Working Together to Promote Good Practice in Befriending

Code of Practice

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The Code of Practice - Working Together to Promote Good Practice in Befriending

Foreword

Befriending Network (Scotland) has existed since May 1999, formed from the charity SBDF which had provided a forum for befriending projects since 1993.

The membership of Befriending Network (Scotland) reflects the diversity of befriending schemes, and members share a common aim in supporting the development of good practice in befriending.

Befriending agencies are responsible and accountable for the work that they undertake. Members therefore aim to work in ways that ensure the provision of safe, reliable and effective befriending. In response to national requests for advice and guidance from a wide variety of organisations and from members, it was decided in 1994 to form a Steering Group to produce a Code of Practice for the membership. Since then the Steering Group has been involved in the ongoing process of writing this document, presenting new sections to members and seeking feedback through consultation. This Code of Practice is therefore a document which has taken into account views expressed by members of Befriending Network (Scotland).

The Code of Practice Steering Group recognises that not all Befriending Network (Scotland) members will necessarily use the same terminology as is used in this document. The importance lies in the quality of the practice, and not how each organisation chooses to describe it.

The Code of Practice should be seen as a set of recommended standards and guidelines which befriending projects can use as a mechanism to influence and develop their practice. Befriending Network (Scotland) therefore asks all of its members to use the code as a basis from which they can work towards developing good practice in all aspects of their work.
Acknowledgements

Befriending Network (Scotland) would like to thank and acknowledge the support of the following individuals and their organisations who have contributed to the production of this document over the years:

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1 Introduction

This Code of Practice is intended to act as a reference point for all current befriending projects and any future schemes.

It starts with the premise that befriending is a service offered to a range of people recognised as having particular needs. As such, all befriending projects must be very clear about what befriending actually involves, acknowledge the need for accountability and be able to identify standards of good practice.

2 Definition of Befriending

Befriending is a relationship between a volunteer and a recipient which is initiated, supported and monitored by a voluntary or statutory agency.

Throughout this document the recipients of befriending are referred to as ‘befriendees’. The agencies are referred to as ‘projects’.

3 Aim and Purpose of Befriending

The aim of befriending is to enhance the quality of a befriendede’s life by supporting and promoting his/her welfare, personal development and capacity for self-determination. This is done by offering the befriendee an opportunity to form a trusting relationship, which may enable him/her to:

- develop a greater degree of self confidence and emotional growth
- develop greater capacity to make use of their own personal resources
- develop greater capacity to form and maintain relationships with others
4 Definitions and Differences

Befriending and Friendship
It is important to make a clear distinction between befriending and friendship. It is also important to make a distinction between the meaning of the word "befriending" as it might occur in everyday usage ("being a friend to") and the meaning of befriending as it occurs in a befriending service.

Friendship is a private, mutual relationship. Befriending is a service.

Voluntary Befriending and Paid Befriending
A number of befriending services pay individuals on a sessional basis to act as befrienders. The majority of befriending services involve volunteer befrienders. There is a range of opinion within the befriending field on the issue of whether paying volunteers affects the nature of the relationship. Some believe that paid befriending relationships are inherently the same as unpaid befriending relationships. Others believe that an essential core to the befriending relationship is the voluntary element. In both cases, however, the same underlying principles should apply.
5 Equal Opportunities

Equal Opportunities is about recognising that particular groups in our society are discriminated against - both at an individual and an institutional level. This can for example be on the grounds of race, gender, sexual orientation, disability, class etc.

Befriending offers a service to a range of people, many of whom are disadvantaged for a wide variety of reasons. All schemes have a responsibility to recognise the effects of discrimination and disadvantage, and to ensure that they work actively to combat them.

This means therefore that it is not enough to say; "we treat everyone the same", because everyone is not treated the same, or treated equally by our society. For befriending groups it means they must take this into account and ensure that they are providing a service that is accessible and relevant to all.

For example, paying particular attention to the recruitment, training, selection and support of befrienders. Projects should ask themselves the question – “What positive steps are we taking to ensure the recruitment of volunteers from under-represented groups?”

Good practice in Equal Opportunities depends not only on having a sound Equal Opportunities Policy, but on having the commitment to implement it effectively.

*(Befriending Network (Scotland) produces a separate Equal Opportunities publication)*
6 Resources Required for a Befriending Project

In planning a befriending project it is imperative to consider the resources available in order to set realistic and achievable targets. Nationally there exists a large body of experience regarding the nature of tasks involved in co-ordinating befriending work. From this experience, specific resources and levels of work which allow for good practice to be developed, can be recommended.

"Good practice" means a project which:

- supports its befrienders through training, supervision, expenses and other means
- provides the best service and protection for the befriendees it aims to work with
- supports the co-ordinator of the project both professionally and personally

Human Resources

Because of the varied and responsible tasks in recruiting, training and supporting befrienders, it is recommended that projects employ Project Co-ordinators in posts dedicated to this work. This can involve employing one or more people, and can also work well in a job share arrangement.

Person Specification of a Befriending Project Co-ordinator

The varied nature of tasks within the remit of a Befriending Project Co-ordinator require that the person specification for this post should seek an individual who is adaptable and versatile. In addition there are certain core skills which Management Committees or potential employers should consider when deciding on the most suitable person to co-ordinate their project. These are:

- Good communication skills across a wide variety of settings:
  - 1 : 1 with both befrienders and befriendees in interview and support situations
  - group settings - training / group support
  - networking - with referrers / professionals working in the same field
- Understanding of the befriendees involved
- Understanding of the potential effects of befriending on the befriendees
- Understanding of the nature and need for supervision
• Awareness of boundary issues relevant to the befrienees

• Skills in:
  ⇒ Recruitment
  ⇒ Assessment
  ⇒ Training
  ⇒ Organisation

**Additional Tasks in Befriending Projects requiring Human Resources**

As well as determining the staffing levels needed to co-ordinate the work involved in recruiting, training, matching and supporting any targeted figure of befrienders and befrienees, consideration should be given to the administration and fund-raising for the project.

**Recommendations**

Projects should be supported in the areas of administration and fund-raising by additional staff, and financial resources therefore budgeted for and made available.

If this is not the case then it should be recognised that these areas demand an additional set of skills from the Co-ordinator, and will add a significant number of hours to any job. This in turn will reduce the amount of work which can be done directly with befrienders and befrienees.
Financial Resources

Recommendations
In addition to funding for staff, financial resources be provided for the following areas of support:

• Befrienders’ training
• Befrienders’ expenses
• Publicity
• Training for Project Co-ordinator / Staff
• Supervision for Project Co-ordinator*

*It is essential that staff who are expected to support and develop relationships between potentially vulnerable befriendedes and befrienders of various backgrounds, are themselves given support personally and professionally through supervision and training.
It is important that both the Co-ordinator and Management Committees / employers have access to specialist knowledge, to advise on areas which are outwith their own expertise.

Ratio of Staffing Levels to Matched Befrienders

The quality of any befriending project and the quantity of work it can undertake will be directly affected by the financial resources made available for staffing and support. In developing a project it is therefore vital to consider realistic targets which are achievable with the resources which are to be made available.

Recommendations
In this document the levels of work involved in supporting staff, befrienders and befriendedes have been stated. Based on this it is recommended that:

1 full time staff member can support 15-20 matched befrienders

(NB This figure is based on administrative support being available and will therefore vary depending on the resources provided as described above).
7 Role and Task of a Befriender

Within an Organisational Framework

Befrienders are in a unique position of trust offering support, in a caring and responsible way, as part of a service, and being accountable to the projects managing their work.

The Role of the Befriender is:

A consciously undertaken commitment and responsibility by an individual, who has gone through a process of recruitment, selection and training. Their work is monitored, supported and supervised within the policy framework and guidelines of the project.

Within the Befriending Relationship

The role of the befriender is to offer the befriendedee an opportunity to form a relationship of trust with an acceptable and understanding person who is reliable, consistent and dependable.

The Task of a Befriender

The task of a befriender is varied and complex, with additional considerations unique to individual circumstances. The following statements are associated with the befriender's task:

- to build up a relationship
- to establish and maintain appropriate boundaries to the befriending relationship
- to be aware of, and to work within, the project’s framework
- to spend time/share activities with their befriendedee
- to offer an accepting and understanding presence
- to be consistent
- to be accountable
- to respect confidentiality within the service's framework
- to acknowledge positive qualities and skills
- to help the befriendedee to feel relaxed and secure
- to clarify issues and report back to project staff
- to co-operate with administrative tasks
- to work within a non-discriminatory framework
8 Befriender Person Specification

Based on the tasks required by organisations working with a whole range of befriendees, there are a number of common key qualities, values and abilities which should be looked for in prospective befrienders.

This list is not an exhaustive one, however these are some of the properties that volunteers require in order to carry out their tasks as befrienders. It should be noted that different projects may require the following to be either "essential" or "desirable".

Personal Qualities

• Warmth, an ability to engage in relationships
• Good communication/interpersonal skills (individual / group issues)
• A level of self awareness  e.g. impact of loss
• An ability to reflect on the befriending relationship
• An ability to work on own / use initiative / common sense
• Some insight into the potential significance and importance of the relationship
• Reliable, consistent, dependable
• An ability to handle a level of stress
• A balanced approach / awareness of own needs in befriending work
• A capacity for empathy and understanding
• Willingness to question own assumptions

Personal Values

• Accepting a person for who they are
• Respecting others as being of equal worth
• An ability to respect others choices / lifestyle / rights etc. - self determination
• No imposing own values and belief
• An ability to appreciate differences / race / gender etc.
Organisational Skills

• A commitment to work within organisational boundaries
• An ability to work within personal boundaries
• An ability to make use of training
• An ability to make use of support and supervision
• An ability to work within a project’s confidentiality policy

9 Befriender Assessment & Selection Process

The selection process will usually involve several stages and will vary between projects, depending on their chosen policy and practice. In order to assess a potential befriender's appropriateness for befriending work, selection will most commonly comprise a combination of:

• Initial contact with the project
• An application form, including a request for references
• An initial selection interview
• An introductory training course
• A final selection interview on conclusion of training course
• An early review once matched

Information

Prior to making an application the prospective befriender will need to know exactly what they are applying to do. They will need to have information on:

• the project, its aims and objectives
• the befriendees and why befrienders are needed
• the level of commitment involved in befriending, training and supervision
• the level of support available to befrienders on a 1 : 1 basis and / or in a group setting
• the various processes involved which lead to selection and 'matching'
• expenses
• details of any volunteer agreement

This information may be provided by:
• an informal meeting
• telephone contact
• printed literature

All methods have advantages and disadvantages and each project will have to decide which are the most practical and appropriate for them.

**Application**

Any initial contact with a potential volunteer, while providing information to them, will also begin to inform the project about the applicant's suitability for the work.

Application forms are necessary because they:
• formalise the selection process
• provide a record of personal details such as name address, age, occupation
• provide a personal statement of why the applicant wants to befriend and what they can offer
• provide names and addresses of referees
• give signed permission for police screening where appropriate

Each project has a responsibility to produce its own criteria for assessment, recruitment and record-keeping.

*For information on the use of police checks as a means of assessing volunteers, we recommend consultation of the publication 'Protecting Children'- Volunteer Development Scotland (VDS), Stirling, Scotland.*
**References**

**Purpose**
References offer 'third party' perspective on the applicant's character and suitability

**Methods**
There are a number of considerations in the actual process of acquiring references:

**Who to ask?**
Projects should consider requesting both character and professional references; each has its own merits.

**How to ask?**
References are normally requested in writing. It is desirable that referees are given a form to complete in order that specific questions are answered. Some projects may choose to take up telephone references; such references must be accurately recorded.

**What to ask for?**
Information requested will vary from project to project. However it should relate to the project's Befriender Person Specification (see page 11)

It is important for projects to have signed, written copies of references.

**When to ask?**
Processes widely vary from project to project. However references must be taken up at some stage in the selection process, and definitely before the volunteer starts befriending.
Recommendations
In the process of acquiring references, projects should ensure that:

- all references are treated in confidence, and that the referee is aware of this
- the referee has information about the project and the befriender's role
- at least two references are taken up
- referees are not family members / partners

Assessing a Volunteer's Suitability to Work as a Befriender
One of the most important responsibilities of the befriending project is the management of the selection process.

This process generally involves several stages. It involves project staff meeting the applicant in order to assess his/her suitability to work as a befriender. These meetings may take the form of individual interviews, and go on to include further assessment in an introductory training course.

The purpose of the selection interview is to assess the applicant's suitability to work as a befriender for the project in question. The criteria to be assessed are identified in the Befriender Person Specification (see page 11).

Peoples' motivation for becoming involved in 'helping' work can often be complex. The qualities being assessed cannot be identified in a simple question and answer discussion.

The aim of the selection interview is to offer the applicant an opportunity:

- for an open and genuine exploration of issues relevant to their application
- to explore the origin and nature of their interest in this area of work
- to reflect on how their own life experience informs them about the nature of the work
- to raise their own issues, discuss practical questions, and gain a fuller understanding of the project's way of working.

The introductory training course offers both the applicant and the project the opportunity to reconsider whether it is appropriate for the person to become a befriender.
It is important that the selection interview and selection process, are managed sensitively, in ways that are congruent with the project’s aims and values.

**Recommendations**

- Responsibility for selecting befrienders should not rest with one person.
- More than one relevant person in the project should be directly involved, whether as interviewer or trainer, in the interview and selection process of each applicant.
- The introductory training course should be seen as part of the selection process.
- It should be made clear to applicants that an invitation to attend introductory training does not equate with acceptance to become a befriender.
- Initial selection interviews should be held before applicants are considered for invitation to introductory training.
10 Training

The Purpose of Training
Training ensures the quality of befriending projects. It directly benefits the project, its befriencers, and ultimately affects befrienees.

Recommendations
Projects provide training for befriencers in order to:
- Prepare befriencers for the realities of their role
- Further befriencers' personal and professional development
- Enable befriencers to make informed choices about their future involvement
- Assess befriencers' suitability relating to the person specification
- Provide befrienees with befriencers who are suitably prepared

The Number of Training Sessions
Befriending projects run training courses and events of varying length dependent on the content and depth necessary.

Recommendations
Training courses for befriencers involve a number of sessions because this:
- Tests the commitment of befriencers before matching them
- Gives opportunity to cover subjects in sufficient depth
- Allows time to build up trust
- Allows group processes to develop
- Enables assessment of how befriencers relate in a group setting
- Allows time for reflection for the project and the befriencers

Training Session Content
Nationally befriending projects match befriencers with a wide range of befrienees. However there are issues, information, skills and attitudes which are relevant to most befriending situations.
Preparation Training

Recommendations
The content of Training Courses for befrienders includes:

- Project Policies and Procedures including Health & Safety, Emergencies, Complaints, Expenses
- Definition of befriending - role description
- Motivations and Expectations - hopes and fears
- Beginnings and Endings
- Attachment / Separation and Loss
- Relationship Building
- Communication and Listening Skills
- Boundaries
- Confidentiality
- Information specific to the client group
- Attitudes and Values - prejudices and discrimination / equal opportunities
- Personal development / self reflection

Ongoing Training

Recommendations
Projects regularly review the provision of ongoing training on further relevant topics once befrienders are matched.
11 Responsibility and Accountability

By virtue of offering a service, befriending projects need to take responsibility and be accountable for the service they are offering. Projects have responsibilities towards befrienders, befriendees, employees, referring agencies and the wider community.

The project has a responsibility:

• to manage its own affairs and its own personnel in a responsible and professional manner
• to provide a service that can be used with confidence and in confidence
• to be clear and explicit about the nature of the service on offer
• to treat befriendees with respect
• not to expose befriendees to abuse or exploitation
• not to exploit befrienders or expose them to undue risk
• to work in as open a way as possible
• to work with an anti-discriminatory approach
• to provide its staff, paid and voluntary, with adequate training, support, supervision and monitoring
12 Support and Supervision

Introduction
The tasks of support and supervision, although different, are highlighted together in this document. Support focuses on the needs of the befriender, supervision focuses attention on the befriendee and the issues of accountability.

Befriending work is, on the whole carried out at a distance from the project - not directly witnessed by a supervisor or peer group. Befriending can be isolated and stressful - and the needs and rights of both the befriendees and the befrienders must be protected. Befrienders also need to feel as if they are getting something back for the effort they put in - in a personal, practical or social sense.

It is for reasons that appropriate levels of support and supervision should be offered.

Purpose
In summary, the purpose of support and supervision is to:

• Appreciate and value the befriender by supporting and developing their work
• Help maintain the befriender's input by providing emotional and practical support
• Reduce stress and isolation
• Monitor and evaluate the relationship and set objectives for ongoing work, where appropriate
• Ensure accountability of the service offered by the project through the befriender, by setting up systems to check that:
  ⇒ the befrienders are doing what they say they are, and what they are supposed to be doing
  ⇒ the objectives of the befriending are being met
  ⇒ the project's boundaries are being observed
  ⇒ there is no exploitation of befriendees - emotional, financial or sexual

Individual Support Sessions
The role of befriender has the potential to be stressful. A befriending relationship has also the potential for both helpful and unhelpful dynamics. Befrienders may not in fact realise how they themselves or their befriendee are being affected, until they take time-out to talk about it. It is for this reason that regular, individual face-to-face sessions are crucial for supporting a befriender's
work. Such regular sessions ensure an appropriate level of monitoring and evaluation is in place and that the project remains accountable for the befriender's work.

Overall the reasons for providing regular face-to-face sessions include:

- accountability
- it allows building of a relationship with one designated worker
- it provides regular and reliable time to reflect on the dynamics of the relationship
- discussion of the objectives and purpose of the relationship
- discussion of the impact of the relationship on the befriended
- discussion of the impact of the relationship on the befriender

**Methods**

In addition to individual supervision, there are a variety of other support methods which help make befrienders feel valued. They also keep them motivated and involved, with an important sense of belonging to a project.

There are a variety of methods which an project can offer, including:

- face-to-face sessions
- telephone link
- group
- social events
- practical help
- training
- access to information
- peer support
- personal development
- out-of-pocket expenses
- dependants/child care expenses

Any combination of these can developed, as and when appropriate, by a project.
Recommendations

• Each project has an obligation to provide regular, individual face-to-face support / supervision sessions for each befriender.

• As a general rule, depending on the nature of the work asked of the befriender, the level of support / supervision would ideally be one session per four befriended contacts.

• Regular attendance at support / supervision is an essential condition of being a befriender. This should be made clear in a Volunteer / Befriender Agreement or pre-befriending training.

• The development of other support methods to keep befrienders motivated, with a sense of belonging to the project.

Group Support Sessions

In addition to 1:1 support, there is also great value in providing opportunities to meet with other befrienders for group support sessions.

This offers the chance to discuss common issues, peer support, and an opportunity to lessen the potential isolation of befriending. It also enables befrienders to feel part of an overall project and of the organisation involved. Some projects may choose for such sessions to be compulsory, other offer occasional optional events.
13 Boundaries

Boundaries are limits which we set ourselves in our everyday relationships; what we share of ourselves, and how we manage our relationships with different people at home, at work and socially. They are often unconscious - that is, we instinctively decide how we act in a given context, or they may be conscious.

Boundaries are a fundamental, integral part of befriending which link with many other areas of good practice e.g. training, supervision and support. Boundaries are a positive element of a befriending relationship with good reasons behind them, rather than a negative restrictive idea.

Boundaries help befrienders to know exactly where they stand on issues of confidentiality, conduct and working limits. Some clear and explicit boundaries are essential in befriending work; firstly for the protection and safety of both the befriender and the befriended; and secondly in order to establish a safe dependable setting in which the befriending relationship can develop. Befriending relationships that work best are those that remain within boundaries, as crossing boundaries can lead to dependency for the befriended, and cause confusion which could cloud the development of a befriending relationship.

By the nature of the work, and the possible level of vulnerability of the befriended, befrienders are in a position of trust. They therefore need to take a great deal of care in their contact with the befriended, to establish and maintain safe and dependable boundaries to the befriending relationship. Where there is a lack of clarity the relationship can suffer or even break down.

Boundaries can change over time, often for very positive reasons, and projects will need to re-appraise boundaries within the befriending relationships it establishes.

Setting Project Policy About Boundaries

Projects should consider the involvement of various people in the setting of project policy, or in reviewing existing policy or guidelines on boundaries. These may include befrienders, befriendedes, management committees, and referral agencies, who may all provide useful contributions to the setting of guidelines.
Such involvement will enable projects to consider the different perceptions which may exist about boundaries between those involved, from being an unwelcome barrier to friendship, to a necessary step for protection and safety.

**Setting the Boundaries with Befrienders and Befriendees**

It is important for both befrienders and befriendees to know that a project has:

- general boundaries for all of its befriending relationships
- specific boundaries for individual relationships

Boundaries should be established from the start of a befriending relationship, so that roles and expectations are as clear as possible. This also provides a reference point to come back to in the event of difficulty.

Discussing boundaries with befrienders and befriendees should be done in a variety of ways in order to reinforce this important information, for example:

- individually with befriendees at referral interview
- with befrienders at interview and in training
- with both parties at matching meetings
- in project literature
- in supervision and reviews once relationships are established

Projects should be aware of the potential difficulty for befrienders and befriendees in being presented with a large amount of information at one time, for example at a referral interview or first meeting, and therefore use a range of methods to present information on boundaries over time.

Training is an important means of exploring boundaries with befrienders. Projects should seek to be creative in training about boundaries in order to ‘bring to life’ some of the situations which befrienders are likely to encounter.

Projects may find it helpful to have a simple agreement drawn up with the expected level of meetings and types of activities, which those involved receive a copy of. This can act as a basis for review and for resetting boundaries which may alter over time.
Projects may also have other boundaries set out in the form of guidelines or written statements which explain expected working practices. A project providing clear guidelines for a befriender can remove some pressure from them in having to make decisions and set boundaries.

**Boundary Guidelines**
Areas on which guidelines can be useful include:

**Time**
The time available for people to commit to a befriending relationship will have limits and these should be defined at an early stage. These areas include:

- The commitment expected over time i.e. an indication of the average or expected length of befriending relationships for the project
- The frequency of meeting e.g. weekly
- The approximate length of meeting e.g. three hours

Projects should be clear about additional time which befrienders may commit in the course of befriending e.g. travel time, time in supervision or training, and whether this is expected to be part of their overall commitment.

Projects should acknowledge that befriending relationships may be interrupted e.g. by holidays or illness, and should encourage befrienders to give notice of these situations whenever possible. Projects should respond sensitively to individual situations e.g. it may offer temporary staff support or an alternative match.

**Personal Details**
Projects may advise befrienders not to give out their personal details and contact information. In these cases the project acts as the facilitator for organising meetings after matching. Other projects may advise befrienders and befrienees to share personal details at a point in the befriending relationship when they feel comfortable about doing so. Projects should help befrienders to consider the possible implications of sharing personal details, and encourage those who do to qualify any new arrangement e.g. noting suitable times to phone, not being available 24 hours a day etc. Projects should ensure that they know whether or not contact details have been exchanged, and therefore befrienders should be advised to inform the project if this has happened.
Projects should be aware of potential imbalances in befriending relationships e.g. the befriender has the befriendedee’s contact number or home address but not vice versa.

Involvement of Friends and Relatives

Befrienders
Projects should think through carefully its approach to the possibility of befriendedees being introduced to friends and relatives of the befriender in the course of befriending. Whilst this can widen the befriendedee’s circle of social contacts, it does introduce people who have not been selected or trained by the project. It also brings the relationship away from the initial principle of being one to one and can bring in issues of Confidentiality (see page 30) e.g. people unconnected with the project receiving personal information on befriendedees.

Befriendedees
Befrienders may find themselves involved with the friends and relatives of the befriendedee. Whilst this can have a positive side to it (and may be the aim for family befriending projects), problems can develop if the befriender begins to provide support to more than one person, and befriending moves away from the original aim of a one to one relationship. Projects need to be prepared to offer guidance and practical suggestions to prevent such situations occurring and to deal with them if they do.

Role of the Befriender and the Befriendedee
Clarity about the role of the befriender at the beginning will help befrienders, either through choice, pressure, or ignorance of their role or rights, to avoid becoming involved in areas of support which are not their responsibility.

Projects may find it helpful to define the tasks which they would expect a befriender to get involved in (see Role and Task of a Befriender page 10), and those that may not be appropriate e.g. babysitting, taxi service, home help. It is also important for projects to notify referral agencies of the befriender’s role in order to encourage more appropriate referrals.

Projects also need to provide information for the befriendedee on boundaries, ensuring that the befriendedee fully understands the befriender’s role and the limits of the relationship.
The role of a befriender within a relationship may alter over time and projects have a responsibility to review this in conjunction with those involved. Such a review can also help to keep a befriender focused on the boundaries of their role.

Clarity over role can help a befriender to respond appropriately in difficult or crisis situations, and where possible projects should reinforce this with the befriender and discuss the implications of different courses of action. Projects should consider providing befrienders with emergency contact numbers or next of kin details, and cover emergency situations through training. Projects should also be clear on the action their befrienders would be insured for.

The befriender should also be aware that they are a representative of the project and should therefore act in a responsible way in the course of befriending.

Clarifying the role of the befriender is therefore an important part of the Training (page 17) and Support and Supervision (page 20) of befrienders.

Projects have a responsibility to prepare their befrienders as well as possible for some of the challenges they may meet where boundaries are tested out, or where they experience pressure to take on a role other than that of befriender.

Befrienders may need support to set boundaries. Projects should be aware that some befrienders may need more support than others to recognise and keep boundaries.

**Role of the Project**

As befriending relationships develop over time, befrienders and befrienees may begin to view their relationship simply as friendship, unconnected with the project. This can lead to both parties wishing to continue meeting without contact with the project. In such cases the project needs to discuss with both parties the implications of the project no longer being involved. (see Beginnings and Endings page 38)

Projects should consider the boundaries of their role in providing feedback on befriending to other agencies that may be involved. (see Referrals and Referral Agencies page 31).

For befriending relationships which may be coming to the end of their need for project contact, the project has the responsibility to end its involvement as sensitively as possible (see Beginnings
and Endings page 38). The project should also help those involved to consider the implications of maintaining contact after the relationship has ended e.g. ending of expenses, insurance, and ensure that it is clear that the project no longer has a responsibility.

**Location**
Relationships develop better in meeting places where both parties are happy. Consideration should therefore be given to where befrienders and befriendedees meet each other. The location should be mutually suitable, accessible to both and those involved need to feel safe and comfortable. Other considerations should include being sensitive to the need for privacy if confidential issues are likely to be discussed. It is important that those involved should feel able to say if they are unhappy with where they are meeting e.g. if they do not regard it as a safe environment.

**Finance**
Financial issues may affect the befriending relationship and projects may wish to give clear boundaries about these areas e.g. loans, ‘indirect’ payments such as shopping or a befriender regularly paying for the befriendee’s activity, or gifts which projects may choose to put a value limit on.
Without boundaries these areas can have implications which affect the befriending relationship including bad feeling, dependency and exploitation.

**Illegal Activities**
Projects should have clear policies about the procedures they expect their befrienders to follow in situations where they encounter illegal activities. In some instances there are clear statutory responsibilities for reporting e.g. child abuse. In other instances befrienders may hear of or encounter other illegal activities. It is important that these situations are covered in the preparation training offered to befrienders and support is available that allows befrienders to discuss these issues if they arise.

**Changes to Boundaries**
Over the course of a befriending relationship changes will occur which may affect the boundaries of a relationship. Projects should allow opportunities for these to be discussed e.g. through supervision or reviews, and where necessary discuss changes with all concerned.
Significant changes may occur in the befriendee’s circumstances e.g. changes in health, family circumstances, or a need for extra support. Being involved in areas such as these may not have been in the original expectations of the befriender, and they should have a choice about being involved in situations where boundaries have changed.

Boundaries may change to the detriment of the relationship or the individuals in it. The project should consider any such changes in line with its aims, and negotiate where possible. If this is not possible it should aim to sensitively end the relationship.

**Recommendations**

- The role of befrienders should be clearly defined to all involved from the outset
- Specific boundaries within the befriending relationship should be clearly defined to all involved wherever possible
- Guidelines to cover situations commonly experienced by befrienders should be provided
- Befrienders should be aware of their responsibility to work within a project’s guidelines
- Boundaries should form an integral part of Training
- Support and Supervision should be used as a time to review boundaries
14 Confidentiality

Confidentiality is an important issue for befriending projects because:

- The project may have access to personal information on staff, befrienders and befriendees
- Befrienders may hear of sensitive issues in the course of befriending

For these reasons, each project should have a clear, written Confidentiality Policy in order to protect the best interests of staff, befrienders and befriendees.

A Confidentiality Policy should consist of guidelines on the sensitive handling of personal information within the project and between organisations e.g. referral agencies. This policy should be made available to staff, befrienders and befriendees. Other agencies e.g. referral agencies, should be made aware of the project’s policy and aspects of it which may be expected to comply with.

Recommendations

Each project should define its own Confidentiality Policy addressing the following issues:

- Breaches of confidentiality:
  - Legitimately e.g. where child protection issues, personal safety and life threatening situations are involved
  - Inadvertently e.g. disclosing a befriendee's identity / details by mistake
  - Deliberately e.g. wilful disclosure as above

Every breach of confidentiality needs to investigate, and action should be taken to educate and/or discipline those involved.

- Storing of and access to written information e.g. references, personal records, police checks.
- Sharing of information
- Storing of information on computer / fax / electronic equipment / answermachine messages.
- Regularly reviewing information held by the organisation in order to dispose of outdated and unnecessary information.
15 Referrals and Referral Agencies

The point at which befriendees come to a project is a time of assessment and exchange of information. This will have an important impact on matching and on the befriending relationship. Befriendees will generally come into befriending projects referred by other agencies, by existing contact with the project, by referring themselves, or by being referred by family members.

The fundamental issue involved, however the initial contact has been made, is that the befriender has chosen to get involved in befriending. Projects need to ensure that befrienderes have been involved in the referral to avoid unnecessary contact with people who are being pushed towards support they do not want. Gaining appropriate referrals can avoid unnecessary work and rejection for befriender, and increase the chances of befriending working.

Dealing with Referral Agencies

Where projects rely on other agencies to refer people to them, developing positive relationships with these referral agencies can have a significant impact on daily work, leading to an increase in people being referred for whom befriending is appropriate.

For new projects, developing good relationships early on with referral agencies will be beneficial.

Criteria

Projects are generally offering befriending to a particular community or to certain individuals. Having clear criteria about who befriending is for, begins the process of gaining referrals of people for whom the project is able to provide support.

Projects should offer simple, clear criteria in a way that allows agencies to consider their reasons for referral.

In addition to criteria, projects may choose to provide referral agencies with other written information e.g. explanations of who its befrienders are, the type of activities that befrienders get involved in, the process involved in making a referral, case study examples of how befriending might benefit an individual.
It is important for referral agencies to understand:

- that befrienees should choose to get involved in befriending
- that befriending is often a form of complementary support
- the role of the befriender and the limitations of this role
- the potential need for the continued involvement of the referral agency

**Information from Referring Agencies**

Projects need to be clear and confident about the information they need to gain from a referring agency e.g. information which may impact on a befriender’s or befriendee’s safety, or information which may enhance or prejudice the development of the befriending relationship (see Safety Within Befriending page 41).

Projects also need to be clear to all concerned which of this information will be passed on to the befriender, bearing in mind the befriendee’s right to confidentiality.

**Self-referrals**

Self-referrals can be a very positive development for projects. As with all referrals it is important that the role of the befriender has been understood.

Without the involvement of a referral agency, there can be a lack of background information. Projects need to balance this with the need to gain enough information that allows an assessment of the situation they are putting a befriender into, and enables effective matching. Should the project require relevant background information then befrienees should give consent for this to happen, preferably in writing.

**Contact with Referral Agency After Matching**

It is important to establish the expectations of referral agency involvement after matching. This will help to avoid too much pressure or inappropriate responsibility being placed on the project or on an individual befriender.

The feedback given to a referrer about the befriending relationship should also be thought through carefully, and befrienees should be particularly aware of this link and the information which will be passed on. Some projects may expect referral agencies to take part in reviews and vice versa.
Where the referral agency maintains contact with the befriendede and may be aware of changes in their circumstances, it should be agreed that projects are kept up to date with any change which has an impact on the befriender’s activities.

Projects may consider a simple statement of responsibilities or expectations as a basis for agreement with referral agencies.

Referral from Family Members
In some projects, referrals may be made by family members. As before it is important that the befriendede has chosen to seek support from befriending. Once again the role of the befriender and the exchange of information between all of those involved, are areas to be clear about.

Waiting Lists
Befriending projects may encounter situations where they receive too many referrals and have to operate a waiting list. It is important to keep referral agencies and befriendedees informed of the availability of befriending as they spend time on a waiting list. Projects should stress the importance of matching and note that people will be matched on support needs and on the availability and suitability of befrienders, rather than on who is first on the list.

Referring to Other Agencies
Befriending projects may receive referrals of people who do not meet the criteria for befriending. Where possible projects should try to refer people to alternative sources of support. It is therefore important to be aware of other relevant projects in the locality.

Other Points
Referrals can also occur where people have been encouraged to become befrienders e.g. people with high support needs recommended voluntary work as a way of increasing their self-confidence. The role of a befriender requires particular skills and abilities and projects should not compromise on these (see The Role and Task of a Befriender page 10, Befriender Assessment and Selection page 12). It may be possible to consider other opportunities for these volunteers to be involved in projects (see Participation by Befrienders and Befriendees page 44).
Evaluation
Projects may find it helpful to review their relationships and procedures with referral agencies, checking that contacts are still up to date, and ensuring that they understand the concept and purpose of befriending, and the project’s criteria and procedures.

Recommendations
• Projects should have clear procedures for receiving referrals from different sources
• Befriendees referred for befriending should have made a choice to get involved
• Projects should communicate clearly with referral agencies about the criteria and procedures for befriending
• Projects should be clear about the information to be exchanged both at the time of referral and during a befriending relationship, and who will have access to it
• Projects should recognise the important role of referral agencies in providing information which enables an assessment relating to safety to be carried out
16 Matching

Introduction
Matching is the process which links befrienders to befrienees. It involves making informed decisions on the suitability of each person to form a relationship with the other.

The Importance of Matching
Matching is a process which enables care to be taken in deciding which befriender meets with which befrienee.
The aim of the process is to ensure that by personalising each match, they are given the best opportunity to become established and meet the needs and expectations of both parties. Matching, which involves careful consideration, also enables the project to provide its best service and be accountable for the decisions it takes.

The Decision Making Process
The decisions on matching are best carried out by staff who have met both the befriender and the befrienee, and are aware of their needs and expectations, and the personalities involved.
Deciding on the reasons for choosing particular matches, can be assisted by discussion with a third party e.g. colleague, manager, management committee member.
Group events which allow befrienders and befrienees to meet informally may also prove helpful in making decisions about matching, although such occasions should be handled sensitively in order to avoid raised expectations which cannot be met.

Giving Choice in Matching
The matching process should involve asking both parties for their opinion on who they would best relates to, and why. However this should be done in the light of each project’s Equal Opportunities Policy in order that individuals are not discriminated against. (see page 6 and Befriending Network (Scotland) / Equal Opportunities Policy).

Issues to Consider in Matching
The issues which can influence choice in matching befrienders with befrienees can be varied and complex. The overall goal is to achieve positive compatibility which meets the needs and expectations of those involved.
In order to reach a balanced decision it is important to be aware of the attitudes of befrienders, befriendees and of those involved in decision making. Issues which may need to be taken into account can include:

- befriender's experience and abilities
- availability - proximity / times available
- age
- gender
- race, ethnicity, culture
- interests
- opinions of carer / relative of the befriendee
- sexuality
- safety of the befriender and the befriendee
- commonality of experience – i.e. have the befriender and the befriendee shared similar life experience which may prove either helpful or unhelpful.

In some situations, befrienders or befriendees may wait some time to be matched. It is important for organisations to keep people informed of progress and likely outcomes in such situations.

"Gut Feeling"
Often the matching of a specific befriender with a befriendee will "feel right". Whilst these feelings can be helpful, it is important to clarify and articulate the underlying reasons. Matching should be not be based on gut feeling alone, but should allow much more detailed consideration of issues relevant to the project and those involved in it.

Information Sharing
The matching process will involve the sharing of some personal information either verbally or in writing. Organisations should discuss with befrienders and befriendees which information each needs to know about the other before they meet, so that both parties are aware of the information which will be exchanged. (See Confidentiality page 30).
Organisations may choose to ask befrienders and befriendedees to write profiles or complete questionnaires on themselves so that written information can be shared before an introduction meeting is organised.

Rejection
Once information has been exchanged both parties should be encouraged to discuss concerns they may have. The opportunity to reject the match offered before the meeting, should be part of the matching process.

First Meetings
It is important to be aware that befrienders and befriendedees can be apprehensive about first meetings and find them stressful. Considerations should be given to suitable format and locations for first meetings, where both befriender and befriendedee can feel comfortable.

A member of staff form the project should be involved at the first meeting to introduce befrienders and befriendedees, as well as to establish practical issues and clarify any outstanding questions.

Recommendations
• Organisations should recognise the importance of matching by implementing clear procedures
• Decisions on matching can be helped by offering choice to those involved in line with an Equal Opportunities Policy
• Decisions on matching should be based on a thorough examination of relevant issues and attitudes of all those involved
• Decisions on matching can be helped by a discussion with a third party
• Practical details to reduce apprehensions of the first meeting should be implemented
17 Beginnings and Endings

The handling of beginnings and endings are important elements in a successful befriending relationship. There are possible particular stresses which need to be acknowledged. At the beginning of the relationship there is the potential of rejection for both parties, and both befrienders and befrienees often report feelings of "what if they don't like me?"

The successful handling of beginnings can enable a relationship to get off the ground, and sensitive management of endings is important so that any positive achievements of the relationship are not negated.

Beginnings

The way in which a relationship starts can often set the tone for what is to follow. It is inevitable that both the befriender and befrienee may be a bit anxious or nervous at the beginning. Staff must be sensitive to this and provide the necessary support and close monitoring of the situation. Befrienders and befrienees may require more contact, reassurance and the opportunity to talk about how they are getting on, in order to establish their own confidence levels.

There is no set pattern for how a relationship might develop, but the potential for teething problems or a settling-down period must be appreciated. Some projects choose to have a trial period of approximately 3-4 weeks which allows for both befriender and befrienee to comment on the suitability of the matching, along with the monitoring of the befriender by the project. Other projects may decide to formally review the relationship before establishing a system of ongoing review over some months.

Endings

The importance of the handling of endings cannot be underestimated. Unless dealt with appropriately and positively there is the potential for undoing a lot of the good work achieved throughout a befriending relationship.

People find endings difficult because of the range and intensity of emotions that can be attached to them. It is vital to acknowledge to all parties that endings can be difficult and complicated, and sometimes they can create feelings of sadness and loss - and these feelings should be acknowledged. On many occasions endings can be a reason to celebrate and to look forward to
the future, especially if the relationship has been successful and achieved some of its aims e.g. enabling an individual 'to move on'.

**Planning of Endings**
Essentially the intention should always be to plan for endings which should be made explicit in the training.
Endings should be planned in order to give all parties sufficient time to deal with the feelings involved. Enough space must be given for both parties to share their feelings about what the relationship has meant for them, how they feel about it ending and to plan for the future.

**Unplanned Endings**
Occasionally the befriender or befriendee may terminate the relationship without notice. An abrupt ending by the befriender may be experienced by the befriendee as a severe rejection, abandonment or even punishment, particularly if they have had one of their few experiences of building up trust. It is crucial that any such feelings are recognised and responded to.
Similarly, in exceptional circumstances, the project has the right to, and may have to decide to, terminate the relationship for the welfare or safety of either party. Such circumstances must be carefully managed.

**Decision to End**
Ideally endings should come about as a mutual decision between the befriender and the befriendee. It is for this reason that supervision and monitoring of the relationship should remain constant throughout, so that staff can help both parties to reflect on and evaluate the purpose of the relationship. There is a danger in letting the relationship 'drift' on through an unhealthy dependency, or because broaching the notion of ending feels uncomfortable.

Once the befriending does end it is important that the project makes a formal statement to both parties clarifying the fact that it is no longer accountable for the relationship. Great care must be taken to explore the motivations and expectations of people who may choose to keep in contact with each other.
Each need to be handled sensitively and they are another time when the project must offer extra support to the befriender, who will be dealing with their own feelings about the ending, along with responding to those of their befriendee.
Recommendations

- Ideally always plan for positive endings with minimum period of notice (e.g. 4 weeks)
- Recognise that some individuals may find endings and the associated feelings particularly difficult
- Do not ignore any signs that the relationship has appropriately run its course
- Encourage the pairings to mark their last meetings with a special 'celebration' or event, if appropriate
- Make a written statement to both parties acknowledging that the project is no longer accountable for the relationship
- If either the befriender or befriended leaves without notice, ensure that appropriate support is provided to the individual who has been let down.
- Make clear the project’s right, in particular circumstances, to terminate the formal relationship
- Monitor the relationship e.g. through a trial period or ongoing review
18 Safety Within Befriending

Befriending is not directly supervised and often takes place outwith “office hours”. When initiating befrienders into their voluntary work and preparing them for their role, a project has the responsibility to assess any risks involved, and ensure that their safety is not compromised. Projects also have a role to provide safe befriending for befrienees. Safety issues can be addressed by aspects of work within other areas of good practice including:

- Recruitment and Selection of Befrienders
- Training
- Referrals and Referral Agencies
- Matching
- Boundaries
- Support and Supervision

Projects cannot eliminate risk but they can seek to effectively manage it, and some safety issues for befriending projects to consider are:

Referrals
Referral agencies need to be asked for information which might affect a befriender’s safety, and they should therefore understand the format of befriending e.g. not directly supervised / possibly involving home visits, in order to provide appropriate information. Referrals may need to be rejected if safety is compromised (see Referrals and Referral Agencies page 31).

Assessment of Situations
Projects should assess the potential risks in situations which befrienders will be involved in, and discuss any safety implications. The location of befriending meetings should be thought through and both parties should feel comfortable with where they meet. Projects should consider befrienders’ involvement with vulnerable people, and prepare befrienders to be aware of and avoid situations which could be misinterpreted and lead to allegations.
Matching Meeting
An initial introduction meeting for befriender and befrienderes should be structured and involve the project. Befrienders should never be sent to meet someone who has not already been met or visited by a member of staff from the project.

Health and Hygiene
Projects should consider whether their befrienderes will encounter health and hygiene risks, and take action to raise awareness of these issues and minimise any risks involved.

Befriender’s Responsibility
While the project has a responsibility to assess and manage risk and prepare their befrienders, the befriender has to take a certain level of responsibility for their own personal safety e.g. removing themselves from unsafe situations, informing the project if they are concerned for their safety. Projects should be careful not to encourage a culture of bravado, and should be aware that each befriender will have a different threshold with regard to feeling unsafe.

Befrienders should be encouraged to inform someone where they are going and when they can be expected to return (giving due regard to Confidentiality page 30). Befrienders should be encouraged to consider their own safety and to take practical steps such as avoiding poorly lit areas, ensuring that their transport is adequate, being aware of bus times etc.

Projects should be clear with their befrienderes about the level of responsibility they have for the safety of the befriender e.g. using car seatbelts, avoiding unsafe activities.

Insurance
Projects should ensure that they have public liability and personal accident insurance for befrienders.
If befrienders are using their own transport, they should be encouraged to inform their insurance company of their volunteering. Projects may also have a procedure to verify the safety of befrienders’ cars (i.e. copies of insurance and MOT details).

Out-of-Hours Procedures
Projects should consider the out-of-hours support they can realistically provide for befrienders e.g. emergency and non-emergency support.
Projects may be able to offer emergency contact numbers e.g. out-of-hours Social Work Department, taxi service, next of kin of befriendede if appropriate. Projects may also consider setting up befrienders in peer support groups for non-emergency support.

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

**Practical Solutions**
- Projects may choose practical means of providing a safer environment for staff or befrienders, for example by offering a mobile phone or a personal alarm.
- ID badges / cards for staff or befrienders may provide an added safety feature for befriendedes

**Other Points to Consider**
- Safety issues may be compromised by certain activities e.g. alcohol may change the dynamics of a situation

**Recommendations**
- Projects should assess the safety issues for befriendedes and befrienders and consider the links between safety and its recruitment, training, supervision, support, receiving referrals and matching
- Projects should seek the information they need to make an adequate assessment of the potential risks to safety in each befriending relationship
- Projects should offer guidance to befrienders on safety issues and ensure that befrienders understand their own responsibilities
Participation by Befrienders and Befriendees

As well as being involved in befriending itself, befrienders and befriendees have a right to participate in wider aspects of a project.

This is best undertaken with a planned approach which offers the chance to review opportunities for participation on an ongoing basis.

Reasons for wider involvement of befrienders and befriendees may include:
- Ensuring that the project reflects the views of the people it represents
- Helping to create a sense of ownership / belonging to a project
- Enabling befrienders and befriendees to make a positive contribution and to learn new skills
- Enabling befrienders and befriendees to experience a different way of being involved with the project
- Complementing the work and skills of paid staff

Possible areas to consider for such involvement:
- Management Committees / Advisory Groups
- Training
- Organising social events
- Promoting the project to potential befriendees
- Befriender and / or staff recruitment
- Peer support
- Project evaluation (including focus groups)
- Contributing to newsletters
- External training / conferences (giving feedback to others)
- Specific issues weeks e.g. Volunteers Week
- Attendance at AGM's

It may not be feasible however for some projects to consider participation in all of these areas.
Issues to consider:

- Importance of befrienders and befriended not being used as replacements for paid staff
- Necessity of providing training / support to enable them to become involved in the first place
- Participation will require a willingness to abide by the project's policies e.g. confidentiality, equal opportunities
- The project needs to be clear what their capacity is for encouraging participation
- For meaningful representation there needs to be equal opportunities for all to participate

Recommendations

- Considerations should be given to opportunities for involving befrienders and befriended more widely in various aspects of a project’s work
- Planning such participation should take account of the impact that this involvement may have for the project and the individuals concerned