

## An audit of the implementation of the Past Cases Review Report

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<b>Status of Paper</b>	Final
<b>Action Required</b>	To note
<b>Resolutions</b>	16/1. The Council receives the report.

### Summary of Content

<b>Subject and Aims</b>	To update the Methodist Council on the Implementation of the Past Cases Review Report prior to the Conference of 2017
<b>Main Points</b>	The range of levels of awareness and practice regarding the implementation of the recommendations of the Past Cases Review Report.
<b>Background Context and Relevant Documents (with function)</b>	<i><u>Courage, Cost and Hope: a report of the Past Cases Review</u></i>
<b>Consultations</b>	Circuit ministers, superintendent ministers, District Chairs and District Safeguarding Officers and senior leaders.

## Implementing the Past Cases Review Report

Report of an independent audit to assess progress on implementing the necessary cultural changes identified in *Courage, Cost and Hope*

### 1. Background

- 1.1 *Courage, Cost and Hope* the report of the Past Cases Review was received by the 2015 Methodist Conference. Recommendation 9 in the report was:  
*“That until the Methodist Church has robust accountability processes in place and fully operational, an annual independent audit of progress on these culture change recommendations and in particular on the mainstreaming of safeguarding awareness be carried out; and that a framework for the audits and proposals on who should carry them out be agreed by the Methodist Council in October 2015.”*
- 1.2 The Methodist Council agreed the framework for the audit, the process and the timescale at its meeting in October 2015.
- 1.3 In line with the agreed timescale and proposal, questions for the structured interviews and questionnaires were approved by the Council in January 2016. They were subsequently circulated to all district chairs and identified connexion-wide post holders.

### 2. Audit Process

#### 2.1 District Interviews with ministerial staff

- 2.1.1 In line with the agreed framework three districts were randomly selected and the Chairs notified by the end of July 2016. The districts selected provided a good balance in terms of size and geographical distribution.
- 2.1.2 The timescales agreed by the Council were extended to enable the Chairs to express a view on whether there were any exceptional reasons that meant their district could not be considered. (There were no such exemptions requested.) Chairs were also given a list of the randomly selected superintendents and ministers in their district to be able to advise if there were specific reasons why an individual should not be approached. (Exemptions were put forward and the majority, but not all, were agreed.) To allow for this, eight ministers' names were randomly selected for each district and ranked in the order in which they would be considered.
- 2.1.3 In two districts this resulted in a list of five ministers but in the third, time pressures meant that only four ministers were finally part of the process.
- 2.1.4 The ministers to be interviewed were contacted and sent the two papers that had been presented to Methodist Council early to mid September 2016.
- 2.1.5 All of the four identified Chairs have been interviewed, one in person and the others by phone. Of the nine superintendents identified, six have been interviewed in person, two by phone, with one withdrawing because of sickness. Of the fourteen ministers identified, ten were interviewed in person and four by phone. Interviews were 45 minutes to 1 hour in length. Each interview covered all the questions but there was also further exploration of some of the main cultural themes in most interviews.

2.1.6 The ministers were broken down by roles as follows:

- 4 deacons
- 10 presbyters, of whom 4 were probationers

## 2.2 Interviews with connexion wide post holders

Face to face interviews were conducted with the Secretary of the Conference, the Assistant Secretary of the Conference, the Connexional Safeguarding Adviser and a lead member of staff working on Complaints and Discipline.

## 2.3 Questionnaires to District Safeguarding Officers (DSOs)

All except one of the district safeguarding officers completed the questionnaire.

## 3. Results

Some of the audit questions led to results that can be presented numerically while others were more focussed on encouraging discussion. The presentation of results that follows reflects this difference.

The first section looks at communication and awareness of key messages from the report. It details what events were held to promote the PCR report and whether people attended. It also includes an assessment from ministers as to whether congregations are aware of the report and its main messages.

The results of the questions and discussions on the impact of the messages from the review will be presented under the headings of some of the key culture changes identified in *Courage, Cost and Hope*.

### 3.1 Communication and awareness

3.1.1 The DSOs reported the following in their questionnaires:

- 15 DSOs organised events for circuit safeguarding officers/safeguarding trainers or ensured this was a significant item at a routine meeting
- 5 DSOs had organised a district/cross district conference for ministers and safeguarding specialists to discuss messages from the report
- 10 DSOs were invited to present on the PCR to the district superintendent's meeting
- 13 DSOs were invited to lead a presentation at Synod

3.1.2 From the district interviews it was reported that:

- The four Chairs had read the report in full when it was published and had also attended events focussed on the PCR.
- Of the eight superintendents, five had read the report in full, two had "skim read" it and one had not read it at all. Four of them had attended events or sessions specifically focussed on the PCR
- All of the four deacons had read the report in full, three at the time and one before the interview.
- The four probationer presbyters had all read the report, most said they had read it two or three times, and two had attended events or sessions specifically focussed on the PCR.
- Four of the remaining presbyters had read the report in full and two had "skim read" it. Four had attended events or sessions focussed on PCR.

3.1.2 There was a question about the impact of the review on congregations and this will be explored later in this report, but many of the interviewees said that they thought their congregation had no knowledge of the review at all. Some said that a few members had seen the news coverage.

### 3.2 Accountability

One of the key themes identified in *Courage, Cost and Hope* is that the Church needs to strengthen the accountability of those in positions of power, including all ministers. To explore the extent to which the importance of this theme had filtered through to those on the “frontline” most interviewees were asked about their understanding of accountability and whether this was a subject they had discussed in their circuit staff teams or other groupings. It was striking that it was the Chairs, deacons and probationer presbyters who had almost all discussed this in various groupings and could actively engage in a dialogue about it. With very few exceptions the other presbyters and superintendents had not been part of such discussions and needed considerable prompting to engage with the subject.

#### 3.2.1 Supervision

The general discussion on accountability led on in most interviews to a discussion about supervision. Some, but not all, interviewees were aware of the pilot and some had discussed supervision with others but with little knowledge of the model being used. In one of the three districts there had been a presentation on supervision which most of the interviewees from that district had attended.

As this is a very important area in terms of implementing the PCR recommendations the results of the discussion will be presented below in relation to the different roles interviewees hold.

- The Chairs had all had training in supervision and felt positive about this. They were clear that they were in favour of supervision but one chair identified a number of key issues. They were: how will the time pressures be managed with this new demand, do current superintendents have the capability and skills to undertake the role even with training, have sufficient resources been allocated to support training and implementation.
- The majority of the superintendents were far more ambivalent than the Chairs about supervision and several were negative. One commented *“I can accept this with my head but my heart does not and I am glad that I am standing down soon as this wasn’t the ministry I joined”*. All had many questions about how it would work in practice. These included those identified by the Chair but additionally they thought superintendents supervising could change dynamics in staff teams in an unhelpful way.
- The deacons were positive about supervision and one currently has excellent supervision from her superintendent. Some queried whether superintendents have the skills and capability to supervise and the impact this could have where staff relationships are difficult.
- The probationer presbyters were very positive about supervision but were clear that supervisors needed training and to have the right skills.
- The other presbyters were mixed in their views with the majority being guardedly in favour. One commented *“the idea of supervision is a nightmare”*. The questions raised by presbyters were similar to those already mentioned above.

A number of people had questions about Ministerial Development Review (MDR) and how this links to supervision. Some said that they had not had an MDR for several years.

### 3.2.2 Pastoral record keeping

There were specific questions about pastoral recording and there was less difference in responses between the different role groups.

- Of the total of 22 ministers interviewed (excluding Chairs), 18 currently keep a log of the visits they do either in their paper or electronic diary. Two superintendents did not keep any log or any record and two people said they have just started as a result of the PCR report.
- 6 of the 22 keep some notes in addition to their diary/log

Almost everyone expressed the need for guidance on what should be recorded and why and how records should be stored, both paper and electronic. Most wanted a common format for the diary/log. In interviews where this was discussed at length there was acknowledgement that there is often a blurring of boundaries between pastoral concern and safeguarding, at least in the beginning and guidance needs to recognise this. The guidance also needs to cover what material should be included in handover notes when a minister moves on from their appointment. Many commented that they had received no information and that they thought this was wrong.

There did not seem any doubt that when a case clearly becomes a safeguarding issue detailed records are needed.

The issue of pastoral visitors and recording was raised in a number of interviews. Some ministers had taken this issue to their church councils or pastoral meetings and said that pastoral visitors must record their visits. This had caused upset. A number of ministers said they thought pastoral visitors would resign if they had to record. There was a real lack of clarity about what is expected of pastoral visitors and many asked for guidance on this.

### 3.3. Understanding the nature of safeguarding

This was identified in *Courage, Cost and Hope* as an important component of culture and section H.1.4 of the report included the following:

*“The core of safeguarding relies on an understanding and awareness of the dynamics between power and vulnerability in relationships. This is not a specialist activity that is only undertaken by those with qualifications or experience in the safeguarding field. Pastoral relationships which are core to the mission of the church will always include these dynamics.”*

There were not specific questions in the interviews that related to this but it was a theme that lay behind several of the topics explored. Three of the four deacons and all the presbyter probationers showed an in depth understanding of this and how safeguarding needs to be integrated into everything and that there should be more attention to an explicit theological underpinning. This perspective was not forthcoming from the majority of the more experienced presbyters and superintendents.

One DSO reflected the views of several others when she wrote:

*“A major barrier appears quite often to be that safeguarding is seen as a separate administrative task rather than a fundamental part of effective pastoral practice. Ministers and leadership often seem it to see it as a chore - a culture shift that has started with the PCR has some way to go.”*

Another said: *“Still some people think it is all 'red tape' Still some reluctance to believing it happens in 'our' church”*

Recommendation 17 of *Courage, Cost and Hope* is “That the appropriate bodies consider developing materials to promote wider awareness of safe relationships within church communities” and this is directly related to this question of a broader/deeper understanding of safeguarding.

Not all interviewees were asked about whether their congregations would use material if provided for small group study, but of those who were (over half), the response was overwhelmingly positive that at least some congregations and some groups would welcome this.

### **3.4. Safeguarding training policies and procedures**

Ministers were not asked directly about safeguarding training but DSOs were. Their responses on the impact of the PCR on the willingness of people to attend safeguarding training were as follows:

- 14 DSOs reported that there was more interest and less resistance to attending training since the publication of the PCR report.
- 7 DSOs said that they could not assess the impact yet.
- 2 DSOs said that the report had little impact in that those circuits where there were problems continued to be resistant.

A few ministers made detailed comments on training which will be fed back to the Safeguarding Adviser.

Some interviewees said that unhelpful and longwinded policies that were not clear were a barrier to implementing the messages of the PCR. Several people wanted more common formats for documents so duplication was reduced. There was also a view expressed that good practice needs to be shared more widely.

### **3.5 Support**

All the deacons and probationer presbyters referred to the importance of their support networks in enabling them to take on board the learning and cultural change that the PCR implementation requires. Their willingness to engage with supervision as a continuing feature of their ministry was expressed both in relation to accountability but also to the support they think is so important.

More experienced presbyters and superintendents did not speak about their need for support in the same way but very many of them identified problems in already managing their workloads. Time was cited as a barrier to implementing the PCR messages by the majority of this group. Two DSOs expressed the time barrier as follows:

*“The biggest barrier to implementation seems to be time. As many congregations are getting smaller, those who play an active role within churches often have to take on several roles”*

*“The conflicting demands of being a circuit minister”*

Several talked of operating not in a team culture but one where they just needed to “get on with it”.

### **3.6 Other barriers**

#### **3.6.1 Culture and language**

This was identified as a barrier in a district where there was a significant number of ministers from other Conferences who had been stationed. They did not have sufficient induction training to prepare them for our safeguarding culture.

In some congregations, language is a barrier to understanding and materials need to be translated.

#### **3.6.2 Leadership**

Two different points were made about leadership. One was that if leaders are to be effective they need to have authority as well as responsibility and as some of the recommendations are rolled out, particularly supervision, there will be a need to strengthen measures to deal with non-compliance.

Another is captured in this comment from a DSO:

*“The major barrier to implementing the lessons identified is apathy. This appears to be from both lay and ordained leaders in churches. To quote one response “people are only interested if their church has a safeguarding concern”. I have found that it is the attitudes of leaders that set the pattern for the attitudes of church congregations. Where a minister and safeguarding officers take safeguarding seriously the congregations begin to take it seriously. When speaking to circuit safeguarding officers there have been some that find the resistance to safeguarding in their churches is matched by the reluctance of leaders to promote or even support their work.”*

## **4. Discussion**

### **4.1 Communication and awareness**

On a positive note all the interviewees had heard of the PCR report and the overwhelming majority had read it, some several times to ensure that they really understood the messages. District events, particularly using sessions at Synod appeared to be a useful route to gain awareness but for many this was an overall briefing rather than an in depth exploration of key themes. Inviting the Assistant Secretary of the Conference to Synod in one case had helped to explore supervision in more detail.

It was disappointing to hear the assessment that very few ministers thought their congregations would have even heard of the PCR. This may indicate that superintendents were not uniformly diligent in ensuring the letter to the Methodist people was circulated (in September 2014) or that ministers did not respond to their superintendent’s request. The difficulty in getting messages through to church congregations, alongside the importance of a widespread ownership of creating safer spaces emphasises the importance of producing the materials for small group study and then having a robust promotion strategy for their dissemination. (Recommendation 17 of *Courage, Cost and Hope*)

No interviewee referred to using the website materials, either for their private learning or for group discussion and it may be desirable to explore how such materials could be better promoted. In particular when new materials for small group study are released they are more likely to be used if they are actively promoted by church leaders at every level.

## **4.2 Accountability**

The importance of gaining widespread ownership of the need to improve accountability is very important so that supervision is not seen as imposed and primarily as a matter of compliance. The strengths of the understanding of the probationers and deacons needs to be harnessed as part of this process. (It was striking that almost all of the interviewees who had a good grasp of the significance of accountability had professional experience before entering the ministry.) Given the timescales before supervision will be a reality for most ministers it is important to involve as many as possible in preparation for this change.

The process of engaging people in a wider awareness of accountability through staff team discussions etc could be informed by the production of resources such as a video clip of a supervision session, video clips of key people talking about what accountability in ministry means to them.

### **4.2.1 Supervision**

The audit highlighted the significance of this cultural change. The reservations and questions raised by interviewees will need to be addressed as part of the implementation programme.

### **4.2.2 Pastoral recording**

The audit highlighted areas that need to be included in guidance (PCR recommendations three and four) as follows:

- Why record pastoral encounters
- What to record
- Storage of records
- Handover of records

There is also a need for clarity around pastoral visitors and recording expectations, particularly as it appears some ministers are making demands on pastoral visitors that go beyond what is recommended and could alienate many of them.

## **4.3 Understanding the nature of safeguarding**

Training materials have been revised following the PCR and material produced on the ten learning themes which should help to address this issue.

As already mentioned materials for small group study will focus on power, vulnerability and abuse of power in a church context. This should increase the breadth and depth of understanding of safeguarding across the church community.

Several interviewees spoke of the importance of a sound theological underpinning of safeguarding practice and said they would value worship resources to support this. Work is already underway to produce such materials but again the audit feedback would point to the importance of how these are actively disseminated once produced.

## **4.4 Safeguarding training, policies and procedures**

The feedback from the audit should be helpful in the implementation of the new training materials and emphasising the importance of the user friendliness of the new policies and procedures.



#### 4.5 Support

The need for support for ministers should eventually be met, at least in part, by the roll out of supervision. In the meantime church leaders need to ensure that current arrangements are as robust as possible.

#### 4.6 Other barriers

The issues of culture and language need to be addressed in the districts where they are a significant barrier to good practice with resources provided as necessary.

The importance of leadership in cultural change cannot be underestimated. Although the responses indicate that Chairs own the recommended changes, there is much more resistance by superintendents and other presbyters. Dealing with this resistance will be a constant challenge for leaders overseeing the changes over the next few years.

#### 5. Further audits

Recommendation 9 of *Courage, Cost and Hope* referred to an annual audit until the accountability processes are in place and fully operational.

The paper that was approved by Methodist Council in October 2015 said:

*"The aim of the proposed audit is to ensure that, for the districts that are not involved in the pilot of supervision, there is another route to ensure that the Past Cases Review lessons remain high on each minister's agenda. A secondary aim is to provide the Implementation Group with an annual "snapshot" of some of the key issues that need to be addressed if the lessons from the report are to be embedded fully in the life of the Church." (para 1.3)*

For those people interviewed this audit will have contributed to keeping the PCR high on their agenda but the impact is unlikely to have extended beyond them. This aim has therefore only be partially met. The audit has however provided useful information on how far key messages from the PCR have filtered through to the "frontline" of ministry and what are the major stumbling blocks to implementation of the culture change recommendations.

It is the view of the audit team that repeating the same process annually will not provide sufficient additional information to justify the resource implications.

However this model of independent random audits does demonstrate an important commitment to assessing outcomes, not just focussing on delivering the outputs of change. One example where this approach could be used again is assessing the impact on church congregations, in terms of quality of understanding of safeguarding, following the release and dissemination of small group study material.

Assessing the impact of culture change will always be a challenge. In addition to highlighting areas which are likely to be barriers to change this audit has highlighted strengths that could be further harnessed to facilitate change.

The audit team would like to acknowledge with thanks the time and thought that the participants committed to the process.

#### \*\*\*RESOLUTION

##### 16/1. The Council receives the report.