allow both people to prepare for the sessions
- where there isn’t anyone within the organisation qualified to provide support and supervision, training is provided or external specialist support and supervision is sought and budgeted for

Suggestions:
- Consider taking the nine-part “Vital Skills in Befriending” training course run by BNS [see “BNS Services: Training” p75]. VS
- Ask BNS to provide external supervision for the Project Coordinator [see “BNS Services: Consultancy” p74].
Case Study:

A mental health project has a written policy on the “Implementation of Staff Supervision” which covers:

- Aims of Supervision
- Responsibilities of the Supervisor and of the Supervisee
- Frequency
- Confidentiality
- Recording
- Accountability
- Special Circumstances
- Supervision Agreement (guidance on taking a supervision history and negotiating an agreement)

All staff undertake supervision training and those with managerial responsibilities are given training in providing supervision. All staff receive at least a one hour session of supervision each month.

Project Responsibilities

Befriending projects need to take responsibility and be accountable for the service they are offering. Projects have responsibilities towards: befrienders; clients; employees; referring agencies; funders; regulatory bodies (eg OSCR); and the wider community.

Each project has a responsibility to:

- be clear and explicit about the services they offer
- operate a professional service
- recruit and manage staff and volunteers appropriately - providing adequate training, support and supervision
- protect clients’ confidentiality
- treat clients with respect
- protect clients from abuse or exploitation
- protect volunteer befrienders from undue risk
- have transparent and accountable working methods
- foster an equal opportunities culture

Paid Staff

It is strongly recommended that projects employ paid staff to run befriending services. Key responsibilities for staff usually include:

- developing project policies and procedures
- keeping up-to-date with relevant legislation
- managing and forecasting the project budget
- promoting the service to potential clients, volunteers, referrers and funders
- recruiting and selecting volunteer befrienders
- training befrienders
- building relationships with client referral agencies
- processing client referrals
assessing clients (often in their own homes)
matching clients with befrienders
providing regular support and supervision to befrienders
providing ongoing support to clients
reviewing the progress of matches
supporting clients and befrienders at the end of a relationship
evaluating the service provided
reporting to the management committee, funders, referrers and regulatory bodies (eg OSCR [The Office of the Scottish Charity Regulator] or The Charity Commission for England and Wales)

**Project Coordinator**

Many or all of the above tasks are usually undertaken by a Project Coordinator [see “Staff:Befriender Ratios” p19]. Some projects employ more than one Coordinator and this role can also be suited to job-sharing. The appointed Coordinator(s) should:

- be adaptable and versatile
- have excellent communication skills in a range of situations:
  - 1:1 meetings with clients and befrienders
  - group settings
  - meetings with other professionals / networking events
- have knowledge of the specific needs of the client group they will be working with and understand the potential impact of befriending on all concerned
- be aware of the significance of boundaries, both within befriending generally and for their specific client group
- understand the wider environment in which the project operates (including the voluntary or statutory sector and relevant legislation)
- understand the issues involved in working with both vulnerable people and volunteers
- be skilled in:
  - recruitment
  - people management - including the provision of effective support and supervision
  - client assessment
  - delivering training
  - project management and development

**Suggestion:**

» Visit the resources section of the BNS website for sample job descriptions and person specifications for staff [www.befriending.co.uk].

**Administrator / Fundraiser**

Befriending staff should have the support of other paid staff in the tasks of administration and fundraising as these can become significant areas of work that detract from the management of a caseload of befrienders and clients. [GP] If this is not possible, the client caseload must be adjusted appropriately [see “Staff:Befriender Ratios” p19].
Staff:Befriender Ratios

The number of befriending matches that can be adequately supported by a project depends on the level of available resources. There are many variables, including:

- the number of staff hours dedicated to managing befriending
- whether or not home visits are carried out for all clients
- the level of support required by volunteers
- the project location: rural / urban
- levels of book keeping and/or administrative support for project staff
- whether or not project staff have responsibility for fundraising and reporting to funders
- the level of support from the board / management committee
- how well established the project is
- whether the project is part of a larger organisation or is independent

It is therefore impossible to provide definitive recommendations of how many matches the average project can sustain, however the following flowchart provides a very rough guide [see “Staff:Befriender Ratios Outline” p71 for a table which summarises the same information].

It should be noted that calculating the ideal ratio is not simply a matter of working out the number of staff hours required for each client – the coordinator will have to undertake certain tasks (eg designing promotional materials, writing funding reports etc) whether they are supporting 10 matches or 25.

_Suggestion:_

» If the project’s ratios are significantly different from these, think about which areas of practice are suffering as a result (eg the amount of direct support and supervision given to volunteers) and whether it is still possible to provide Safe and Competent Practice.
**Budgeting**

In addition to the budgets required by all staffed organisations (ie: full salary costs, staff training and standard running costs including an allowance for inflation), befriending projects should also make provision for:

→ recruitment, induction and ongoing training for befrienders
→ befrienders’ expenses
→ publicity materials

**Policies & Procedures**

Each project will have its own policies and procedures depending on the nature of its service and the structure of its organisation. There are, however, several fundamental issues which should be addressed at a policy level by all befriending projects S&CP. Also outlined below are some additional policies which are an indicator of good practice GP.

**Suggestions:**

» Compare the organisation’s existing policies against the “Policies Checklist” [see p67].
» Review key policies and procedures on an annual basis and note both the review date and when the next review is due on the policy.
» Look at the sample policies and procedures available free to BNS members on www.befriending.co.uk.

**Case Study:**

» One organisation has developed a Policy and Procedure Review Timetable to ensure that all policies are revisited on a regular basis. Review of policies is a standing item on the Board’s Agenda. For each policy, the Timetable lists:
  › the policy title
  › the date the policy was last approved by the board
  › the month and year when it will next be reviewed
  › which sub-committees / staff will be involved in the review

The following list is not exhaustive as individual projects may also have other policies and procedures which are essential in relation to the specific service they provide and/or the client group they work with (eg a Medication Policy, Personal Care Policy etc). Further, projects may use different terminology or have combined two or more of these policies:

**Anti-Bullying Policy**

An anti-bullying policy should apply to everyone involved in the organisation (including members of the governing body, staff, clients and befrienders) and it should define bullying as a disciplinary offence. Standard grievance procedures are often insufficient as most bullying is committed either by the victim’s line manager or by a co-worker - often with the line manager’s active or tacit support. There must therefore be a confidential route the bullied person can use to access help. Anti-bullying policies usually involve a two-stage process: informal and then (if there is no resolution or the allegation is particularly serious) formal.

**Suggestion:**

» Visit www.bullyonline.org for more information.
**Complaints / Grievance Policy**  
This policy should apply to complaints and grievances in relation to both staff and volunteers within all aspects of the organisation. It should also include how clients, families, carers and referral agencies can make a complaint, and specify how this would be dealt with (including time-scales).

**Confidentiality Policy**  
Befriending staff and volunteers will inevitably learn confidential information about their clients. This may include information about someone’s sexuality, medical condition, financial situation, history of abuse, addiction, criminal record, family history etc. Staff and volunteers must exercise common sense and discretion in identifying whether information they receive is expected to remain confidential as this may not always be made explicit.

A Confidentiality Policy should consist of guidelines on the sensitive handling of personal information within the project and between organisations eg: referral agencies. This policy should be made available to staff, befrienders and clients (and their carers or guardians where appropriate). Other agencies should be made aware of the project’s policy and aspects of it with which they are expected to comply.

Projects should be clear about:

→ what types of information should be considered confidential for each of the following groups:
  › staff
  › volunteers
  › clients

→ any situations where the rules of confidentiality don’t apply (eg in cases of suspected abuse) and exactly how this should be done, by whom, and to whom (eg social services, police, health workers)  
  [see “Protection of Children / Vulnerable Adults / Vulnerable Groups Policy” p24]

→ what records should be kept, with what security measures, for how long, and how they will be securely destroyed when no longer required  
  [see “Data Protection Policy” p21]

→ how the data that is held will be reviewed in order to dispose of outdated information

→ who staff and volunteers can share confidential information with

→ what circumstances are appropriate for discussing confidential issues

→ what rights people have to access confidential information held about them

→ what action will be taken if a member of staff or a volunteer breaches the confidentiality policy:
  › legitimately, eg: where child protection issues, personal safety and life threatening situations are involved  
  [see “Protection of Children / Vulnerable Adults / Vulnerable Groups Policy” p24]
  › inadvertently, eg: disclosing a client’s identity / details by mistake  
  [see “Supporting and Supervising Befrienders” p44]
  › deliberately, eg: wilful inappropriate disclosure or gossip  
  [see “Disciplinary Policy” p22 and “Setting the Boundaries with Befrienders and Clients” p57]

**Data Protection Policy**  
Information about individuals, whether stored on computer or paper, falls within the scope of the Data Protection Act (1998), under which personal data must be:

→ obtained and processed fairly and lawfully  
  → not kept longer than necessary

→ held only for specified purposes  
  → processed in accordance with the Act

→ adequate, relevant and not excessive  
  → kept secure (including during disposal)

→ accurate and up-to-date  
  → not transferred out of Europe

Any organisation which holds “personal data” (ie any information which relates to an identifiable living individual) must register as a Data Controller with the Information Commissioner’s Office [ICO].  
[Visit the “For Organisations” section of the ICO website for more information: www.ico.gov.uk.]
**Disciplinary Policy**
In 2004 it became a legal requirement for every employer to have a written disciplinary policy (that meets or exceeds statutory minimum requirements) and to give a copy of this policy to all employees. If employers don’t do this (and comply with the Statutory Dismissal Procedure) any subsequent dismissal may automatically be deemed to be unfair. Projects should also consider including how they would respond to any severe misconduct by befrienders within this policy.

*Suggestion:*

**Disclosure Policy**
Disclosure Scotland requires that all registered organisations have a written policy on the handling, holding and destroying of Disclosure information. This information must not be kept for any longer than required after the recruitment decision has been taken. **NB:** The Disclosure Scotland Code of Practice for recipients of Disclosure information was revised in 2007 and the time limit for keeping Disclosure information (except in exceptional circumstances) has been reduced from six months to 90 days. It is each project’s responsibility to ensure it understands and meets all current legal requirements.

**NB:**
» New legislation in Scotland (the Protection for Vulnerable Groups (Scotland) Act 2007 (PVG) vetting and barring system) is tentatively scheduled to come into force in 2010 and will involve significant changes for the Disclosure system. Visit www.scvo.org.uk and www.scotland.gov.uk/Topics/People/Young- People/children-families/pvglegislation for updated information on the implementation of this act.
» Following the Safeguarding Vulnerable Groups Act 2006, the Independent Safeguarding Authority (ISA) was set up, which, from November 2010, will require that everyone in England and Wales who intends to undertake activities involving children or vulnerable adults must first be registered. To do so will require the carrying out of an Enhanced CRB Disclosure. For more information visit: www.isa-gov.org.uk.
» Projects in England and Wales should see the Criminal Records Bureau website: www.crb.gov.uk.
» Projects in Northern Ireland should see the Access Northern Ireland website: www.accessni.gov.uk.
» Projects in Ireland should see the Garda website for information on the Garda Vetting Procedure: www.garda.ie.

*Suggestion:*

**Driving Policy**
If befrienders are allowed to drive clients in their cars, projects should have a specific policy which covers:
- the befriender’s responsibility for ensuring appropriate insurance [see “Insurance - Car Use” p29]
- what documentation should be shown to the project (eg insurance certificate, MOT certificate if appropriate, current full driving licence) and how regularly
- what expenses can be claimed
- who is responsible for providing suitable child seats (where required)
- any permission required from a parent / guardian / carer
- the procedure for notifying the project if the befriender: has an accident which is their fault; has their licence endorsed with penalty points; or loses their licence for any reason
The policy should also cover staff who use their cars in the course of their work (ie not simply for commuting).
Equal Opportunities Policy

Being an Equal Opportunities organisation means actively combating both individual and institutional discrimination against groups of people (e.g. on the grounds of race, gender, sexual orientation, disability, faith, age or class). This is an extremely important issue for befriending organisations as their clients are likely to be particularly vulnerable to discrimination; however their Equal Opportunities policy should address all areas of their work, including:

- staff recruitment
- volunteer recruitment and selection [see “Recruiting Befrienders” p.37, and “Assessing and Selecting Befrienders” p.39]
- client referrals [see “Referrals” p.48]
- matching [see “Issues to Consider in Matching” p.54]

It may actually be necessary to treat people differently in order to provide them with the same opportunities, e.g.: how can potential befrienders or clients with restricted literacy levels learn about a befriending project if its information materials are all paper-based?

Financial Management Policy

This policy should include:

- how the organisation’s financial viability is monitored and reviewed, and by whom
- how budgets are set, when and by whom
- how reserves are built and what levels should be maintained
- how salary levels are set and reviewed
- staff pension provisions
- authorised staff spending limits
- the use of bank accounts, cheques, debit cards, online banking, etc
- who within the organisation can incur expenses and to what level
- petty cash procedures and limits
- staff and volunteer expenses (this may be a separate policy in its own right)
- the procedure for drawing up and auditing / inspecting annual accounts

Health & Safety Policy [see “Safety” p.26]

- each organisation should have a nominated Health and Safety Officer (consider sending them on a one day Health & Safety course)
- records should be maintained for emergency evacuations
- accidents must be recorded in an Accident Book (which must meet the requirements of the Data Protection Act [see “Data Protection Policy” p.21])
- equipment and machinery must be checked and maintained regularly (electrical equipment should be PAT tested annually)
- fire procedures must be explained to everyone, displayed clearly and practised
- there should be a trained First Aider within the organisation
- procedures for Risk Assessments (both on and off the premises) should be detailed [see “Risk Assessments” p.26]
- detailed procedures should be written describing how to report incidents (including any differences in the procedures for staff and volunteers)
- environmental health issues (such as display screen working, room temperature and lighting) should be included
Health and safety requirements (eg in relation to: the requirement for fire alarms; the number of first aiders needed and the degree to which they should be trained; and whether a Health and Safety at Work poster must be displayed etc) may vary according to the size of the organisation. All staff and volunteers should be made aware of their responsibilities according to the legislation.

**Suggestions:**

» For further information on these topics, visit the Health and Safety Executive website: www.hse.gov.uk and the Scottish Centre for Healthy Working Lives website: www.healthyworkinglives.com.

» Consider developing a recording system for “near miss” incidents and using these records to help when reviewing risk assessments.

**Lone Working Policy** S&CP  [see “Safety” p26]

Both staff and volunteers may often be required to work alone (possibly outside normal hours): in the office, visiting a client’s house, and/or out in the community. It is important to think about how the inherent risks can be minimised, for example by:

→ taking references for new clients before visiting them for the first time [see “Client Referrals” p26 and “Information from Referrers” p49]

→ scheduling initial visits to new clients for daylight hours

→ ensuring the exterior of office buildings and car parks are well lit

→ considering any risks involved in first meetings between potential volunteers and staff

→ asking staff and volunteers to let someone else know where they are going to be, how long they expect to be there and when they return (eg by text)

→ giving staff and volunteers personal attack alarms / work mobile phones

Different people feel unsafe in different situations and lone working procedures should be flexible enough to respond sensitively to these variations.

**Suggestion:**

» Download the “Personal Safety Guidelines for befriending and mentoring programmes which work with children and young people (guidelines for coordinators, leaflet for volunteers, poster)” which the Mentoring and Befriending Foundation [MBF] in England has developed in collaboration with the Suzy Lamplugh Trust. Search for “Personal Safety Guidelines” on www.mandbf.org.uk.

**Photography Policy** GP

It is important to ensure that befrienders and project staff have the client’s permission (as well as that of their parent / guardian if appropriate), preferably in writing, before taking any photographs. Specific permission should also be sought from everyone featured before using any photographs in publicity materials, on websites or before sharing them with any other organisation.

**Protection of Children / Vulnerable Adults / Vulnerable Groups Policy** S&CP

This policy should:

→ state who is being protected

→ define what is meant by “harm” and “abuse”


→ list the responsibilities of the organisation, staff, volunteers and referrers in relation to the protection of children / vulnerable adults

→ lay out the procedures to be followed if it is suspected that someone is being harmed

→ refer to the organisation’s Confidentiality Policy [see p21] and describe under what circumstances individuals can break confidentiality, to whom, and how
**Suggestion:**

» Visit [www.scotland.gov.uk](http://www.scotland.gov.uk) for information on the relevant legislation.

**Rehabilitation of Offenders Policy**

This should lay out the organisation’s commitment to follow the legal requirements of The Rehabilitation of Offenders Act 1974 (as a minimum). Reference should be made to the organisation’s Disclosure Policy [see p22] and how any enhanced Disclosures will be used in line with the Act. This policy should also be written with reference to the organisation’s Equal Opportunities Policy [see p23] and Protection of Children / Vulnerable Adults / Vulnerable Groups Policy [see p24].

**Suggestion:**

» Download the Volunteer Centre Edinburgh factsheet on “Ex-Offenders and Volunteering” from [www.edinburghvolunteers.org/resources/exoff.html](http://www.edinburghvolunteers.org/resources/exoff.html) and their “Sample Policy on the Recruitment of Ex-Offenders” [www.edinburghvolunteers.org/resources/exoff_policy.html](http://www.edinburghvolunteers.org/resources/exoff_policy.html).

**Support & Supervision Policy**

Regular and frequent 1:1 support and supervision should be provided as a matter of course for both staff and volunteers. [see “Support for Staff” p16, and “Supporting and Supervising Befrienders” p44.] These sessions should be minuted, with both action and development plans drawn up. This policy should describe who will provide the support (eg the Project Coordinator will manage volunteers, the Chair of the Management Committee will manage the Project Coordinator etc) and how frequently. A system of annual appraisals should also be included. External support should be sought if expertise is not available internally.

**Training & Development Policy**

This should refer to induction and ongoing training and development for volunteers in all roles as well as paid staff. The policy should be clear about which training (if any) is compulsory (or refer to individual role descriptions which specify this). Procedures for reviewing individuals’ training needs on a regular (usually annual) basis should also be included and a training record kept.

**Suggestion:**

» For BNS training designed for befriending staff, see “BNS Services: Training” p75.

**Volunteer Policy**

This policy should include commitments to:

→ value volunteers
→ treat them with respect and dignity
→ avoid using them to do work which should be done by paid staff

It should also outline:

→ how and why volunteers will be used within the organisation
→ the induction, training and ongoing support that volunteers will receive [see “Training and Development Policy” p25]
→ volunteer expenses procedures and entitlements
→ insurance cover for volunteers [see “Insurance” p29 and “BNS Services: Project Insurance” p76]
→ what opportunities they will have for personal and/or professional development

[See “Section 3 - Managing Befrienders” p35.] Reference should be made to other policies which are relevant to volunteers (eg Lone Working Policy [see p24], Health & Safety Policy [see p23] etc).
Safety

Risks in Befriending

Risk must be a careful consideration for both clients and volunteers because:

→ volunteers work 1:1 with vulnerable people
→ volunteers may be relatively inexperienced in working with that client group
→ there is no direct supervision
→ clients may meet their befriender in a variety of different locations - possibly including the client’s (or, in some cases, the befriender’s) home
→ meetings often take place outside office hours

Projects cannot eliminate risk altogether but they are required by law to manage it as far as is reasonably practicable. They can manage it effectively by ensuring good practice, especially in the following areas:

→ Assessing and Selecting Befrienders [see p39]
→ Training Befrienders [see p42]
→ Supporting and Supervising Befrienders [see p44]
→ Referrals [see p26]
→ Matching [see p54]
→ Boundaries [see p56]
→ Confidentiality [see p60]
→ Beginnings and Endings [see p62]

Suggestion:
Projects should pay particular attention to their Health & Safety Policy and Procedures [see p23], reviewing them annually and striving to achieve a balance between optimum safety and reasonable freedom. Rather than restricting activities, good risk management should give projects the confidence to be adventurous.

Client Referrals [see p48]

Projects should ask referrers to disclose any information they have about the client’s circumstances which might affect a befriender’s safety. Referrers therefore need to be fully aware of the nature of befriending: it that it takes place on a 1:1 basis, is not directly supervised and may involve home visits. They should be asked to notify projects if they become aware that a change in the client’s circumstances might affect a befriender’s safety. Referrals may need to be rejected if safety is compromised. If clients self-refer (or are referred by family / friends) this source of information is not available and projects may want to consider seeking external (professional) references for clients.

Risk Assessments

Projects should:

→ assess the potential risks which befrienders will encounter and consider the safety implications
→ seek to minimise these risks
→ prepare befrienders to work with vulnerable people by raising their awareness of situations which could potentially be misinterpreted and lead to allegations [see “Boundaries” p56]
→ consider any potential risk alongside potential gain
Case Study:
» A project which works with elderly people with dementia have based their Risk Assessment procedures on the Health and Safety Executive’s straightforward “Five Steps to Risk Assessment” guide:
  › Step 1: identify the hazards
  › Step 2: decide who might be harmed and how
  › Step 3: evaluate the risks and decide on precaution
  › Step 4: record your findings and implement them
  › Step 5: review your assessment and update if necessary
Visit www.hse.gov.uk/risk for more information.

Locations and Activities
The location of befriending meetings should be considered carefully and both the client and befriender should be encouraged to tell the project worker if they do not feel comfortable with a setting. Projects should be explicit about whether befrienders can visit clients’ homes (and vice versa) - for some projects this is the core of their work, others don’t allow it.

Each project should think about which activities are safe and appropriate for befrienders and clients to do together and should consider whether any of them require specific written consent from parents / guardians. Projects may want to draw up lists of “approved” activities and venues, and ask befrienders to discuss any other possibilities in advance. It is up to individual venues (eg cinemas) to ensure they are safe for the public, however projects may need to consider how safe a venue or activity is for each individual client.

Matching Meeting VS [see “Matching” p54]
The client and befriender should be introduced to each other by a member of staff from the project. Befrienders should never be introduced to a client who has not previously been met by a member of staff.

Health and Hygiene
Projects should consider whether their befrienders will encounter health and hygiene risks, and take action to raise awareness of these issues and minimise any risks involved. Befrienders should be reminded to use their common sense and discretion to judge whether or not they could be at risk and to take action to minimise this.

Other People
It is important to remember that only the people directly involved in the befriending relationship are risk-assessed. For example, do other people who live in the client’s house pose a risk to the befriender? Equally, the befriender may have had a Disclosure carried out and have given references, but their friends and family have not. Further, it should be remembered that (despite their best efforts) the project may not be aware of every pertinent aspect of someone’s background. Projects should ensure that their policies and procedures specifically state their practice in these areas.

Case Study:
» A befriender took her young daughter on an outing to the beach with the client she was matched with. Later the project became aware that the client was a Schedule One sex offender (ie he had been convicted of a sexual offence against a child under 17).

Personal Details
Projects should think about which personal details clients and befrienders can share with each other and should be clear about their reasons for these decisions. Do both parties have access to the same type of information about each other (eg: family circumstances, address, phone number)? [see “Boundaries” p56]
**Befriender’s Responsibility**

If a befriender is very clear about their role, it is easier for them to respond appropriately if a problem arises. Volunteers with little or no experience of working with vulnerable people may not understand the possible implications of actions which they may see as simply being helpful and polite (e.g., going to the cash machine for the client, or helping them with their medication) [see “Boundary Guidelines” p57]. Projects should therefore:

- use befriender training to explain why each safety procedure is in place
- use support & supervision sessions to reinforce the importance of safety procedures
- explore emergency scenarios during training
- explain to befrienders what activities and actions they are insured for [see “Insurance” p29]
- decide what action to take if a befriender consistently ignores health and safety guidelines [see “Disciplinary Policy” p22 and “Health and Safety Policy” p23]

**Suggestion:**

» Consider providing befrienders with emergency contact numbers or the client’s next of kin details (with their written permission).

**Befriender’s Own Safety**

Befrienders legally have to take some responsibility for their own personal safety, for example:

- removing themselves from / avoiding unsafe situations (e.g., poorly lit areas)
- ensuring they have adequate transport (e.g., by being aware of bus times)
- letting someone know where they are going and what time they expect to return (while respecting client confidentiality [see “Confidentiality” p60])
- informing the project if they are concerned for their safety

Projects should be careful not to encourage a culture of bravado, and should respect each befriender’s personal sense of what is and isn’t safe for them.

**Client’s Safety**

Projects should be clear with their befrienders about the level of responsibility they have for the client’s safety (e.g., regarding the avoidance of unsafe activities or compliance with the law regarding the use of seatbelts and car seats). Befrienders should be given guidelines for what to do if the client does not agree with their assessment of unacceptable risk.

**Suggestions:**

» Verify the safety of befrienders’ cars, e.g., by taking copies of insurance and MOT certificates, and driving licences on an annual basis [see “Driving Policy” p22].

» Consider offering first aid training to volunteers.

**Case Study:**

» A project which works with elderly clients makes a full assessment of each client’s vulnerability based on information gathered: during assessment, from the referrer, on an ongoing basis from their befriender, and through client Reviews. Clearly defined procedures are then written for each client’s befriender. For example, if a client who has been assessed as being extremely vulnerable doesn’t answer the door, the befriender is expected to ring a named contact. If the same happens with a client who has been assessed as being more resilient, the befriender should try to ring the client later the same day and notify the Project Coordinator if there is still no response. Phone numbers for appropriate contacts and agencies are provided to each befriender.
Insurance

Organisational
Projects should ensure that they have public liability and personal accident insurance for befrienders [see “BNS Services: Project Insurance” p76].

Car Use [see “Driving Policy” p22]
Befrienders should inform their insurance company if they are using their own car in the course of their volunteering (rather than simply to travel to and from meetings with their clients) as some insurers count this as “business use”. If the insurer has not been informed they could refuse to pay in the event of a claim. There may be a small additional charge for this extra cover and projects should consider reimbursing their befrienders.

Out-of-Hours Procedures
Projects should consider the out-of-hours support they can realistically provide for befrienders - this may be in emergencies only.

Befrienders should be given emergency contact numbers, eg out-of-hours Social Work Department, taxi service, the client’s next of kin (if appropriate).

Suggestion:
» Consider providing emergency procedures and contact details on a laminated credit-card sized card which befrienders can carry with them at all times. S&CP

Other Safety Issues to Consider
Safety may be compromised by certain activities eg: alcohol may change the dynamics of a situation. Equally, a client or a befriender’s medical condition may have an impact on safety and projects may want to ask both parties to disclose any such conditions; however such information must never be shared without the individual’s permission. It should also be made clear to everyone involved that if either the client or befriender ever has an acute infectious illness (eg flu or chicken pox) then the befriending service will be temporarily suspended in order to protect the other person.

Staff Safety
Many of the issues described above are also relevant to the project staff. Staff should not overestimate their abilities and should avoid placing themselves at risk in order to assess situations for their befrienders.

Suggestions:
» Assess the safety issues for clients and befrienders and consider the links between safety and the project’s recruitment, training, supervision, support, referral and matching procedures.
» Make sure the project gathers enough information to make an adequate assessment of the potential safety issues in each befriending relationship. S&CP
» Provide guidance on safety issues to befrienders and ensure they understand their own responsibilities. S&CP
» Provide ID badges for staff and befrienders. S&CP
» Maintain a sense of proportion and recognise where the limits of the project’s responsibilities lie.
» Offer befrienders a personal alarm or use of an emergency mobile phone if they don’t have their own.

Case Study:
» Following an incident when a befriender collapsed while out with their client with learning disabilities, one project now issues their befrienders with credit-card sized, laminated emergency contact cards. The cards have the befriender’s name and photograph, plus contact numbers for: the project, the social work out-of-hours team, the local police station, and emergency contacts for both the client and the befriender.
Involving Clients and Befrienders

As well as being involved in befriending itself, there should be opportunities for both befrienders and clients to participate in the project in other ways.

Reasons for Wider Involvement of Clients and Befrienders

→ to ensure that the project reflects the views of the people it works with
→ to create a sense of ownership / belonging to a project
→ to enable befrienders and clients to make a positive contribution and to learn new skills
→ to complement the work and skills of paid staff
→ to employ the skills, enthusiasm and dedication of volunteers who have applied to be befrienders but who are not suitable for the role

However, clients and volunteers must not be used to do work which should be the responsibility of paid staff [see “Volunteer Policy” p25].

Possible Areas for Involvement

→ management committees / advisory groups
→ training
→ organising social events
→ promoting the project to potential volunteers, clients, referral agencies and funders
→ befriender and/or staff recruitment
→ peer support
→ project evaluation (including focus groups)
→ contributing to newsletters and annual reports
→ compiling directories of local activities and useful phone numbers
→ fundraising
→ external training / conferences (giving feedback to others)
→ attendance and presentations at AGMs

It may not be feasible for clients and befrienders to participate in all these areas, or it may be more appropriate for them to be involved on an occasional basis rather than regularly.

Questions to Consider

→ how much training and support will be required to enable clients and befrienders to become involved in the first place?
→ will participants fully understand and abide by the project’s policies, eg: confidentiality, equal opportunities?
→ do people want to engage with the project in this way?
→ how much participation can the project support?

Suggestions:

» Projects should look at how they can involve befrienders and clients more widely in their work.
» Projects should be aware of the impact that this involvement may have (both on the project and on the individuals) and should review this regularly. If very few people want to be involved in an activity, it may be that the project is expecting an unreasonable level of commitment from its befrienders and/or clients and may risk alienating them. If facilitating a certain kind of involvement requires a disproportionate amount of staff time this may not be the best use of the project’s resources.
Case Study:
» One project involves clients in their induction training for volunteers. This ensures that clients have a say in how befrienders are trained, gives volunteers valuable experience and allows staff to observe how the potential befrienders interact with people with learning disabilities.

Monitoring & Evaluation

The Definition of Monitoring and Evaluation

Projects often confuse monitoring and evaluation. The processes are related but different:

→ **monitoring** means collecting information on a day-to-day basis on what happens within the service: “what do we do? how much of it do we do?”

**Examples of Monitoring Questions**
- How many referrals are there each year?
- What type of people apply to become befrienders?
- How many matches does the project support at once?
- How often is the client meeting with their befriender?

→ **evaluation** involves making a value judgement on the basis of the monitoring information that has been gathered - eg by comparing it with targets and deciding whether or not the service has been successful in achieving its outcomes: “is the project achieving what it set out to do?”

**Examples of Evaluation Questions**
- Does the number of referrals indicate there is still a need for the service?
- Do the applicants represent a cross section of the local community?
- Are the resources adequate for the number of matches?
- Is the befriending having the impact that the project hoped?

It is vital to put effective monitoring systems in place from the beginning in order to be able to carry out a comprehensive evaluation later on.

It is often useful to think about how monitoring and evaluation will be carried out even earlier - ie when designing a project or when writing funding applications. The process of thinking about how something will be recorded and evaluated can help to keep proposals realistic and ensure that outcomes are meaningful.

Once a project has been in existence for a couple of years, funders will be looking for an in-depth systematic evaluation of the service to have been carried out.

Monitoring and Evaluation Terminology

There are many different expressions used in monitoring and evaluation. These often cause confusion as different funders use the same words in slightly different ways, or use different words to mean the same thing. It is therefore always important to:

→ check what words and phrases your funders use and that you understand exactly what they mean by them
→ explain clearly what you mean by each phrase when writing reports
The following list sums up the usual meanings of some of the common monitoring and evaluation phrases:

### Monitoring and Evaluation Glossary

| Aims | • statements which describe what the project sets out to achieve (aims relate to objectives)  
|      | • eg: "To reduce the social isolation of people over the age of 70 who live alone." |
| Baseline | • a measurement of someone’s situation before they receive a service  
| Impact | • the effect a service has on its clients  
|          | • eg: "After receiving our service, clients will go out of the house more frequently and will feel less socially isolated." |
| Objectives | • statements about what the project will do by a specified date (objectives relate to aims)  
|          | • eg: "The project will recruit and train 12 volunteer befrienders by the end of year one." |
| Outcomes | • changes which describe the project’s impact on beneficiaries (outcomes relate to outputs)  
|          | • eg: "72% of clients say that, as a direct result of having a befriender, they now take part in more social events." |
| Outputs | • the activities or end products the project generates (outputs relate to outcomes)  
| Stakeholders | • all the different groups of people who are involved in different ways with the project  
|          | • eg: clients, carers, clients’ families, volunteers, staff, funders, trustees, referral agencies |
| SMART | • Specific, Measurable, Achievable, Realistic, Time-bound (usually in relation to objectives)  
|          | • eg: "Within 6 months, 5 people with severe and enduring mental health problems will have been matched with trained volunteer befrienders." |

### Why is Evaluation Important?

Systematic evaluation (based on appropriate monitoring) is essential in order to:

→ ensure clients receive the best possible service
→ ensure befrienders feel appropriately supported and benefit from their experience as volunteers
→ provide relevant feedback to:
  > funders
  > management committees
  > other stakeholders
→ find out in which areas of service delivery the project is strong and in which it is weak
→ ensure appropriate service development and good business planning

### Setting Up a Monitoring and Evaluation System

Think about:

→ what the project is aiming to achieve for all its different stakeholders, including:
  > clients
  > volunteers
  > staff
  > funders
→ what information needs to be gathered (before, during and after the service has been provided) in order to assess whether or not the project has achieved each of these aims
→ how to gather both quantitative (ie numerical, easy to measure) and qualitative (descriptive) information
→ how (and when) these different pieces of information can be collected
how the results will be analysed
whether evaluations will be internal (i.e., carried out by staff, committee members, or a volunteer with the appropriate skills) or external (i.e., commissioned from an independent organization or consultant)
how often evaluations will be conducted
how the findings will be acted upon

Suggestions:
» Look at some sample evaluations [search for Project Evaluations on www.befriending.co.uk].
» Ask BNS for support with setting up a monitoring and evaluation system.
» Use the client’s assessment as a means for establishing their baseline (see the sample Assessment of Needs Form on the Resources section of the BNS website: www.befriending.co.uk). A similar format can then be used to measure any changes or developments during Reviews. [GP]
» Budget for an independent external evaluation every three to five years when preparing funding proposals. [GP]
» Visit the Evaluation Support Scotland website: www.evaluationsupportscotland.org.uk for information, resources, training, and services.

Case Study:
» When setting up, a mental health project was acutely aware that they would need to evaluate their project carefully in order to: satisfy funders’ requirements; support matches effectively; and be aware of any need to alter their procedures. They therefore set very clear indicators of success from the start (e.g., “clients go out more regularly” and “clients tell us they feel less isolated”) and gathered baseline information (i.e., about how often clients went out and how isolated they felt) during assessments. This made it easy for the project to use client Reviews to track any changes which took place during the time the client had a befriender.
Section 3 – Managing Befrienders

What is a Befriender? p36
Recruiting Befrienders p37
Assessing and Selecting Befrienders p39
Training Befrienders p42
Supporting and Supervising Befrienders p44
What is a Befriender?

As with any volunteering role, it is helpful for projects to think through what tasks they are asking befrienders to carry out and therefore what personal characteristics and experience are required.

**Role**

A befriender’s role is to develop a trusting relationship with the client they are matched with.

**Responsibilities**

A befriender has responsibilities both to their client and to the organisation which manages their work:

- **to the client are...**
  - to provide a friend-like relationship which is reliable, consistent and dependable
  - to provide support in a caring and responsible way, establishing and maintaining appropriate boundaries

- **to the organisation are...**
  - to represent the befriending project in regular interactions with clients and help the project fulfil its aims
  - to be accountable to the project, abiding by its policies (e.g., re confidentiality, attending support and supervision sessions)

**Tasks**

In order to carry out their role and fulfil their responsibilities, befrienders are usually asked to:

- undergo a standardised selection process [see "Assessing and Selecting Befrienders" p39]
- complete a required programme of induction training [see “Training Befrienders” p42]
- commit to spending time (or speaking on the phone) with their client on a regular and planned basis
- plan activities to carry out with the client, as appropriate
- report back to project staff as required (e.g., by e-mail after each meeting with the client)
- co-operate with the project’s administrative procedures
- attend regular support and supervision sessions with the Project Coordinator
- attend ongoing training and networking opportunities

**Suggestion:**

» Compile a list of befrienders’ responsibilities and tasks to assist with volunteer recruitment, training and support & supervision.
Befriending Code of Practice - Section 3: Managing Befrienders

Recruiting Befrienders

Person Specification
Not everyone will have the skills, personality and lifestyle to enable them to become a good befriender, so projects should write a person specification before starting to recruit volunteers for this role. Each project should decide whether or not the befriender person specification forms part of the application pack given to potential volunteers, or whether it is simply kept for staff to refer to. The ideal befriender might be:
- a warm person
- a good communicator (especially 1:1)
- reliable
- punctual
- regularly available
- able to make a commitment to the project for a considerable length of time (eg a minimum of six months)
- able to handle stress calmly
- able to maintain confidentiality
- self aware and able to reflect on their befriending relationship
- knowledgeable of the particular issues faced by the client group
- able to use their initiative and work within guidelines without direct supervision
- aware of the potential significance and importance of the befriending relationship for the client
- aware of their own support needs within befriending
- empathetic and understanding
- open-minded
- respectful of other people’s life choices, values and beliefs

Suggestions:
» Draw up a role description and person specification for befrienders [BNS members can visit www.befriending.co.uk to download free samples].
» Make sure that written befriender person specifications and role descriptions are jargon-free.

Advertising
Most projects will need to advertise for volunteer befrienders at some time. The following are some of the more common methods used:
- articles in the local press
- appeals on local radio stations
- stalls at volunteer recruitment fairs
- paid adverts in papers / magazines
- leaflets & posters in:
  > local volunteer centres  > GP surgeries
  > community centres  > colleges / universities
  > sports centres  > supermarkets
  > libraries  > churches
### Suggestions:

» Before designing promotional materials to advertise for befrienders, look at other organisations’ leaflets and posters (e.g., at the local volunteer centre) to judge what works well.

» Think about what kind of people the project hopes to attract as volunteers, and target advertising (in terms of style, content, and placement) accordingly [see “Recruiting Specific Groups of Volunteers” p38].

» Ensure staff are able to follow up any volunteer recruitment campaign responses immediately (e.g., have application packs ready to post out).

### Case Study:

» A mental health charity had a stall at a summer fair and asked members of the public to complete a three-question mental health awareness quiz in order to enter a prize draw. Entrants were also asked whether they would like to receive further information about the charity’s work. This exercise resulted in the recruitment of several volunteers, with the project already having some idea of the individuals’ understanding of mental health issues.

### Recruiting Specific Groups of Volunteers

**Justifiable “Discrimination”**

Although there is no anti-discrimination legislation which relates to the recruitment of volunteers, as with paid employees, the recruitment process should only be exempt from Equal Opportunities compliance when there is a justifiable reason. For example:

- in peer befriending - where the aim is to match people who have similar characteristics (e.g., the befriender has, or used to have, the same health condition as the client)
- when a specific positive role model is needed (e.g., a male befriender for a child who has no positive male influence in their lives)
- if the client group has a particular vulnerability (e.g., a female befriender for a woman who has experienced abuse by men)

**Under-Represented Groups**

If projects find that certain groups are under-represented among their volunteers (e.g., they have no befrienders who are from a particular ethnic minority / male / disabled), it is good equal opportunities practice to advertise in ways and locations which are likely to appeal to these groups. It would only be discriminatory if someone was treated less favourably during the selection process purely because of their status or circumstances.
Assessing and Selecting Befrienders

The Assessment and Selection Process

Potential volunteers should be assessed against the criteria identified in the Befriender Person Specification [see p37]. These qualities cannot be assessed fully during a simple question and answer session, so projects should use many or all of the following stages of the recruitment process to help with this (though the order may vary slightly):

- Initial enquiry
- Application form
- Initial selection interview
- References & Disclosure check
- Introductory training course
- Final selection interview
- Early review/once matched

Contact with potential volunteers at each stage of the process (including during introductory training [see p42]) is an opportunity for staff to assess their suitability on an ongoing basis. It is important that the selection process is managed sensitively in accordance with the project’s core aims and values and its Equal Opportunities Policy [see p23].

Suggestions:

» Try to ensure that the responsibility for selecting befriender does not rest with one person. 

» Directly involve more than one person in the interview and selection process of each applicant (eg during interviews or training).

» View the introductory training course as part of the selection process.

» Make it clear to applicants that an invitation to attend introductory training does not mean they will definitely be accepted as a befriender.

» Hold initial selection interviews before deciding whether to invite applicants to introductory training.

Initial Enquiry

Prospective befrienders need to know exactly what they are applying to do and therefore need to be given clear, jargon-free information about:

→ the organisation / project they will be volunteering for

→ the needs of the client group the project works with

→ what befrienders do [see “Person Specification” p37]

→ the minimum time they will be required to commit to:
  › training
  › befriending
  › supervision

→ how much support will be available to them on a 1:1 basis (and in a group setting)

→ how volunteers are selected, trained, and matched with clients

→ what expenses they can claim

Suggestion:

» If this information is given to prospective volunteers verbally (face-to-face or on the phone), give them a written version as well, eg in a Volunteer Handbook.

Application Form

Application forms are central to the selection of volunteer befrienders because they:

→ formalise the selection process

→ provide a record of the applicant’s personal details (eg name, address, occupation, referees)

→ present a personal statement of why the applicant wants to befriend and what they can offer

→ can be used to acquire signed permission for Disclosures
**Initial Selection Interview**

A selection interview offers applicants the opportunity to:

→ explore their motivation for applying to be a befriender (this may be quite complex)

→ outline their life experience and how it may relate to the client group

→ learn more about how the project works

It also allows projects to:

→ get to know applicants on a personal level

→ observe applicants’ interpersonal skills (often in a 1:1 setting)

→ gauge applicants’ understanding of the issues faced by the client group

→ explain what is expected from a befriender and what support is provided by the project

→ gather information about individual volunteers’ skills, hopes and expectations before becoming a befriender - this baseline can then be compared with their experiences during and at the end of their match [see “Monitoring and Evaluation” p31]

**References**

References allow projects to get information on applicants’ personalities, experience, skills and attributes from people who know them well.

References are usually requested in writing, ideally by using a standardised form. This ensures that important issues are addressed and that the same information is gathered about each applicant. The questions asked should relate to the Befriender Person Specification [see p37].

References may be taken up at any stage in the selection process, but satisfactory references must have been received before the applicant starts befriending. **NB:** As long as the confidential nature of the reference is made clear from the start, people have no automatic legal right to view references written about them (though an industrial tribunal could order that they are produced if there was a discrimination claim).

**Suggestions:**

» Treat all references in confidence and ensure that both the referee and subject of the reference are aware of this policy. **S&CP**

» Give referees information about the project and what the befriender's role will be. **GP**

» Ask for referees who have known applicants for at least two years. **S&CP**

» Take up at least two references for each applicant. **S&CP**

» Ensure that referees are not family members / partners. **S&CP**

» Keep signed copies of references.

» Consider asking for at least one professional / educational and one personal reference. **GP**

**Case Study:**

» A project which works with vulnerable children asks for a medical reference for all befrienders.

**Disclosure Checks**

Disclosures have replaced Police Checks as the means by which potential employers and organisations within the voluntary sector can access criminal history information on applicants. Disclosures are certificates, produced by Disclosure Scotland, which give details of an individual’s criminal convictions or which state that they have none. The Scottish Government pays for charities to carry out Disclosures and this process is managed by the Central Registered Body in Scotland [CRBS]. In England and Wales this process is managed by the Criminal Records Bureau [CRB] and in Northern Ireland by AccessNI.
Enhanced Disclosures

Enhanced Disclosures (the highest level) must be obtained for all individuals who are working with children up to 18 or adults at risk. By default such positions are now classified as exempt from the Rehabilitation of Offenders Act 1974. This means that even convictions which are considered “spent” under the Act will be disclosed if they are relevant to the post the individual is applying for. Relevant non-conviction information may also be disclosed.

Projects must be clear about:

→ who they are entitled to request Disclosures for
→ what level of Disclosures they should be requesting (eg befrienders working with adult carers who are not classed as “vulnerable” probably would not require an Enhanced Disclosure)
→ how to describe the work the volunteer will be doing in order to trigger the release of relevant Disclosure information
→ how they handle Disclosure information [see “Disclosure Policy” p22]

NB:

» New legislation (the Protection for Vulnerable Groups (Scotland) Act 2007 (PVG) vetting and barring system) is scheduled to come into force in 2010 and will involve significant changes for the Disclosure System. [Visit www.SCVO.org.uk and www.scotland.gov.uk/Topics/People/Young-People/children-families/pvglegislation for updated information.]

» A Disclosure only provides information on UK criminal records. It may be possible to request a police check from other countries if a potential volunteer has lived or worked overseas. [Visit the CRB website for advice on how to proceed: www.crb.gov.uk/guidance/rb_guidance/overseas.asp.]

» Since April 2000, asylum seekers (people in the process of applying for refugee status) have been allowed to volunteer. This includes whilst they are appealing against a decision to refuse them asylum. They may have a letter which says they must not engage in paid or unpaid work, but this does not relate roles that are clearly voluntary. Guidance from the Home Office confirms that asylum seekers are entitled to receive out-of-pocket expenses.

» Unless sufficient alternative background checks are possible, it is recommended that who have lived or worked abroad for significant periods of time are involved in directly supervised, group or office-based roles only.

Suggestions:

» While very important, remember that Disclosures should only form one small part of a project’s screening and selection procedures. A “clean” Disclosure is not, in itself, an indication that someone is safe to work with vulnerable people. It could simply be that they have not come to the attention of the judicial system - as yet.

» Ask applicants to complete a Self-Disclosure Form before sending off for their Enhanced Disclosure from CRBS. This gives them the chance to explain in advance any issues which might be revealed in their Disclosure, and provides an early opportunity to discuss the relevance of any such issues with project staff.

» Visit the Disclosure Scotland website: www.disclosurescotland.co.uk or the CRBS website: www.crb.org.uk for information on how to carry out Disclosure checks in Scotland. The site for projects in England and Wales is: www.crb.gov.uk and the site for those in Northern Ireland is: www.accessni.gov.uk.

Final Selection Interview

This second interview:

→ helps to make it clear to applicants that the induction training is part of the selection process
→ gives projects the chance to check with each individual what they have learned from their training, assess if they are ready to become a befriender, and give them feedback on how they have performed during the rest of the selection process
→ allows projects to check out any concerns that may have arisen during the training process about an individual’s suitability (asking another member of staff to attend will provide a second opinion)
→ provides a confidential setting to help unsuccessful candidates think about other more appropriate volunteering opportunities

Suggestions:
» If an applicant is turned down at any point in the process, or if they decide that they aren’t suited to the role of befriender after all, signpost them to other possible volunteering opportunities - either within the organisation or through the local volunteer centre.

» Think about whether or not it is appropriate for people with personal experience of the client group’s situation to become befrienders and, if so, whether there be any restrictions on when they get involved. Consider including this information in recruitment materials [see “Recruiting Befrienders” p37].

Case Studies:
» One befriending project which works with people who have cancer does not allow relatives of people who have died from cancer to volunteer until at least three years after they have been bereaved. The project feels that until that time the volunteer’s motives may be confused and they may not have completed enough of the grieving process to be effective, focused volunteers.

» Many mental health befriending projects find that a large proportion of their volunteers have personal experience of mental health problems and that the knowledge, empathy and understanding these people bring to their befriending is invaluable [see “Peer Befriending” p11].

Training Befrienders

Introductory Training
The provision of a course of introductory training for potential befrienders is a fundamental requirement. This training is usually provided by project staff for a group of applicants; however projects which recruit volunteers on a more sporadic basis often provide training on a 1:1 or distance learning basis [see “Other BNS Resources: The Distance Training Pack: How to Train Your Home-Based Volunteers” p77]. Volunteers should complete their introductory training before they are finally accepted as a befriender and before they are matched with a client.

Purpose
Projects provide introductory training for volunteers in order to:
→ explain the realities of being a befriender
→ enable applicants to make informed choices about whether to become a befriender
→ assess applicants’ suitability for the role
→ provide clients with befrienders who are suitably prepared

Course Length
There is no definitive course length, but typically introductory training will take place over a number of sessions in order to:
→ test the commitment of befrienders before matching them
→ cover subjects in sufficient depth
→ allow project staff time to build a working relationship based on trust with each volunteer
→ enable group processes to develop
→ give project staff time to assess befrienders
→ allow project staff and applicants the chance to reflect on the course content
Content
An introductory training course for befrienders usually includes the following topics:

- an exploration of volunteers’ motivations, expectations, hopes and fears
- the project’s definition of befriending and description of the befriender’s role [see “What is a Befriender?” p36]
- communication and listening skills
- relationship building
- relationship boundaries within befriending [see “Boundaries” p56] S&CP VS
- beginnings and endings of befriending relationships [see “Beginnings and Endings” p62] VS
- attachment / separation and loss
- client group-specific information (e.g., child protection training or dementia awareness)
- attitudes and values - prejudices and discrimination / equal opportunities
- personal development / self reflection
- project policies and procedures S&CP, including:
  - Confidentiality Policy [see p21]
  - Health & Safety Policy [see p23]
  - Lone Working [see p24]
  - Emergency Procedures
  - Complaints / Grievance Policy [see p21]
  - Expenses

[See “Befriending Training Topics Checklist” p70 Maria.]

Further Training
Projects should offer further training on relevant topics once befrienders are matched S&CP. This:

- furthers befrienders’ personal and professional development
- ensures any changes in project policies and procedures are communicated to volunteers
- helps volunteers to:
  - meet each other
  - gain mutual support
  - feel part of the organisation
  - work better in their role
  - develop specialist skills
  - continue to feel motivated in their role

Suggestions:
» Ensure Project Coordinators are trained as trainers. S&CP VS
» Compare the project’s existing Introductory Training topics for befrienders against the Checklist [see p70].
» Consider buying the following training resources from Befriending Network Scotland [see “Other BNS Resources” p76]. They can be ordered online from the BNS Publications Store on www.befriending.co.uk.
  - “Befriending Network Scotland Training Toolkit - Improving Training in Befriending”
  - “The Distance Training Pack: How to Train Your Home-Based Volunteers”
  - “Quality of the moment: Befriending & Dementia Training Toolkit” (available in 2010)
  - “What do Mentoring and Befriending mean to you?” DVD / video
  - “Changing Lives” DVD / video
» Invite existing befrienders and clients to an Introductory Training session to share their experiences.
» Ask befrienders to suggest topics for further training sessions.
» Think about whether or not all volunteers are required to attend further training.
Case Study:
» One project which works with elderly people offers their befrienders the opportunity to attend training which equips them to work with clients who have early stage dementia. This training includes information on: working with carers, communication, dealing with challenging behaviour, memory and reminiscence work. In addition, the project regularly runs sessions for volunteers on things that they might enjoy doing with their clients, eg: making befriending diaries containing photos of trips out and things collected on those trips (leaves and pressed flowers from walks in the country; bus, theatre and cinema tickets, menus from cafes etc). The project also sends befrienders on courses which are particularly appropriate for their match (eg moving and handling).

Supporting and Supervising Befrienders

Why do Befrienders Need Ongoing Input?
1:1 befriending inherently takes place without direct supervision from either project staff or peers. This means that being a befriender can be isolating and stressful and it can be difficult for projects to protect the needs and rights of both befrienders and vulnerable clients. Further, the nature of a befriending relationship inevitably changes over time (for example there may be pressures on both parties to adjust the boundaries that they set initially [see “Changes to Boundaries” p60]) and these changes need to be monitored by the organisation which is accountable for the relationship. Befrienders also need to know that their work is appreciated by the project.

The Difference between Support and Supervision
Support and Supervision are different tasks, but are often carried out together. Support focuses on the needs of the befriender; supervision focuses on ensuring the wellbeing and safety of the client.

<table>
<thead>
<tr>
<th>Support</th>
<th>Supervision</th>
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<tbody>
<tr>
<td>focuses on needs of the befriender, by...</td>
<td>focuses on protecting the client, by...</td>
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<tr>
<td>...showing the befriender their work is appreciated and valued</td>
<td>...monitoring and evaluating the relationship</td>
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<tr>
<td>...giving the befriender emotional and practical support</td>
<td>...setting objectives (where appropriate)</td>
</tr>
<tr>
<td>...reducing stress and isolation</td>
<td>...maintaining the project’s accountability for the service provided</td>
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Individual Sessions

Scheduled, individual, face-to-face sessions are crucial for supporting and supervising befrienders. This approach is invaluable because:

→ a personal relationship is built with a designated member of staff
→ issues specific to each particular relationship can be explored appropriately and safely, in confidence
→ relationships can be monitored on a routine basis and any potential problems can be identified and tackled early - often before the befriender is aware of them
→ relationships can be evaluated easily over time, including the impact of the relationship on both the client and the befriender [see “Monitoring and Evaluation” p31]
→ projects can ensure they are truly accountable for the service provided by their volunteers

Projects should not be tempted to forego scheduled sessions and rely on an “open door” policy alone, believing that befrienders will contact them if there are any problems. Some will, but many won’t and by the time problems become evident harm may have been done to the client, the befriender and/or their relationship. Also, as noted above, problem-solving is only one of Support and Supervision’s many functions.

Equally, although it may appear to save time in the short term, meaningful support and supervision cannot be delivered in a group setting. It would not be suggested for paid staff and should not be relied upon as the only means of supporting volunteers. Befrienders may not feel comfortable raising difficult or sensitive issues in a group setting and problems may therefore go unreported. There are also likely to be considerable problems surrounding confidentiality. Further, staff will not be sufficiently tuned in to each relationship in order to recognise potential problems before they develop.

Suggestions:

» Provide each befriender with a 1:1, face-to-face support and supervision session soon after they have been matched and then at least every six months, with scheduled phone / e-mail support and supervision provided regularly between these meetings. S&CP

» Aim to provide each befriender with one session of support and supervision for approximately every four client meetings. GP If volunteers live a long way from the project office (for example in rural or telephone befriending projects), some of these sessions may take place on the phone.

» Make regular attendance at 1:1 support and supervision sessions a requirement of being a befriender. This requirement should be explicitly stated in a Befriender Agreement (a document signed by each volunteer once they have been accepted as a befriender or when they are first matched with a client) and/or during Introductory Training [see p42]. S&CP

Follow-Up Contact

It is important to be aware of the possible need for occasional extra follow-up telephone, e-mail or text contact, especially if there are some difficulties in the match or the befriender is new.

Group Sessions

In addition to 1:1 support, there is great value in giving befrienders the opportunity to meet for group support sessions. GP They allow befrienders to:

→ discuss common issues
→ support each other
→ feel less isolated
→ feel that they belong to the wider project / organisation

Some projects may choose for such sessions to be compulsory, others may offer occasional optional events.
Other Ways to Support Befrienders

Other Support Methods

There are many other ways that projects can ensure their befriender feel supported, stay motivated and feel that they are an important part of the organisation, for example by:

- laying on social events (eg at Christmas)
- producing a newsletter (or distributing copies of The Befriender, sent quarterly to BNS members)
- providing ongoing training [see “Further Training" p43]
- gathering and disseminating useful information, for example on:
  - the client group
  - suitable activities in the local area
  - external training / networking opportunities
- having client-specific resources available to borrow (eg memory boxes for dementia clients, toy/book boxes for children)
- paying out-of-pocket expenses (including dependent / child-care expenses)
- organising group activities for clients and befrienders to attend together (eg bowling, cinema visits etc)
- remembering birthdays and sending a card
- encouraging befrienders to report on how meetings have gone (eg by text or e-mail)

Case Study:

» A young people’s project gives their volunteers the chance to come together every two months. Attendance is high as it is made clear to potential befrienders at their initial interview that this is an important part of their commitment to the project. Sometimes these meetings include some further training, sometimes they do fun team-building activities (the drumming session was a real hit!) but mainly they provide the opportunity for befrienders to meet each other and share their experiences, swap good ideas and seek advice. This not only helps befrienders on a practical level, but also helps them feel connected to the project, keep motivated, and feel that they are an important part of the wider package of care provided for their client group. The meetings happen in the evenings and the project provides the befrienders with a snack.
Section 4 - Clients

Referrals p48
Waiting Lists p50
Client Assessments p51
Keeping People Informed p52
Referrals

Eligibility Criteria
Each befriending project has a specific population to which they can provide their service - determined by the interests / aims of the organisation and usually stipulated in funding agreements. The client group is usually defined both by being “socially isolated” and by fulfilling one or more other criteria, for example in relation to:

- age
- disability
- mental health
- physical health
- life experience (e.g., carer, abuse survivor, difficulties at school)
- sexuality
- addiction
- location

Projects should also make it clear that clients must want to have a befriender.

Suggestions:
>
- Ensure that both eligibility criteria and the aims of the project (in terms of outcomes for clients) are clearly defined and well publicised in order to ensure appropriate referrals (and in order to avoid having to reject ineligible clients).
- Make a point of being aware of other local organisations so that inappropriate referrals can be signposted to alternative sources of support.

Information for Referrers
Potential referrers should be made aware:

- what the eligibility criteria are
- how to make a referral and what will happen next
- that applying for a befriender must be the client’s choice

It can also be helpful for potential referrers to receive:

- case studies showing how befriending can benefit an individual
- a definition of the befriender’s role and its limitations
- a description of how befrienders are recruited, selected and trained
- copies of / extracts from relevant policies and procedures (e.g., Equal Opportunities, Complaints, Waiting List etc)
- information on the length of the waiting list

Suggestions:
>
- Keep referrers informed of any changes in relevant policies, procedures or waiting times [see “Keeping People Informed” p52].
- Make a point of contacting referral agencies on (at least) an annual basis to ensure they have up-to-date copies of promotional materials, contact details and other information, and to make sure you have a current named contact for their organisation.

Case Study:
>
- One project holds an information event for all its referral agencies each year. These events allow project staff to build relationships with referrers and to inform them about the services the project provides. More importantly, however, the aim is also to try to reduce the number of inappropriate referrals and ensure that referrers can give clients an accurate understanding of what befriending is when they describe the service to them. Although typically only 10-20% of invited referrers turn up, the events have been successful and the project sends out a summary of the discussions to all the referrers on their database.
Information from Referrers

Projects must think about what information they need from referrers, including any which may:

→ have implications for a befriender’s or client’s safety [see “Other Safety Issues to Consider” p29]

→ help the project make an appropriate match

It is important to be explicit about which of this information will be passed on to the befriender, bearing in mind the client’s right to confidentiality [see “Confidentiality Policy” p21].

It is also useful to find out what referrers hope their clients will gain from having a befriender. This information can help projects evaluate the success of the service for each individual client (from the referrer’s perspective) and may also provide some direction for future project development [see “Monitoring and Evaluation” p31].

Suggestion:

» See the Befriending Resources A-Z at www.befriending.co.uk for examples of Referral Forms.

Types of Referrer

Projects must decide who can refer clients to them. For example: other services within their own organisation; external agencies; friends / family; clients themselves.

Referral Routes

Suggestions:

» Have clear procedures for receiving referrals from different sources - this may involve having different types of Referral Forms.

» Be clear about what information will be recorded (both during the referral process and during the course of the match) and about who will have access to it.

» Ensure adequate background information is gathered to allow appropriate risk assessments to be conducted.
Referral Agencies
It is important to establish and maintain positive relationships with referral agencies by ensuring regular personal contact and good communication. It can be helpful for referral agencies to be made aware that:

→ befriending is usually a complementary service for clients, rather than being the only support needed
→ they may need to continue to be involved with the client, both while they are waiting to be matched with a befriender and afterwards

Friends / Family and Self-referrals
If referrals are accepted from these sources, it is especially important to be sure that:

→ the eligibility criteria have been met
→ the client has chosen to seek support from befriending
→ the role of the befriender is made clear
→ everyone understands what information will be shared with whom

Without the involvement of a referral agency there can be a lack of background information and projects may need to find another way of gaining enough information to enable them to assess the situation they are putting a befriender into [see “Safety: Client Referrals” p26] and match people effectively [see “Issues to Consider in Matching” p54]. Before a project asks an external agency to supply such information, however, clients should be asked to give their (written) consent, eg by signing an Information Sharing Agreement.

Case Study:
» One project has designed a “Sharing of Information Agreement” form. Self-referring clients who are over 16 use this form to list people they know who the project can contact for further background information. People listed may include members of their family or friends but the client is encouraged to include at least one professional who can contribute to the project’s risk assessment for the client.

Waiting Lists

Many befriending projects receive too many referrals [see “Staff:Befriender Ratios” p19] and have to operate a waiting list. Projects should consider how/if they will prioritise clients - for example on the basis of the level of support needed, the urgency of the person’s situation, and/or their geographical location. The importance of creating matches with the best possible chance of success [see “Matching” p54] means that the suitability of available befrienders should dictate when someone is matched, rather than where they are on the list.

Managing Waiting Lists
Potential clients (and their referrers) should be kept informed of how long they are likely to have to wait for a befriender. If it becomes likely that they are never going to be matched, it is unfair to keep them on the list - especially if they might be able to seek support from elsewhere.

There are three main ways of keeping waiting lists more manageable:

→ developing more restrictive eligibility criteria
→ closing the list when it reaches a certain length
→ increasing the turnover of clients (by encouraging shorter befriending relationships / specifying fixed-length matches - eg 12 months)

Suggestion:
» Develop a well thought-through and reasoned waiting list policy and explain this to referrers and potential clients. If waiting lists become too long it may be necessary to review the policy.
Client Assessments

Most projects carry out initial assessments with potential clients in order to:

→ check that the client matches the project’s eligibility criteria
→ give the client (and their family / carer / referrer, as appropriate) information about:
  › how the project is run (including relevant policies & procedures)
  › what a befriender’s role is... and isn’t (this will help to ensure the client doesn’t have unrealistic expectations) [see “Boundary Guidelines: Role of the Befriender” p58]
  › what are appropriate boundaries within the befriending relationship [see “Boundaries” p56]
  › what will happen next
  › how they will be introduced to their befriender
  › what ongoing support they will receive from the project
  › who to contact in an emergency
  › where possible this information should be given in a written format so people can refer back to it
→ ensure that the client (and their family if appropriate) wants to have a befriender
→ answer any questions
→ find out what the client’s preferences are, for example regarding:
  › the type of person they would like to be matched with
  › the kind of activities they want to do
  › how often they want to meet
→ get to know the client and what kind of person they are in order to be able to match them appropriately
→ set the client’s “baseline” [see “Monitoring and Evaluation” p31] - ie what does the client (and their family / referrer, if appropriate) hope will be the benefit(s) of having a befriender?
→ fill out any required paperwork (eg consent forms)
→ carry out a risk assessment of the client’s potential for challenging behaviour (eg is the client a child who is likely to run away or an adolescent who finds it hard to manage their temper?)
→ conduct a risk assessment of the client’s home if the befriender will visit them there

The Purposes of Client Assessments

- confirm eligibility and willingness
- provide information and answer queries
- get to know the client
- complete paperwork
- conduct risk assessments

Suggestions:

» Have an assessment visit checklist which lists:
  › the topics to cover
  › the forms which need to be completed
  › the materials which need to be given to the client (and/or their parent, carer or guardian)

» Make sure that information materials are written clearly, jargon-free and accessible for the client. Be ready to produce them in large print, on coloured paper, on tape/CD, with symbols or in Braille, if necessary. Before visiting the client, ask them whether they can read standard print.

» Visit the Befriending Resources A-Z on www.befriending.co.uk for sample client information materials, assessment checklists, assessment forms and agreements.
Keeping People Informed

Referral Agencies

Before Matching
Referral agencies should be told how long it is likely to be before their client is matched and should be kept informed of any further delays. It is important to establish how much ongoing involvement the referral agency plans to have with the client. This will help to avoid too much pressure or inappropriate responsibility being placed on the project or on an individual befriender.

After Matching
The type of feedback given to referrers about the befriending relationship should be thought through very carefully. It is extremely important that clients are aware of any ongoing communication between the project and the referrer and know what types of information will be passed on [see “Confidentiality” p60]. Some projects may expect referral agencies to take part in relationship Reviews and, likewise, some referrers will ask befriending project staff to participate in their own review processes.

Where the referral agency maintains contact with the client and may be aware of changes in their circumstances, it should be agreed that they keep projects up-to-date with any change which could have an impact on the befriender’s activities. Clients should be made aware of this arrangement.

Suggestion:
» Projects may want to establish guidelines for referral agencies which describe ongoing information-sharing processes and expectations.

Clients (and their Carers / Family where appropriate)

Before Matching
Clients need to receive clear, accessible information on the service they can expect to receive and details of who to contact if they have any questions. They should also be kept informed about:

→ where they are on the waiting list
→ approximately how long it will be before they are matched with a befriender
→ whether the project offers any other services to people on their waiting list (eg group activities)
→ what information will be sought about them from other people
→ what the matching process entails

Where appropriate, this information should be provided in writing.

After Matching
In addition to meeting their befriender and having ongoing contact with the Project Coordinator during regular Reviews, clients should be officially notified of any changes to project policies or procedures which will impact on their experience of the service. They should also be given adequate warning of any alterations to the level of service they are receiving and, if possible, of the end of their befriending relationship [see “Endings” p62]. Again, this information should be provided in writing, where possible.

Suggestion:
» Project Coordinators should hold regular Review meetings with clients. The befriender should not be present during these meetings. BNS recommends holding a Review after the first three or four meetings between the client and their befriender, and then at least every six months. These meetings allow projects to: check how the client feels about their match; gather information for Monitoring and Evaluation purposes; give the client updates on relevant project developments; and assess whether or not it is appropriate for the match to continue.
Section 5 - Matches

Matching p54
Boundaries p56
Confidentiality p60
Length of Relationship p61
Beginnings and Endings p62
Matching vs

Matching involves deciding which volunteer will work with which client based on the ProjectCoordinator’s assessment of the suitability of each person to form a relationship with the other.

The Importance of Matching

The aims of careful matching are to:
- ensure that each relationship is given the best opportunity to become established
- meet the needs and expectations of both parties
- ensure that project staff feel able to be accountable for the relationships they support

The Decision Making Process

The decisions on matching should be carried out by staff who have met both the volunteer and the client, and are therefore aware of their needs and expectations as well as of the personalities involved. Matching decisions may be easier if they are discussed with a third party, for example a colleague, manager or management committee member, especially if this person has met the volunteer and/or client.

Group events which allow volunteers and clients to meet informally may also help coordinators make matching decisions, although it is important that these occasions are handled very sensitively in order to avoid raising false expectations. Project Coordinators should explore any “naturally occurring” matches carefully in order to ensure that normal matching criteria apply.

Suggestion:
- Download the sample Matching Checklist Form from the BNS website: www.befriending.co.uk. This form allows Project Coordinators to plot reasons for and against a proposed match in respect of both the client and befriender.

Issues to Consider in Matching

The issues involved in matching befrienders with clients are varied and complex. Issues which may need to be taken into account include:
- the befriender’s experience and abilities
- personalities
- availability - how close they live to each other and the times both people are available
- age
- gender
- race, ethnicity, culture
- sexuality
- interests
- opinions of the client’s carer(s) / relative(s), if appropriate
- the attitudes of befrienders and clients (as well as any possible bias on the part of those involved in making the matching decisions)
- safety of the befriender and the client
- commonality of experience (ie if the befriender and the client have shared similar life experiences - NB: this may prove to be either helpful or unhelpful)

Projects should think about which choices they allow clients to make about who they are matched with. This should be done in the context of the project’s Equal Opportunities policy [see p23]. For example, if a client is encouraged to say if they would prefer to be matched with someone of a similar age to themselves or only
want a befriender of the same gender, projects should consider whether or not it is also acceptable for them to say that they only want to be matched with someone of the same race or sexuality. Some projects are clear that this would constitute discrimination and would not offer that client a service. Others say it is the client’s right to make that choice. It should be remembered, however, that volunteers should not be exposed to situations where they are likely to be treated negatively.

If clients’ preferences mean they are likely to wait some time before a match can be found, they should be made aware of this [see “Waiting Lists” p50].

**Gut Feeling**

Often the matching of a specific befriender with a client will "feel right". Whilst these feelings can be helpful, it is important to try to clarify and articulate the underlying reasons. Matching should not be based on “gut feeling” alone, but should allow a much more detailed consideration of the relevant issues and, preferably, the involvement of a second member of staff.

**Case Study:**

» One children’s project has worked hard to develop its matching techniques. Their clients have already faced a lot of disappointment and rejection in their lives and so the project is very aware of the need to make the best possible matches. The Project Coordinator spends time getting to know each referred child - usually taking them out on a trip themselves. Volunteer training takes 15 hours to give staff time to get to know the potential befrienders well. Staff say: “Although we are often guided by our ‘gut feeling’ about a match, we have to justify our decisions to both referrers and parents, it’s not enough to say ‘it just feels right’, we have to think about why it feels right.” Matching decisions therefore include careful consideration of whether the volunteer has the skills and attributes to enable them to form a strong bond with the child. If so, what are these attributes? Are they particularly good at listening, or able to deal calmly with a child who is hyperactive? Are they good at sensitively drawing a withdrawn child out of themselves? These questions enable the project to know what underpins their “gut feelings” about who will make a good match.

**Information Sharing**

The matching process will inevitably involve the sharing of some personal information either verbally or in writing. Organisations should discuss with befrienders and with clients which information may be shared with the other party before they meet [see “Confidentiality” p60; and “Confidentiality Policy” p21]. Organisations may choose to ask befrienders and clients to write profiles or complete questionnaires on themselves so that written information can be given to the person they are matched with before an introduction meeting is organised.

**Rejection**

In order to avoid letting the client down, befrienders should receive information on their potential match first and should be given the opportunity to discuss any concerns and reject the match if they are not happy to proceed. If they are willing to go ahead, information on the befriender should then be shared with the client who should also have the chance to discuss any concerns and turn the match down.

**First Meetings**

Both befrienders and clients are likely to be apprehensive about their first meeting [see “Beginnings” p62]. Project staff should:

→ ensure that the first meeting is held in a location where both the befriender and the client are likely to feel comfortable
→ make sure both parties know the meeting does not have to last any longer than they want it to
→ be present (at least at the start) in order to introduce befrienders and clients to each other, establish practical issues and clarify any outstanding questions
→ explain why each person has been matched with the other

**Suggestions:**

» *Develop and implement clear, recorded, matching procedures.* S&CP

» *Base matching decisions on a thorough examination of relevant issues and on the preferences and personalities of everyone involved.*

» *Discuss matching decisions with a third party.* GP

» *Offer clients and befrienders choice - in line with the project’s Equal Opportunities Policy.*

» *Try to ensure that first meetings are as stress-free as possible.*

» *Consider using the first meeting as an opportunity for both the client and befriender to sign a Befriending Agreement - a document which outlines the responsibilities and rights of everyone involved: the client, the befriender, and the project.* Some Project Coordinators prefer to go through the agreement with befrienders and clients on a 1:1 basis soon after the first meeting in order to give each person time to reflect before signing.

### Boundaries

Boundaries are limits which everyone sets (unconsciously or consciously) in all their relationships. They govern what people share of themselves and how they manage their interactions at home, work and socially.

**In Befriending**

Well-managed, explicit boundaries are fundamental to good befriending practice and should be seen as a positive concept rather than a restrictive barrier. They help to:

→ ensure the protection and safety of both befrienders and clients
→ establish a safe, dependable setting for a developing befriending relationship based on trust
→ define where befrienders stand on issues of confidentiality, conduct and working limits
→ avoid dependency and/or confusion for vulnerable clients
→ prevent the breakdown of relationships

**Setting Policies on Boundaries**

In order to take into account different perceptions about boundaries (eg as an unwelcome barrier to friendship or as a necessary precaution), projects should involve a range of people when setting / reviewing boundaries, policies and guidelines, eg:

→ befrienders
→ clients
→ management committees
→ referral agencies

**Volunteer Training, Support and Supervision**

Projects should:

→ help befrienders prepare for having befriending boundaries tested by being creative in their training
→ ask befrienders to explore their existing personal and professional boundaries and think about how these sit with those laid down by the project
encourage befrienders to think about how to resist pressure to take on inappropriate roles
work with individual befrienders to set the boundaries for their particular befriending relationship
be aware that some befrienders may need more support than others to recognise and keep boundaries
regularly review the changing boundaries and the role of the befriender within each relationship
ensure befrienders and clients are aware of the implications if they develop a friendship which moves outside the project’s support and supervision including:
  › the end of expenses
  › no insurance cover
  › no further project responsibility
[See “Beginnings and Endings” p62.]

Setting the Boundaries with Befrienders and Clients

It is important for both befrienders and clients to know that a project has:
  → general boundaries for all of its befriending relationships
  → specific boundaries for individual relationships

Projects should:
  → ensure boundaries are established from the start of a befriending relationship
  → be able to refer back to the baseline boundaries if difficulties arise
  → reinforce the importance of boundaries with befrienders and clients in a variety of ways, eg:
    › individually with clients during their assessment
    › with befrienders at interview and in training
    › with both parties at matching meetings
    › in project literature
    › during support and supervision
    › during Reviews
  → be aware that if boundaries are becoming progressively blurred within a match, this may be one of the indications that a genuine friendship is developing between the befriender and client and it may be time for the project to consider ending its involvement [see “Endings” p62]

Suggestions:
» Ask befrienders and clients to sign a simple written Befriending Agreement (which can be referred to during Reviews and when resetting altered boundaries) which outlines:
  › what the project expects from both parties during befriending meetings
  › the type of befriending activities which are appropriate
» Write guidelines / statements to explain expected working practices for befrienders [see “Boundary Guidelines” below].

Boundary Guidelines

Projects should consider writing guidelines and appropriate case studies on the following potentially difficult areas and use them to: inform referrers and clients, as a part of volunteer training; and during befriender support and supervision. These guidelines should also be included in the volunteer handbook.

Time
  → the minimum length of commitment expected from volunteers (eg one year)
  → how often meetings should take place (eg weekly)
  → the approximate length of each meeting (eg three hours)
  → whether travel, supervision and training time are extra to, or part of, this basic commitment
how inevitable interruptions to befriending relationships (eg by holiday / illness) will be handled (eg
will the project offer temporary staff support / an alternative match?) and what notice should be given

**Personal Details**

→ whether or not befrienders should give their contact information to clients
→ if befrienders are encouraged not to give out their details, how the project will facilitate the
  arrangement of meetings
→ if befrienders can give out their details:
  › what the possible implications are
  › at what stage in the relationship it is appropriate to do it
  › what limitations they should put in place (eg suitable and unsuitable times to call)
  › whether befrienders should inform the project when they do so
→ whether it is appropriate for there to be an imbalance in the information shared between befrienders
  and clients (eg the befriender has the client’s contact number or home address but not vice versa)

**Involvement of Friends and Relatives**

Befrienders:

→ whether it is acceptable for clients to be introduced to the befriender’s friends and relatives - this can
  widen the client’s circle of social contacts but also:
  › moves the relationship away from the principle of 1:1
  › introduces people who have not been selected or trained by the project [see “Safety: Other
    People” p27]
  › can compromise safety - for example if there is an accident the befriender’s is likely to focus on
    the welfare of their family rather than the client [see “Safety: Other People” p27]
  › may cloud confidentiality issues [see “Confidentiality” p60]

Clients:

→ to what extent should befrienders become involved with the friends and relatives of clients - this can
  be positive (and may be the aim for family befriending projects) but:
  › the befriender may find themselves providing support to more than one person
  › the service will move away from the original aim of a 1:1 relationship
  › projects need to be prepared to offer guidance and practical suggestions to prevent these
    problems arising and to deal with them promptly if they do

**Role of the Befriender**

→ what areas of support are not the befriender’s responsibility
→ what tasks befrienders are expected to get involved in [see “What is a Befriender” p36]
→ what tasks are not appropriate for the befriender to do (eg babysitting, taxi service, home help)

Referral agencies should be given clear information on this to encourage more appropriate referrals [see
“Referrals” p48]. Clients also need this information to ensure they understand the nature of the relationship
in advance.

**Location**

→ where befrienders and clients should meet each other – relationships develop better in places which:
  › make both parties feel safe, comfortable and happy
  › are mutually suitable
  › are accessible to both people
  › provide appropriate privacy (if confidential issues are likely to be discussed)
→ the importance of both people feeling free to say if they are unhappy with where they are meeting
  [see “Safety: Locations and Activities” p27]
Finance

- loans between befrienders and clients
- handling money on behalf of the client (e.g., withdrawing money from cash machines)
- befrienders regularly paying for the client’s activity
- gifts (projects may want to impose a value limit and/or restrict these to appropriate cultural occasions and/or birthdays)

Without boundaries money issues can easily have serious implications for the befriending relationship, including bad feeling, dependency and exploitation.

Illegal Activities

- what procedures befrienders are expected to follow if they encounter illegal activities while befriending, including:
  - statutory reporting responsibilities (e.g., regarding child abuse) [see “Protection of Children / Vulnerable Adults / Vulnerable Groups Policy” p24]
  - responses to other illegal activities which may be witnessed or discussed (e.g., drug-taking)

Alcohol

- whether or not befrienders and clients can drink alcohol during the time they spend together and, if so, how much
- whether specifically going out for a drink together (as opposed to having one as a small part of another activity) is acceptable
- what action the befriender should take if the client is drunk when they meet or becomes drunk during the time they spend together
- what action the befriender should take if the client’s parent / carer / guardian etc appears to be drunk
- what action the client should take if the befriender is / becomes drunk

Case Study:

One project which works with young adults specifies that befrienders and clients can go to the pub in order to take part in a specific activity (e.g., to play pool, do a pub quiz, or join in a karaoke evening). While they are together the client is allowed to have one alcoholic drink, however the volunteer must not have any. If the client decides to have a second drink the meeting must end.

Intimate / Sexual Relationships

- volunteers should be aware that vulnerable, isolated people may be susceptible to misinterpreting why they are receiving regular, voluntary, 1:1 attention
- the development of a match into a romantic or sexual relationship is absolutely unacceptable
- what action the project would take if such a relationship developed, or if it became apparent that one person within the match wanted it to [see “Disciplinary Policy” p22]

Feedback to Referrers

- what the project’s boundaries are in relation to providing feedback on befriending to other agencies [see “Referrals” p48 and “Referral Agencies” p52]

Potentially Difficult Boundaries to Manage
Suggestions:
» Define the befriender’s role clearly (in writing) to everyone involved from the start. S&CP
» Define specific boundaries within the befriending relationship clearly to all involved. GP
» Provide guidelines to cover situations commonly experienced by befrienders and include these in the Volunteer Handbook. GP
» Ensure befrienders are aware of their responsibility to work within the project’s guidelines. S&CP
» Make “boundaries” an integral part of introductory training for volunteers. S&CP
» Use befriender Support and Supervision as a time to review boundaries. S&CP

Changes to Boundaries
Boundaries inevitably change over time and it should be remembered that such changes are often positive (eg due to an increase in trust). A change may result in the need to establish new boundaries - for example if the befriender and client decide to exchange phone numbers, the project may need to help them agree at what times it is acceptable for them to ring each other.

If there are significant changes in the client’s circumstances (eg in relation to health, family situation, or a need for extra support), the boundaries may change outwith expectations and the befriender should be given the choice about whether or not to continue the befriending relationship. If boundaries change to the detriment of the relationship / people involved, the project should renegotiate these boundaries with both parties, where possible. If no satisfactory resolution can be found (from everyone’s point of view), the relationship should be ended sensitively [see “Endings” p62].

Suggestion:
» Project staff should continue to explore each match’s boundaries during befrienders’ support and supervision sessions and in clients’ Reviews. S&CP

Confidentiality
Confidentiality is an important issue for befriending projects because:
→ the project may have access to personal information on staff, befrienders and clients
→ clients may tell their befrienders about sensitive issues

Each project should therefore have a clear, written Confidentiality Policy in order to protect the best interests of staff, befrienders and clients [see p21]. S&CP Every breach of confidentiality must be investigated, and action should be taken to educate and/or discipline those involved in accordance with the project’s Disciplinary Policy [see p22].
Length of Relationship

Befriending services fall into one of three categories - they offer fixed-term, open-ended or successive befriending relationships. There are distinct advantages and issues associated with each type and some client groups may tend to suit one more than the other.

Fixed-Term Befriending

This type of service makes it clear from the beginning to all parties involved that the befriending relationship will only be supported by the project for a set period of time, typically one or two years.

Advantages

→ both the client and the volunteer can be more motivated to make the most of the opportunities the match gives them
→ the end of the relationship tends to be easier to manage - it is imposed on all relationships by the project so neither the client or volunteer is as likely to feel rejection, and it can be easier to make endings seem like a celebration of achievement rather than a failure
→ it can be easier to recruit volunteers for a fixed term commitment (though obviously they can go on to be matched with another client if they want to continue volunteering)
→ waiting lists are kept shorter and the project can provide its service to a larger number of people over a period of time

Typical Project Types

→ restricted age range (eg children in transition between primary and secondary school)
→ those with a more goal-orientated focus [see “Befriending v/ Mentoring” p12]

Open-Ended Befriending

In this case (the most common type of provision), a befriending relationship continues for as long as the client, their family/carers (if appropriate), the volunteer, and the project all agree that it should. Some projects are explicit that they will regularly review whether or not each match should continue (eg those which are more goal-focused may support matches on a rolling six month basis). Others tend not to consider ending a befriending relationship unless one of the parties involved has indicated that they want it to stop, or the match has evidently developed into an independent friendship which no longer requires the project’s support and supervision [see “Setting the Boundaries with Befrienders and Clients” p57 and “Endings” p62].

Advantages

→ the befriending relationship can develop slowly, building trust without any time pressures
→ clients who may need many months to start to get the most out of their befriending relationship are given the opportunity to maximise the benefit they receive
→ people who are likely to continue to be socially isolated can receive ongoing support (perhaps for the rest of their lives)

Typical Project Types

→ those whose clients’ social isolation is likely to persist (eg if they are house-bound)
**Successive Befriending**

A few projects recognise the need for ongoing support for their clients (perhaps throughout their lives), but feel that this is best provided via a series of time-limited matches with different befrienders.

**Advantages**

- increased social contact
- a range of activities
- avoidance of dependency

**Typical Project Types**

- those who work with younger people whose social isolation is likely to persist (e.g., people with learning disabilities)

**Beginnings and Endings**

It is important for Project Coordinators to think carefully about how to handle both the beginnings and endings of befriending relationships - acknowledging the potential stresses involved in each. The successful handling of beginnings gives relationships the best chance of success, and the sensitive management of endings can ensure that both clients and volunteers view the times they had together positively and celebrate their achievements rather than dwelling on the end itself as some kind of failure or negative development.

**Beginnings**

The way in which a relationship starts often sets the tone for what is to follow. Staff must be sensitive to this, monitor how the match is developing and provide the necessary support. Early on, befrienders and clients may require more reassurance from the project in order to build their confidence and staff should be aware of the possibility of teething problems.

At the beginning of each befriending relationship both the befriender and the client will be aware that there is the potential for rejection. It is therefore inevitable that both the befriender and client will be a bit anxious or nervous at the beginning, and it is common for both people involved to worry that the other person may not like them.

**Suggestion:**

» Give each relationship a trial period (e.g., three or four meetings) with a high level of support from the Project Coordinator and then use a formal Review to allow both the befriender and the client to comment on the suitability of the match.

**Endings**

Well-managed endings for befriending relationships are also extremely important. Unless dealt with appropriately and positively there is the potential to undo a lot of the good work achieved throughout the match.

Endings are potentially very difficult because they can evoke a range of intense (and possibly conflicting) emotions for everyone involved, including:

- loss, sadness, grief → relief
- fear → guilt
- failure → achievement
It can be particularly difficult when the client and befriender have very different reactions to the end of the relationship. For example, one person might be feeling (guilty) relief, while the other person is grieving for the loss of the relationship. It should be remembered that volunteers can potentially feel the loss of a befriending relationship just as much as clients, and will be responding to the client’s feelings as well as their own. They should therefore be offered extra support at this time.

However, endings can also often be a reason to celebrate and to look forward to the future, especially if the relationship has been successful and has achieved some of its aims, for example enabling an individual “to move on”, or if the match has developed into a genuine friendship and both people feel they no longer need the project’s input.

Signs that an official match may be nearing its end include:

- the befriender sees less need for support and supervision sessions
- the befriender submits fewer reports
- meetings take place less often
- the link between the people involved is stronger than either person’s link to the project
- the befriender and/or the client is reluctant to take part in Reviews
- boundaries have shifted significantly and are no longer determined by the project

**Suggestions:**

- Acknowledge explicitly to both the befriender and the client that endings can be difficult and allow them to express the range of feelings they are experiencing.

**Planned Endings**

Ideally, endings should always be planned in order to give all parties sufficient time to:

- deal with the emotions involved
- reflect on what the relationship has meant for them
- plan for the future

**Suggestions:**

- Make the importance of planned endings explicit to volunteers during their training. S&CP
- Reinforce the importance of planned endings during Support and Supervision. S&CP
- Ask both clients and befrienders to give the project a minimum period of notice (eg four weeks) before ending their involvement, if possible.
- Work towards planned endings by helping befrienders and clients identify what has been successful about their relationship.
- Encourage the befriender and client to mark their last meeting with a special ‘celebration’ or event, if appropriate.

**Unplanned Endings**

Occasionally the befriender or client may terminate the relationship without notice. An abrupt ending by the befriender may be experienced by the client as rejection, abandonment or even punishment, particularly if the befriending relationship has been one of their few experiences of building up trust. It is crucial that any such feelings are recognised and responded to. Similarly befrienders may feel very rejected, start doubting their ability and be put off volunteering in the future if their client decides to end the match without warning. Project Coordinators should act quickly to offer support to both people involved in these circumstances.

In exceptional circumstances the project may have to terminate the relationship for the welfare of either person. Such circumstances must be carefully managed.

Sometimes the relationship will be ended by the death of the client (or, less commonly, of the volunteer). Some projects are likely to have to deal with this more frequently than others (eg if its clients are elderly or seriously ill).
**Suggestion:**
- If the project is particularly likely to have to deal with bereavement, provide training for volunteers on coping with bereavement and for staff on supporting the bereaved.

**Case Study:**
- One project for elderly people holds an annual Remembrance Event for befrienders whose clients have died during the course of the year.

**Decision to End**
Ideally endings should be a mutual decision between the befriender and the client. Staff can use befriender Support and Supervision [see “Supporting and Supervising Befrienders” p44] and client Reviews [see “Keeping People Informed: Clients: After Matching” p52] to help both parties reflect on and evaluate the purpose of their relationship. It is important not to let relationships “drift” on through an unhealthy dependency, or simply because broaching the notion of ending feels uncomfortable.

Once the match does end it is important that a written statement is sent to both parties (and the referral agency, where appropriate) clarifying that the project is no longer accountable for the relationship. It is important to help both the client and the befriender explore their motivations and expectations if they decide they want to keep in contact with each other after the official match has ended.

**Suggestions:**
- Do not ignore any signs that the relationship has run its course.
- Recognise that some individuals may find endings and the associated feelings particularly difficult.
- Make it clear from the start to everyone involved that the project has the right to end the formal relationship in particular circumstances.
- Once a match has ended, write to everyone involved (client, carers/family, befriender, referrer) stating that the project is no longer accountable for the relationship. S&CP
- If either the befriender or client leaves without notice, ensure that appropriate support is provided to the individual who has been let down. S&CP
- Ensure that both parties fully understand what the end of their match means and ask them to sign an Ending Agreement which spells out the implications of no further project involvement in any future meetings (ie: no insurance, no expenses, no project responsibility). S&CP
- Think about what information to give to referral agencies after matches end, eg a summary of the befriending relationship and its achievements.
- Ask the client and befriender if they’d like to be kept on the project’s mailing list to receive project newsletters etc.
Section 6 - Appendix

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Staff:Befriender Ratios Outline p71
Useful Websites p72
About Befriending Network Scotland p73
Other BNS Resources p76
Index p78
Acknowledgements p82
Checklists

Not every project will need to have all of the policies, printed materials or forms listed here (and this list is not exhaustive), however it is worth making a conscious decision about whether or not to have each one. Use the checklists to note whether that item is in place already, whether it is needed, and when it is due for review. Other relevant documents can be added at the bottom of each checklist. There are samples of many of these materials available to download from the resources section of the BNS website: www.befriending.co.uk
### Policies Checklist

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### Project Documentation Checklist

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- ✓: In Place
- ☐: Not In Place
- yes: Needed
- no: Not Needed
### Forms Checklist

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# Befriender Training Topics Checklist

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### Staff:Befriender Ratios Outline

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[See “Staff:Befriender Ratios” p19 for a more detailed discussion of the issues surrounding the number of matches that can be supported by a member of staff.]
Useful Websites

**Charity Governance & Regulation**

→ www.scvo.org.uk  
→ www.oscr.org.uk  
→ www.charity-commission.gov.uk  

**Funders**

→ www.biglotteryfund.org.uk  
→ www.charityfacts.org  
→ www.esmeefairbairn.org.uk  
→ www.funderfinder.org.uk  
→ www.ltbfoundationforscotland.org.uk  
→ www.philanthropycapital.org  
→ www.therobertsontrust.org.uk  
→ www.tudortrust.org.uk  

**Government**

→ www.europarl.eu.int  
→ www.scotlandoffice.gov.uk  
→ www.scotland.gov.uk  
→ www.scottish.parliament.uk  

**Media**

→ www.bbc.co.uk  
→ www.mediatrust.org  
→ www.scotsman.com  
→ www.theherald.co.uk  
→ www.pressandjournal.co.uk  
→ www.thecourier.co.uk  
→ www.thesouthernreporter.co.uk  
→ www.society.guardian.co.uk  
→ www.thirdsector.co.uk  
→ www.volunteergenie.org.uk  

**Personnel**

→ www.cipd.co.uk  

**Useful Statistics**

→ www.hps.scot.nhs.uk  
→ www.isdscotland.org  
→ www.statistics.gov.uk  

**Volunteer Awards**

→ www.beaconfellowship.org.uk  
→ www.leagueofmercy.co.uk  
→ www.volunteeredinburgh.org.uk  
→ www.vds.org.uk  
→ www.youngachievers.co.uk  

**Volunteer Management**

→ www.vds.org.uk
About Befriending Network Scotland

Many befriending projects are small and can also be geographically isolated. Those running the projects therefore find value in meeting to exchange information and experience, as well as to work together to develop good practice. In addition, new projects are usually developing in ways which are similar to projects which have been existed elsewhere so it can be of great value for them to have access to a body of experienced practitioners.

Befriending Network Scotland [BNS] has been providing information, training, support and networking opportunities for new and established befriending projects since the late 1980s, helping projects develop effectively and efficiently.

Befriending Network Scotland also plays a developmental role for befriending projects by producing resources and setting guidelines for good practice.

Befriending should be a positive experience for everyone involved. As the umbrella organisation for befriending, Befriending Network Scotland's purpose is to ensure that this is the case by providing the information, training and support to encourage befriending projects to exchange experience and develop good practice.

Befriending Network Scotland Ltd is a registered charity and a company limited by guarantee.

BNS Staff

Currently BNS has five part-time members of staff:

→ **Mike Nicholson** - Development Manager
→ **Samantha Rospigliosi** - Information Officer
→ **Susan Gilchrist** - Training Officer
→ **Martha Lester-Cribb** - Quality Officer
→ **Alison Chapman** - Administrator

BNS Services
**Annual Conference**
Every autumn BNS holds a national conference based on a topical befriending theme. The day is underpinned by theoretical input from a keynote speaker and there is the chance to discuss how the theory applies to each client group in practice. Relevant case studies from member projects are also often presented. Conference notes can be downloaded from the BNS website: [www.befriending.co.uk](http://www.befriending.co.uk). Topics have included:

- Befriending and Wellbeing (2009)
- Friendship and Befriending (2008)
- Befriending and Resilience (2007)
- The Future Direction of Befriending (2006)
- Challenging the Principles of Befriending (2005)
- Befriending and Funding (2004)
- Befriending and Self Esteem (2003)
- Befriending and Volunteer Motivation (2002)

**Common Ground Meetings**
Common Ground meetings are relaxed, informal, friendly, informative, stimulating and challenging discussions which are central to making BNS a strong, inclusive, dynamic network. These meetings allow befriending staff to meet others involved in befriending projects locally, discuss and explore two topical issues around befriending at each meeting, and contribute to good practice in befriending at a national level.

Common Ground Meetings typically take place three times a year in the spring, summer and winter and are held in Edinburgh, Falkirk, Glasgow, Dundee, Newcastle and Aberdeen. There is also one in an additional location each time and a teleconference version for those who can't attend in person. Meetings around the country feature the same agenda items but also allow time for local issues to be raised. Notes are compiled from each round of meetings and distributed to all members.

**Consultancy**
Since 2002 BNS has supported organisations in their day-to-day work by providing a variety of short- and long-term consultancy services, including:

- Project Evaluations
- Feasibility Studies
- Organisational Reviews
- Publication Writing
- External Supervision for Managers

Befriending Network Scotland staff manage the consultancy, with input from different staff members depending on the nature of the project. In addition, there is a wider team of consultants who are called in for specialist work such as face-to-face interviews with befrienders and befriendedees or survey design and analysis.

**Newsletters**

- *NetGain* - a quarterly twelve-page newsletter for befriending organisations, including members' experiences and topical issues in befriending
- *The Befriender* - a quarterly four-page newsletter for befrienders which contains project news and befriender diaries together with unique insights into what it really means to be a befriender
- *E-Newsletter* - a quarterly e-news digest which covers the latest developments in the sector and is sent to members and key stakeholders, including funders
Training

Vital Skills in Befriending [VS] [previously called "Core Skills in Befriending"]

BNS has identified vital skills needed by befriending workers in nine key areas:

→ Training for Trainers → Boundaries → Managing Waiting Lists & Endings
→ Recruitment & Selection → Matching → Monitoring & Evaluation
→ Support & Supervision → Risk Management → Project Development

Each of these vital skills is covered in a half day training session, with the exception of Training for Trainers which is a full day session - the entire course therefore takes five days to complete.

Members can choose to cover all nine skills in a year, spread them over a number of years or just pick and choose the topics that interest them the most. The notes and handouts that accompany each session build up into a Vital Skills in Befriending Handbook for workers.

Those who successfully complete all nine sessions receive a BNS Vital Skills in Befriending certificate. The course is designed to be a comprehensive grounding for new workers and a refresher for more experienced workers. The course has now been credit-rated on the Scottish Credit and Qualifications Framework (SCQF) by the Scottish Qualifications Authority. Each of the nine course elements carries an individual credit rating which participants can achieve on the completion of a practice-based assignment. Alternatively, participants who successfully complete all nine assignments will gain the full course credit rating of 34 points at SCQF level 8 (comparable to HND or SVQ level 4).

Developing the Leader

All projects have managers but not all have leaders. The "Developing the Leader" course not only defines the roles and activities of leaders, it teaches the skills required to lead effectively. This series of three training days is for anyone who has been in befriending for a few years and is seeking to develop on both a personal and professional level. It also ideally suits those people who have completed the "Vital Skills in Befriending" course and are looking for the "next stage". The sessions can be taken individually or, ideally, as a set.

Action Learning Set

One of the main complaints of experienced befriending coordinators is that they don’t have anyone with whom they can explore, develop and reflect on their work. This course allows such people to participate in five peer support/action learning sessions. Action Learning is an accelerated learning tool which is ideally suited for people with three years' experience in befriending, those who have participated in the Developing the Leader course, and those who are keen to stretch and challenge themselves in a supportive, well-facilitated environment.

Complementary Skills

Each year BNS offers two courses which explore specific types of befriending, eg: home visiting, telephone, or group befriending. There is also a need for client-group-specific training and each year BNS aims to offer two courses which reflect this, eg: Mental Health and Recovery, Children and ADHD [Attention Deficit Hyperactivity Disorder], Older People and Dementia. There are an additional four courses each year which relate to topics identified by members, respond to a change in government policy, or explore a new theoretical approach.

Bespoke Training

BNS can design and deliver training to fit any project’s requirements. As well as accepting one-off commissions, BNS has a large selection of off-the-shelf training packages which can be adapted as required, including:

→ Support and Supervision → Interview Skills
→ Recovery in Mental Health → Managing Challenging Behaviour
→ Boundaries in Befriending → Motivating Staff and Volunteers
→ 1:1 Training → Groupwork
→ Risk Management → Soft Outcomes
Website

The BNS website contains a wide range of resources and information including:

→ **Befriending Resources A-Z** - more than 350 free befriending-specific articles, policies and guides
→ **Membership** - join or renew online, pay by card or request an invoice
→ **Online Discussion Forum** - the opportunity for members to ask questions, share experiences and good practice, and make contact with others in similar positions
→ **Publications Store** - download or buy the latest befriending publications and resources [see “Other BNS Resources” p76]
→ **The Scottish Befriending Directory** - a searchable map of all BNS members and their contact details
→ **Training & Events** - find out what’s available and book online
→ **Quality Standards** - find out which projects have achieved a befriending-related quality standard and how to apply

Project Insurance

BNS is working with insurance brokers WH & R McCartney to promote Markel’s Community Group Insurance. It is hoped that this product can accommodate common elements of befriending practice (e.g. lone working) at reasonable premiums (some projects have faced significant rises in insurance costs recently because of perceived risks about their work, despite their commitment to good practice). McCartney’s [see www.whrmccartney.com] have agreed to donate 20% of fees generated from the sale of Community Group Insurance policies to BNS if projects mention Befriending Network Scotland when taking out their policy.

Other BNS Resources

Please visit the BNS website: www.befriending.co.uk for up-to-date price lists and to order / download these resources.

**Evaluation Resource Pack for Befriending and Mentoring Projects** - free

Research showed that projects often struggle with monitoring and evaluation and so this pack was commissioned by BNS, the Scottish Mentoring Network and Evaluation Support Scotland to help projects undertake these processes for themselves. The pack provides a five step outline of the evaluation process:

→ What is the difference you are trying to make?
→ How will you know when you get there?
→ Gathering evidence
→ Analysing the evidence and learning from evaluation
→ Reporting

and includes views from funders, case study examples, resources, tips and summaries.

**Square One - Developing a New Project**

Organisations or individuals which are considering developing a befriending project need information on the practicalities and issues involved. Square One provides practical information and suggestions for the early stages of planning befriending, and helps potential projects ask important questions. Careful planning not only makes the development of befriending smoother for those involved in the work, but ultimately helps to ensure that the experience for befriending and clients is a positive one.
Training Toolkit

This A4 loose-leaf folder contains a curriculum with handouts for use when training volunteer befrienders. Topics include:

- Befriending
- Building Relationships
- Communication & Listening Skills
- Boundaries & Confidentiality
- Attitudes & Values
- Endings
- Support
- Evaluation
- Beyond Training

The Distance Training Pack: How to Train Your Home-Based Volunteers

This innovative training resource, developed by Befrienders Highland, offers a very useful alternative to face-to-face training. Consisting of six different workbooks, the pack covers key elements of befriending and each workbook can be completed at home, at the volunteer’s own pace with staff back-up support provided by telephone. Originally developed to support a group of distance befrienders working with people with mental health problems, the workbooks can be easily adapted to fit any client group. They have been thoroughly tested and include a wide variety of entertaining and informative exercises.

Quality of the Moment: Befriending & Dementia Training Toolkit

Although the vast majority of befriending is done by volunteers, the vast majority of befriending is supported by dedicated professional workers who recruit those volunteers, assess the needs of the clients, put the matches together and support the matches as they progress.

BNS learned that befriending staff at older people’s projects did not feel properly equipped to train their befrienders in working with clients with dementia. This training pack is an attempt to plug that gap and give befriending staff the tools they need to prepare their volunteer befrienders for the challenges and the rewards of this valuable work.

Videos / DVDs

Changing Lives: A Video / DVD Training Resource

“Changing Lives” is a 15-minute video training resource which follows the progress of three very different befriending relationships, each from a different project: one which works with young people, one with adults, and one with the elderly. The video introduces those new to befriending to real-life situations and examines key issues including the secrets of successful matching, boundaries, attitudes and confidentiality. It also looks at what befrienders and befriendees gain from their befriending relationships. The video (which is designed to complement the Training Toolkit) is accompanied by comprehensive training notes and activity suggestions.

What do Mentoring and Befriending Mean to You: A DVD Training Resource

This 20-minute film presents the views of five matched pairs and brings to life the unique relationships that lie at the heart of mentoring and befriending. In the film, the distinction between mentoring and befriending may not always be apparent. This reflects the reality for some relationships and some services.
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Thank you to everyone who has contributed in any way to the development and production of this Befriending Code of Practice.
"The new BNS Code of Practice is so good that, if you were not already involved in befriending, you would want to go out and start a project right away! It combines ease of reading with a level of advice that is of a quality that could only come from an organisation that really knows about befriending. Laced with useful case studies, practical suggestions and links to helpful BNS resources as well as other websites, the Code of Practice covers all you need to know about how to run an effective, efficient and ‘best practice’ oriented befriending project."

David Shipley
Volunteering Development Manager
Age Concern Newcastle

“I am not aware of another code of practice for befriending services which is comparable to this one in terms of the level of detail and its professional presentation.”

John Nicholls
Independent Consultant