

# **Samaritans safeguarding process and branch review report**

**September 2017**

**FINAL REPORT**



# Contents

<b>Foreword.....</b>	<b>4</b>
<b>Executive summary .....</b>	<b>5</b>
Introduction .....	5
Highlights .....	5
Consultation .....	5
Timing.....	5
Change management and leadership .....	5
Communication .....	6
Training .....	6
Piloting.....	6
<b>Chapter 1: Introduction .....</b>	<b>7</b>
1.1. This report.....	7
<b>Chapter 2: Context.....</b>	<b>8</b>
<b>Chapter 3: Safeguarding policy and procedures .....</b>	<b>12</b>
3.1. Development.....	12
3.1.1. What worked well?.....	12
3.1.2. What could have been improved? .....	12
3.2. Communication.....	13
3.2.1. What worked well?.....	13
3.2.2. What could have been improved? .....	14
3.3. Training.....	16
3.3.1. What worked well?.....	16
3.3.2. What could have been improved? .....	16
3.4. Implementation .....	18
3.4.1. What worked well?.....	18
3.4.2. What could have been improved? .....	18
<b>Chapter 4: Views and amendments to the policy and procedures .....</b>	<b>19</b>
4.1. Age distinction .....	19
4.2. Wording .....	19
4.3. Recording information .....	20
4.4. Discussing confidentiality .....	21
4.5. Safeguarding outcomes.....	22
4.6. Support for volunteers and Leaders.....	23

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**Chapter 5: Key lessons .....26**

5.1. Consultation .....26

5.2. Timing .....26

5.3. Change management and leadership .....26

5.4. Communication.....26

5.5. Training.....27

5.6. Piloting .....27

**Chapter 6: Next Steps.....28**

**Appendix 1: Process review survey questions and responses .....29**

**Appendix 2: Branch survey questions and responses .....32**

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## Foreword

In 2015, the Board of Trustees set a clear strategic direction for Samaritans which sought to reconcile safeguarding with our values of confidentiality and self-determination as closely as possible. As CEO and a volunteer, I recognise that this presents some challenges for Samaritans, but it was necessary for us to mitigate the substantial charity-wide risk we were facing and being advised of by external experts.

In April 2017, Samaritans implemented a new safeguarding policy and procedures to embed safeguarding practice and policy across the whole organisation and protect the safety of children and vulnerable adults using the service. This report, written by an independent research organisation, OPM Group, reviews the development and implementation process of the policy and draws out key learnings to develop better practice within the organisation.

To reduce the risk to the organisation the Trustees took the decision that we should implement the policy as soon as we were able to. For some, this meant the implementation felt rushed, and there was insufficient time for everyone to fully understand and engage with the new policy.

Many branches and volunteers have implemented the new policy and procedures effectively and managed the process the best they could. However, as CEO I'm committed to openness, honesty, learning and continuous improvement and as such I think it's important to recognise that there are things we could have done better. For example, we did not have all the resources needed for the project in place at the outset, in our desire to develop the approach together; we were unable to cascade information to all volunteers; and more could have been done to support Branch Directors in engaging their volunteers.

There are also learning points to consider about how our agreed structures of representation best serve our needs. This review shows how important it is to ensure a free flow of information and support between branches, volunteer management, and Central Charity. At times, there was a lack of clarity about leadership, management and governance within Samaritans.

We are already working to address a number of the key learning points such as better communication, management and leadership support through the *There for Everyone* programme. At Council of Samaritans, we will also be discussing the adoption of an agreed set of shared behaviours, which will help us to work together more effectively in the future. My commitment is that in working to secure the future for Samaritans, we learn from the important lessons of today.

Thank you for your valuable feedback into this review and all that you do for our callers and Samaritans.



Ruth Sutherland, CEO

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# Executive summary

## Introduction

In April 2017, Samaritans implemented a new safeguarding policy and procedures to improve the rigour of safeguarding practice across the organisation and protect the safety of children and vulnerable adults using the Samaritans service. To feed into the review which was planned to take place within 6 months of the policy go live date those involved in the development of the procedures were asked to fill in a survey and feedback was obtained from branches about the procedures and implementation. Samaritans then commissioned an independent research organisation, OPM Group, to draw out key learning and next steps.

This report presents key findings from the two surveys:

- The **process review survey** which was sent to the Executive Leadership Team, Regional Directors, Functional Leads, Trustees and staff members involved in the development of the safeguarding policy and/or procedures - 37 responses were received.
- The **branch review survey** which was sent out to Branch Directors to complete on behalf of volunteers in their branch, either based on their understanding and knowledge, or consultation with the volunteers in their branch to better inform the feedback provided - 164 responses were received out of 188 branches in the UK.

## Highlights

### Consultation

Many respondents to the process review survey felt consultation was good within the working group and senior volunteers, but that insufficient consultation took place with Branch Directors, Leaders and branch volunteers. Respondents to the process review survey, in particular, thought that volunteers should have been more involved. Respondents believed that regional consultation was required.

### Timing

Many respondents to the process review survey felt that the implementation of the procedure was rushed due to time pressures. There was a general consensus from respondents to both surveys that one of the key concerns was the timeframe, as many felt it to be too quick and that it was rushed.

### Change management and leadership

Several respondents to the process review survey felt that good change management was lacking for a project involving immense complexity and controversial change. The process required clear information, time for reflection, explanation of the change and why it was needed, time for it to be embedded, and clear training. Respondents felt that presentations at Council of Samaritans were too abstract to fully grasp the implications of the change before leading the change, training and roll out.

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Visibility of the CEO, Chair and Trustees to all volunteers in a range of different ways is important. Suggestions to improve visibility included a video/DVD for branches and letters to all volunteers about the roll out.

## **Communication**

Respondents to the process review survey and branch survey felt there was an over-reliance on Branch Directors to cascade the messaging. Samsnet was felt to be an effective tool to host information about new developments and procedures but remains limited because not all volunteers use it or find it accessible.

A key concern, particularly with the communication and training, was the lack of clarity about the policy and procedures and process for implementation, which in turn caused a lot of uncertainty among volunteers and Branch Directors.

## **Training**

A key message was that training was rushed, with all respondents to the process review survey stating that there was not enough time given to the roll out of training. Although many respondents see potential in using e-learning, in that it can be delivered quickly to a large number of volunteers, some disadvantages were also raised. Notably, some volunteers were not able to access e-learning or faced technical issues when using it. Additionally, results from the process survey and branch survey indicated that e-learning may not be appropriate for complex topics.

## **Piloting**

There was a strong feeling from respondents that the procedures and training should have been piloted ahead of full roll out. Respondents felt that piloting of the procedure, training materials and e-learning would have been beneficial and would have avoided some of the strong reactions received.

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# Chapter 1: Introduction

## 1.1. This report

This report provides an overview of the development and implementation of the new safeguarding policy and procedures, and presents feedback from two internal surveys:

- The **process review survey** which was sent to the Executive Leadership Team, Regional Directors, Functional Leads, Trustees and staff members involved in the development of the safeguarding policy and/or procedures.
  - The survey was sent to a total of 60 people – 37 responses were received.
- The **branch review survey** which was sent out to Branch Directors to complete on behalf of volunteers in their branch, either based on their understanding and knowledge, or consultation with the volunteers in their branch to better inform the feedback provided.
  - The survey was sent to a total of 188 branches – 164 responses were received.

This report is set out as follows:

- Chapter 1: Introduction
- Chapter 2: Context (provided by Samaritans)
- Chapter 3: Survey findings – presents key findings from the two surveys, themed under the following sections: development, communication, training, and implementation
- Chapter 4: Views and amendments to the policy and procedures – although this is not the focus of this report, this chapter presents findings from relevant questions asked in the branch survey in order that this information is not lost.
- Chapter 5: Key learning – provides a summary of learning points.
- Chapter 6: Next steps (provided by Samaritans)
- Appendix 1: Process review survey questions and responses
- Appendix 2: Branch survey questions and responses

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## Chapter 2: Context

In 2015, the Board of Trustees actioned development of a clear strategic direction for Samaritans which reconciled safeguarding with our values of confidentiality and self-determination as closely as possible.

The Children's Policy (2013) provided the building blocks to develop an approach to safeguard our most vulnerable callers but left a gap in Samaritans being fully responsible and in addressing vulnerable adult callers most at risk. Further catalysts came from the increased public and political awareness, attitude, opinion and action in not tolerating abuse, the potential damage to reputation and income and limits to collaboration, contracting and funding for the organisation.

In 2015, The Board of Trustees commissioned external experts to understand what measures would be needed to keep people safe and protect them from harm (including from the use of our service or the organisation itself), how the organisation could develop an appropriate response when abuse of some kind is disclosed during the use of our service and how Samaritans could reconcile safeguarding with its Nature of Service policies. As a result of the commissioned report the Trustees requested that Samaritans develop a Safeguarding policy and guidance that recognises our responsibility to children and vulnerable adults at risk whilst preserving the core values of our service.

The difficulties in delivering a change of this type within a federated structure were anticipated; with 201 branches and 20,000 volunteers the organisation works within a structured yet relatively inflexible method of consultation, decision making and communication. This process places a large amount of pressure on Regional Directors and Branch Directors to cascade communications and provide feedback at key decision points which can be a constraint of a federated structure. It can also inhibit visibility and transparency of the implementation process for many listening volunteers.

These issues were foreseen so robust communication and implementation plans were developed, which were underpinned by our governance process. These were made available to the Trustees and Regional Directors. Table 1 outlines this process.

**Table 1: The process of consultation, governance and communication**

Date	Activity	People consulted	Communication method
August 2015	<b>Snapshot survey</b> of possible safeguarding contacts	Three branches	Results presented at September Council of Samaritans
September 2015	<b>Paper</b> presented by Ruth asking for safeguarding to be considered	Board of Trustees	Paper presented to Board of Trustees
September 2015	<b>Presentation</b> of survey results, rationale for safeguarding and key principles to consider and consultation	Council of Samaritans	Presentation to Council of Samaritans
September 2015	<b>Consultation</b> in relation to confidentiality, self-	Council of Samaritans	Council opt in sessions



	determination and consent		
October - December 2015	<b>External review</b> commissioned to address safeguarding arrangements	Interviews with staff and senior volunteers, review of key documents and other organisations' (Childline, Age UK and Young Minds) safeguarding policies and practice.	Review presented to Board of Trustees
January 2016	<b>Consultant's report</b> presented to BOT which proposed three options for BOT to consider. 1) Make no change to current practice. 2) Address children's safeguarding following the example of the Republic of Ireland. 3) Address safeguarding of both children and vulnerable adults.  Option 3 was chosen by Trustees.	Board of Trustees	Report presented to Board of Trustees
February 2016	<b>Policy</b> written and agreed by Trustees	Board of Trustees	Teleconference to agree policy
March 2016	<b>Presentation</b> at Council of Samaritans to introduce policy	Council of Samaritans	Communicated via presentation and Q&A session, and feedback box
April - May 2016	<b>Workshops</b> to draft procedures	Senior listening volunteers (FLs), RDs, Chair of RDs, some Trustees, core staff	Draft procedures sent to Central Council for review
April and July 2016	<b>Papers</b> cc160406 and cc160703b on draft procedures presented to Central Council	Central Council members	Draft procedures discussed and changes suggested
July 2016	<b>Workshop</b> to make amendments to procedures and address any Nature of Service changes	Senior listening volunteers (FLs), RDs, Chair of RDs, some Trustees, core staff	Workshop amendments made and NOS changes into paper for Board of Trustees
August 2016	<b>Paper</b> 160804d presented to Board of Trustees to agree NOS changes	Board of Trustees	Report presented to Board of Trustees
October 2016	<b>Presentation</b> at Council of Samaritans to recap on policy and present	Council of Samaritans	Communicated via presentation, Q&A

	procedures and Q&A session		session and comments box
October 2016	<b>Communication plan and training plan</b> presented to Central Council	Central Council members	Plans presented for information
November 2016	<b>Presentation at Joint Regional Officers meeting</b>	Regional Officers	Presentation
November 2016	<b>Resource pack for branches</b> about rationale, timeline.	All volunteers	Branch hub and Samsnet resources uploaded with information and timeline
November - December 2016	<b>Information</b> about policy being introduced, timeline	All volunteers	Sams News Monthly (newsletter), Samaritans News magazine
December 2016	<b>Final version of procedures</b> provided to BOT for comment	Board of Trustees	Final paper provided
December 2016	<b>Policy and procedures</b> available to senior volunteers	Regional Directors Functional Leads Branch Directors	Via Samsnet and the Weekly Update
January 2017 - March 2017	<b>Safeguarding information</b> (ongoing updates about the work) provided	Regional Directors Functional Leads Branch Directors	Weekly Update (emailed) and Samsnet
February 2017	<b>Policy and procedures</b> communicated more widely	All volunteers	Samsnet and Training Resources, Sams News Monthly (newsletter)
February - April 2017	<b>Training:</b> E learning module launched and face to face training materials available. Went live on 16 <sup>th</sup> February.	All Samaritans people	Link to Learning Zone sent via Weekly Update, Sams News Monthly (newsletter) and on Samsnet pages.
April 2017	<b>Policy launched</b>	All volunteers	Samsnet and safeguarding inbox, FAQs, email from Chair of Trustees to all volunteers
April - June 2017	<b>Bedding in period</b>	All volunteers	Samsnet and safeguarding inbox, FAQs, Weekly Update, Sams News Monthly (newsletter), Samaritans News magazine

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From April 2017 - present	<b>Weekly update</b> statistics and information direct to senior volunteers, and made available to all volunteers on Samsnet	Regional Directors Functional Leads Branch Directors and all volunteers	Weekly Update, Samsnet updates, FAQ updates
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## Chapter 3: Safeguarding policy and procedures

### 3.1. Development

#### 3.1.1. What worked well?

- Respondents to the process survey were asked to comment on ‘What worked best about the development process?’ Please note that respondents to the branch survey were not specifically asked what worked well with the development, so some positive views from branches may not have been captured. Free-text answers from respondents to the process survey included:

- The variety and types of people involved in the development process (7)

“Lots of people in the room representing different specialisms and experience in/around the organisation.”

- Having enough time and opportunity for those involved to feedback (4)

“All involved were given time and views heard.”

- Clear focus and aims throughout the development process (3)

“Clear aims of each workshop meant work was targeted to ensure progress was made and time was well spent.”

- Other one-off comments about things that worked well included good project management, a constructive problem solving approach, commitment and hard work of those involved, testing procedures against scenarios.

“There was a constructive, problem solving approach. People were largely in agreement and keen to achieve relatively simple solutions.”

- The use of workshops was well received – the majority (76%) of respondents to the process review survey felt that *‘holding workshops was the most effective way to develop the procedures’*.
- The choice of people involved (e.g. Trustees and leads of all aspects of the organisation involved) was well received – the majority (76%) of respondents to the process review survey felt that *‘the right Samaritans people were involved or invited to be involved in the development of the policy and procedures’*.

#### 3.1.2. What could have been improved?

- Respondents to the process survey were asked to comment on ‘Could anything have been improved in the development process?’. Free-text answers from respondents to the process survey included:

- More consultation and input from branch volunteers (10 respondents). Although respondents to the branch survey were not specifically asked their views on the development process (as they were not involved in the development), 4 suggested that there should have been more consultation and input from volunteers.

“More involvement of non-senior volunteers i.e. interested parties so we have not just a high-level perspective.”

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“Additional feedback and wider conversation with other volunteers outside the working group could have improved development of, along with support for, the policy.”

- Piloting or testing the policy and procedures before being rolled-out (5 respondents). Consistent with these responses, most respondents to the branch survey (80%) thought that the policy and procedures should have been piloted ‘offline’ in a set of pathfinder branches.

“I think we could have been more visible to volunteers as we worked through this, and shared early. Potentially doing more piloting with particular branches to understand what we were likely to run into.”

- Earlier discussion and planning of the training and implementation (2 respondents)
- Respondents to the process survey were also asked ‘Did you feel appropriate time was given to the development of the policy and procedures?’ The majority (59%) of respondents answered ‘No’. It should be noted that over a third (41%) of respondents answered ‘Yes’.

## 3.2. Communication

### 3.2.1. What worked well?

- Respondents to the process survey were asked to comment on ‘What do you think worked well with the communication to the wider volunteer base?’ Free-text answers from respondents to the process review survey included:

- Providing sufficient information and guidance, including the FAQs provided to volunteers (9 respondents)

“A lot of work has gone into updating FAQs and responding to requests for info.”

“FAQs style of dealing with queries. This helped to summarise a number of similar queries, give consistent responses, and head off future potential queries.”

- The use of Samsnet, for example to publicise information (3 respondents)

“Use of Samsnet for publicising availability of materials.”

- Communicating to volunteers via Branch Directors (3 respondents)
- Moderating and responding to comments on Samsnet forums (2 respondents)
- Engaging Branch Directors and senior volunteers early on (2 respondents)

“I think that starting with Branch Directors early at Council was great.”

- Other one-off comments about things that worked well included responding to requests for information, the use of the flow chart and jigsaw puzzle, clarity of information, the hard work of Central Council staff, the variety of communication channels used, and the robust planning and commitment to delivering the communications plan.

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### 3.2.2. What could have been improved?

- Respondents to the process review survey were asked to comment on ‘What do you think did not work so well with communication to the wider volunteer base?’ and ‘What else could have been done in terms of communication to the wider volunteer base?’. Respondents to the branch survey were also asked to comment on ‘What could be done to help with communication in the future?’ Suggestions from these free-text questions included:

- The time in which it was done. Roughly a third of respondents to the process review survey and a fifth of respondents to the branch survey commented that the time between volunteers being informed and the training and implementation of the policy and procedures was too short, and therefore would have preferred if communication had started sooner.

“Communication could have been started a year earlier...Debate could have been invited and managed. “

- Roughly a third of respondents to the process review survey commented that there was a lack of clarity or misunderstanding regarding the proposed safeguarding policy and procedures, and the process for implementing it, indicating that the communication method itself was acceptable, but that the content and amount of information communicated was insufficient.

“Communication in advance was not very specific in terms of what the policies and procedures would be, so while volunteers were aware of the fact of the policy arriving, they were not aware of the detail, and that's where their concerns seemed to be, not in the fact of the policy itself.”

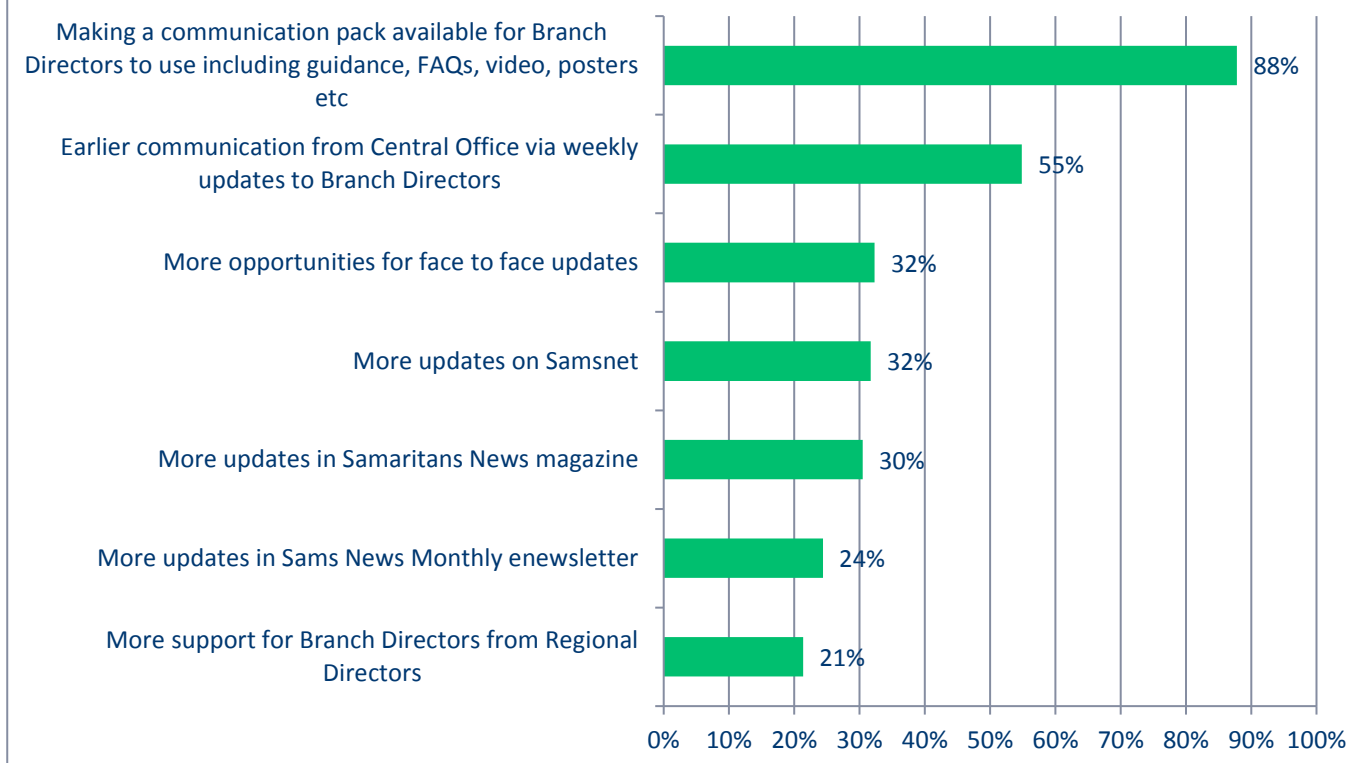
“Only communicate once you know what the policy/procedure is...have everything ready to go before launch so directors have a full pack and aren't communicating "wait and see" to volunteers.”

- Roughly a fifth of respondents to the process review survey commented that Branch Directors were responsible for the poor communication. However, an equal proportion of respondents to the process review survey and roughly a tenth of respondents to the branch survey commented that Branch Directors were ill-prepared and ill-equipped to communicate effectively, answer questions and support volunteers, as they lacked full details of the policy and procedures and the process for implementation.

“Most of the communication with the volunteers tends to be through the Directors. While the Directors were aware of the policy implementation, they suspected that it might be controversial for some of their volunteers, and many felt unable to discuss it until they had more information. They did not feel that they had that until the online training was released. This was too close to the implementation date for them then to arrange appropriate communication within the branches.”

- Respondents to the branch survey were asked ‘What could be done to help with communication in the future?’ and were asked to select from set of options. As shown below, the most popular suggestion was to produce a communication pack for Branch Directors, followed by earlier communication from Central Office via weekly updates to Branch Directors.

**What could be done to help with communication in the future? Please select the answers which would help you most**



- Respondents to the branch survey were subsequently asked to provide free-text suggestions as to what could be done to help with communication in the future:
  - Around a fifth of respondents to the branch survey provided comments suggesting that Samaritans should not rely on Samsnet for communicating to volunteers. The main reasons for this were that not all volunteers use it, it is only appropriate for communicating to IT-literate volunteers, the site is difficult to navigate, and there was a lack of input and moderation on forums.
  - Around a fifth of respondents to the branch survey suggested Samaritans should use other methods to reach and communicate with volunteers including: direct emails from Central Office/Branch Directors, regional meetings for volunteers to discuss with Central Office, displaying posters and leaflets in branches including using more visuals (e.g. process maps); and producing films/presentations for volunteers and branch staff.

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### 3.3. Training

The safeguarding online training module was used to train and inform volunteers and staff about the new policy and procedures. In addition to the mandatory online training module, many volunteers were also given the option to receive face-to-face ongoing training (OGT) in branches - 79% of respondents to the branch survey said their branch had delivered face-to-face training for listening volunteers. Branch Leaders were also provided with training - 97% of respondents to the branch survey said they had provided Leader training.

#### 3.3.1. What worked well?

- Respondents to the process survey were asked to comment on 'What worked well with the training roll-out on this project?'. Please note that respondents to the branch survey were not specifically asked what worked well with the training, so these views were not captured. Answers from respondents to the process survey included:

- The e-Learning, as an innovative and effective way to train a large number of volunteers in a short period of time (14 respondents)

"On line training was an efficient way to train many thousands within a tight timeframe."

- The use of face-to-face training, in addition to the e-learning (7 respondents)

"F2F session, which allowed an open discussion between volunteers. Perhaps this should have been the first training session, followed by the online training."

"The face to face training and leader training appears to have gone down well. The scenarios reassured people and provided an opportunity to answer many questions."

- The role of Regional Training Officers (RTOs) and the commitment of staff who were involved in designing or providing the training (3 respondents)

"The proactive approach the RTO took (with support from the RD) in informing, discussing, supporting, clarifying and in some instances visiting branches."

"Those who designed the training and the wider training team and safeguarding team worked very hard, and worked well together to review the content and meet the deadlines."

- Training provided to Leaders (2 respondents)

#### 3.3.2. What could have been improved?

- Respondents to the process review survey were asked 'Do you feel enough time was given to the roll out of training?'. All respondents (100%) answered 'No', that not enough time was given to the roll out of training.

"Directors felt they needed more time. Leader training would have been better coming much earlier, complete and accurate from the start, and before the volunteer training."

"Please could we allow more time for new policies to be discussed in branches after the training materials and information is available. Branches schedule their training and branch meetings up to 6 months or more ahead and need time to introduce more sessions."



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- Respondents to the branch survey were asked ‘Should we have trialled the training and procedures offline in a set of pathfinder branches first?’ Most respondents (75%) answered ‘Yes’, that the training should have been trialled first.
  - Respondents to the branch survey were asked whether they agreed that ‘Face to Face OGT training should have been mandatory in our branch’. Over half (58%) of respondents strongly agreed or agreed with this, and just over a quarter (26%) were unsure. Over three quarters (79%) of respondents to the branch survey stated that they had delivered face-to-face training for listening volunteers, indicating that most did in fact deliver OGT, though respondents to the branch survey were not asked their views on the delivery of this.

“Mandatory face to face training may have helped to check understanding, a great deal of time was spent answering questions on Samsnet that arose from lack of understanding following the training.”

- Respondents to the branch survey were also asked whether they agreed that ‘Face to Face OGT should have been done first, before the online learning’. Over half (55%) of respondents strongly agreed or agreed with this, and just over a fifth (21%) were unsure.
- Respondents to the process review survey were asked to comment on ‘What did not work so well regarding the training roll out on this project?’. Please note that respondents to the branch survey were not specifically asked what could have been improved with the training, so views from branches are not reflected below. Comments from respondents to the process survey included:
  - The use of eLog (6 respondents). This included technical issues, difficulty accessing or using online training for those with poor IT-literacy or those without access to a pc or internet, and that e-learning is not appropriate to the topic of safeguarding.

“Online training has a place in volunteer training although we might need to accept that not all training is suitable for this medium.”

- Issues with the wording used in the training materials (5 respondents)

“Some of the wording of the scenarios was a bit clunky. ... Could have been clearer that there was no intention for the training to be giving scripts. Explanation needed that the mandatory elements of training had been kept to a minimum following feedback from directors that there's too much mandatory training.”

- Trainers were ill-equipped to deliver the training, and that more notice and preparation should have been provided to trainers (5 respondents)

“It should be cascaded in a manner which will allow trainers to build confidence before having to communicate it themselves. Training works when it is delivered by trainers who are familiar with and understand the material and are committed to its content. Many Samaritan trainers are not experienced professionals. To put them in the situation of having to deliver this training and be in the front line of dealing with volunteers’ reactions to the changes was unreasonable.”

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## 3.4. Implementation

### 3.4.1. What worked well?

- Respondents to the branch survey were asked 'Was the implementation process successful in your branch?' Most respondents (77%) answered 'Yes', that the implementation process was successful, however respondents were not given the opportunity to provide free-text comments, so it is not possible to expand on why most respondents found this to be a success.
- Respondents to the branch survey were asked 'Should Branches have had a clear 'bedding in period' once the policy and procedures were live?' Most respondents (83%) answered 'Yes', indicating they valued the 3-month 'bedding in period'.

### 3.4.2. What could have been improved?

- As mentioned previously, most respondents to the branch survey (80%) thought that the procedures should have been piloted 'offline' in a set of pathfinder branches before implementation.

"I'd have liked to have seen more active debate facilitated with volunteers in the early stages. Many volunteers failed to grasp the pressing need for the policy and procedure and many senior Samaritans people failed to grasp (or acknowledge they had properly grasped) the precise nature of volunteers' concerns. This could have been made much easier by piloting, I believe. It would have helped increase awareness of the raw issues and enabled a fuller response."
- Although respondents to the process review survey were not asked what could have been improved with the implementation, respondents commented on implementation throughout the survey:
  - Roughly a quarter of respondents to the process review survey mentioned at some point that the policies and procedures could have been piloted in advance of full roll-out.
  - As with the communication and training, 5 respondents felt that the implementation was too quick and rushed, which had knock-on effects on training (as mentioned above).
- Respondents to the branch survey were asked how many volunteers in their branch had either resigned as a result of the new safeguarding policy, or had taken a leave of absence. In total, respondents reported that 144 volunteers had resigned (average 0.88 volunteers per branch) and 154 had taken a leave of absence (average 0.94 volunteers per branch), though it is not known if the safeguarding policy and procedures was the sole reason for this or a catalyst.

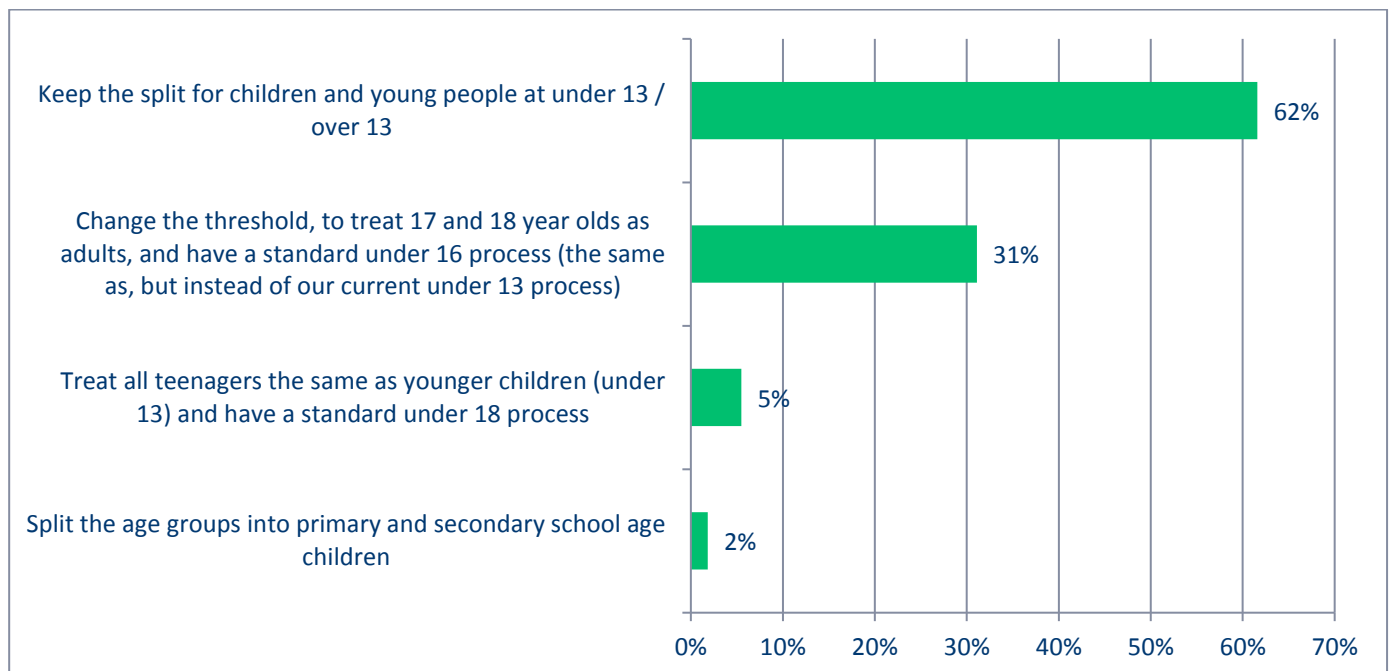
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## Chapter 4: Views and amendments to the policy and procedures

Respondents to the branch survey were asked a series of questions to gather their views about the new policy and procedures.

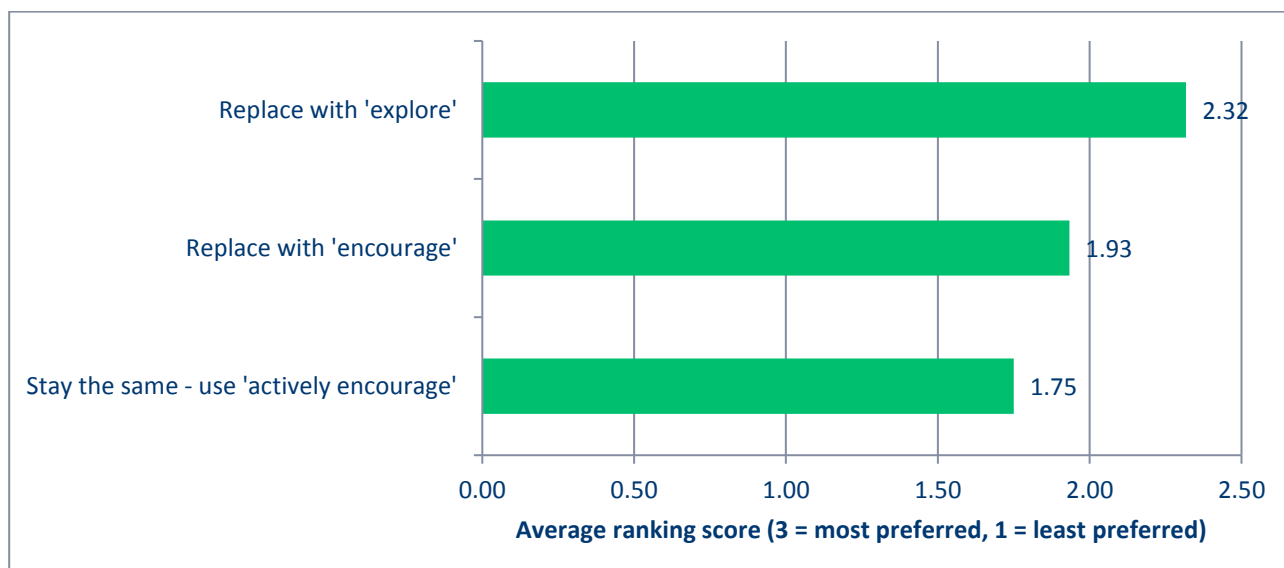
### 4.1. Age distinction

For the safeguarding policy, Samaritans decided to offer different safeguarding to teenagers aged 13-17 experiencing or at risk of serious harm, compared to younger children (under 13). As shown below, the majority of respondents (62%) supported this and suggested to keep the split at under 13/over 13. In contrast, just under a third (31%) instead suggested that there should be one under 16 safeguarding process, and that those aged 17 and 18 should be classified as adults.



### 4.2. Wording

The flowchart in the Safeguarding Procedures and Guidance document uses the term 'actively encourage' on a few occasions e.g. "actively encourage the caller to consider different options available to them". Samaritans received some feedback about the use of 'actively encourage' in the context of supporting younger children, teenagers and vulnerable adults who are unable to make decisions for themselves. In the branch survey, respondents were asked to provide their views on this by ranking, in order of preference, what wording they would like to see used. As shown below, respondents on average preferred the use of the words 'explore' or 'encourage' as opposed to 'actively encourage'.

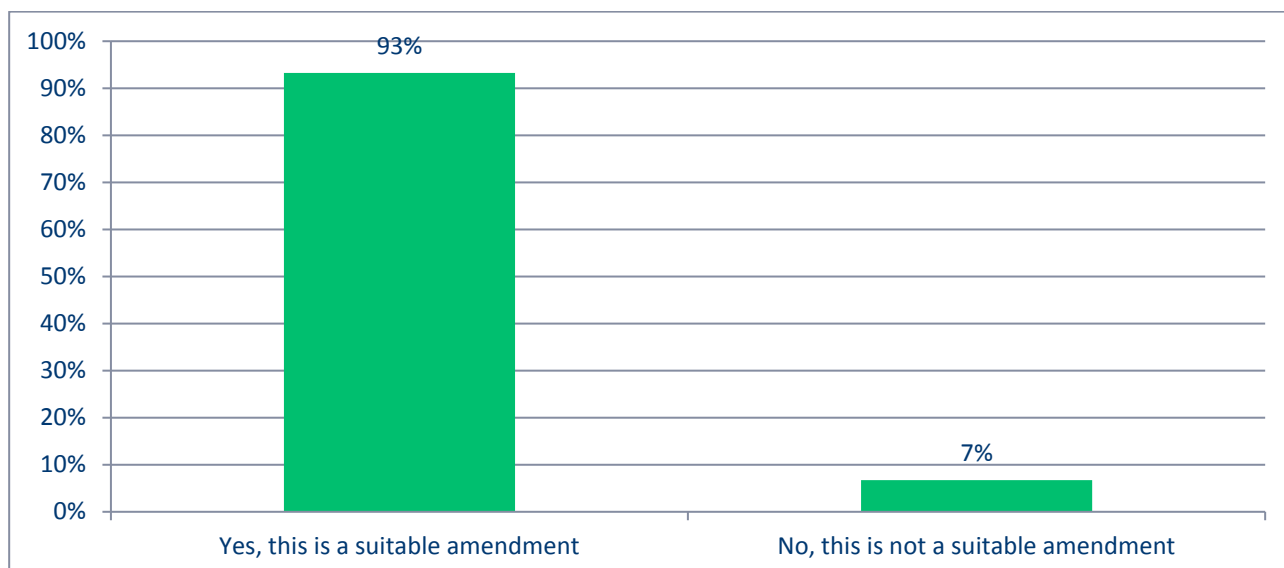


### 4.3. Recording information

For the safeguarding policy, Samaritans proposed a change to the identifying information required in non-urgent situations, so that callers can refer a safeguarding concern outside of Samaritans and ensure that appropriate support for a caller can be sought outside of Samaritans. The information required in current versus proposed processes are outlined below:

- Current: name and phone number/email address - this information could relate to the caller, another person at risk or the alleged perpetrator.
- Proposal: name, phone number, and location (e.g. address, town, organisation) - this information could relate to the caller, another person at risk or the alleged perpetrator.

The large majority (93%) of respondents to the branch survey thought this a suitable amendment. Out of those who did not think it a suitable amendment (7%), alternative suggestions included asking for postcodes so that locations are more identifiable. A couple of respondents also highlighted the need for greater clarity and clear guidelines about when details are needed or not, and the difference between an urgent and non-urgent situation. A couple of respondents also thought the new proposal was too intrusive and that Samaritans should not be recording this level of information.

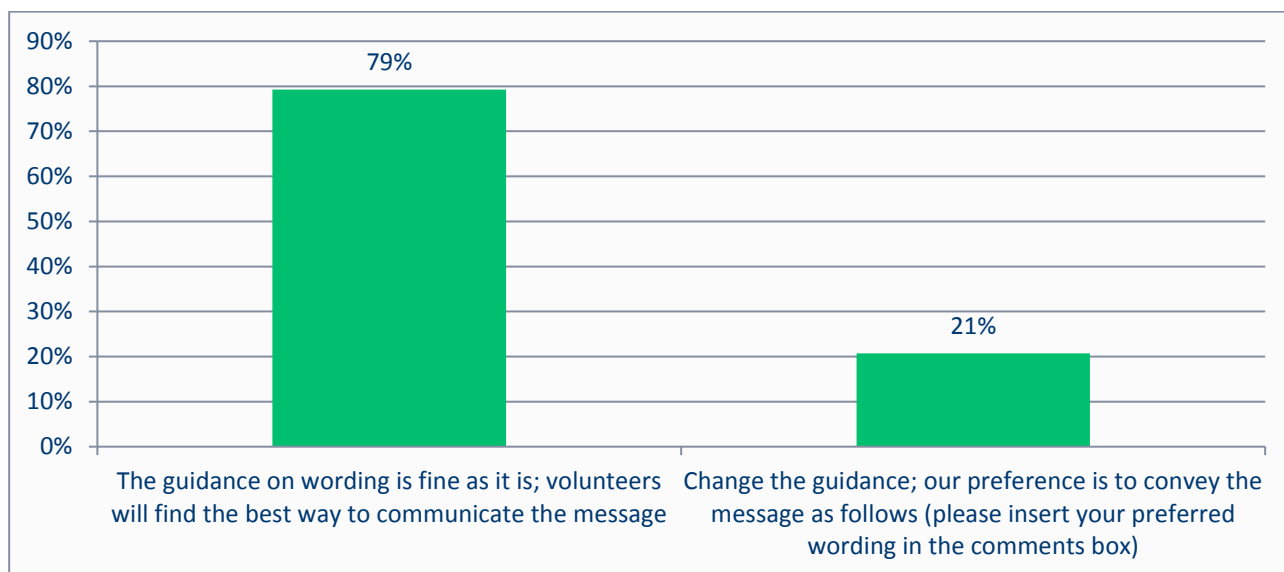


Respondents were asked whether they have any suggestions in terms of improvements for the eLog or Safeguarding Concern Form. The majority of respondents thought the eLog and Safeguarding Concerns Form were good and did not have any suggestions to offer. For those who provided suggestions, these included:

- Simplifying the eLog and making it more use-friendly.
- Allowing more space and adding in additional text boxes to provide further comments, e.g. adding an 'Any other comments?' box.
- Changing eLog so that the Safeguarding Concern Form appears when the safeguarding button is pressed, not at the end of the eLog.
- Provide more clarity and detailed guidance, for example when to tick 'safeguarding' and which fields are mandatory, and providing examples of completed eLogs and Safeguarding Concern Forms.

#### 4.4. Discussing confidentiality

As part of the new safeguarding procedures, volunteers were provided with guidance on wording to discuss confidentiality with callers during a contact. Respondents to the branch survey were asked to give their views on the existing guidance. As shown below, the majority (79%) of respondents thought the guidance on wording was fine. The remaining respondents (21%) suggested the guidance should be changed. Suggestions were mainly that the wording and guidance should be more concise and easier to understand.



## 4.5. Safeguarding outcomes

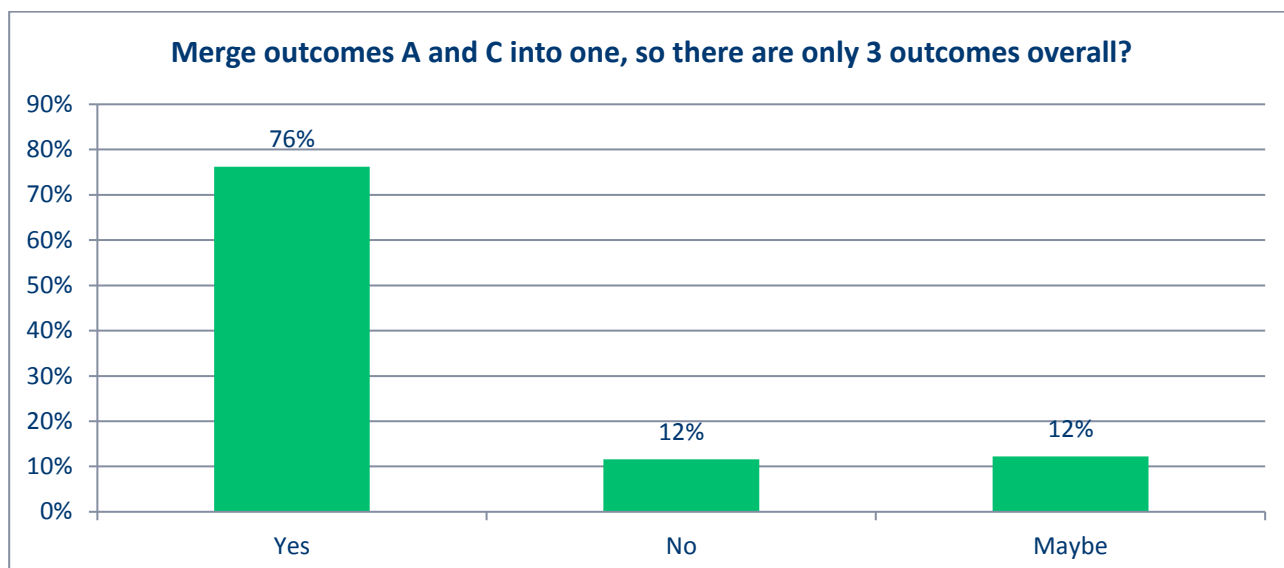
The Safeguarding Procedures and Guidance document provided to volunteers included a flow-chart with 4 outcomes when supporting callers during a potential safeguarding contact:

- A – Caller CAN make their own decision and wants to take THEIR OWN action
- B – Caller CAN make their own decisions but NEEDS SUPPORT to take action
- C – Caller CAN make their own decision but DOES NOT want to take their own action
- D – Caller CANNOT make their own decision and DOES NOT want to take action / or caller is a child under 13

In order to simplify and streamline the possible outcomes, a proposal was included in the branch survey to reduce the outcomes to three options, by combining outcomes A and C:

- A - Caller can make their own decision and does not need/want additional support from Samaritans
- B - Caller can make their own decision and is seeking additional support from Samaritans to refer on their behalf
- C - Caller is unable to make a decision and Samaritans wants to act to protect them. We'd also welcome any other suggestions in the comments box

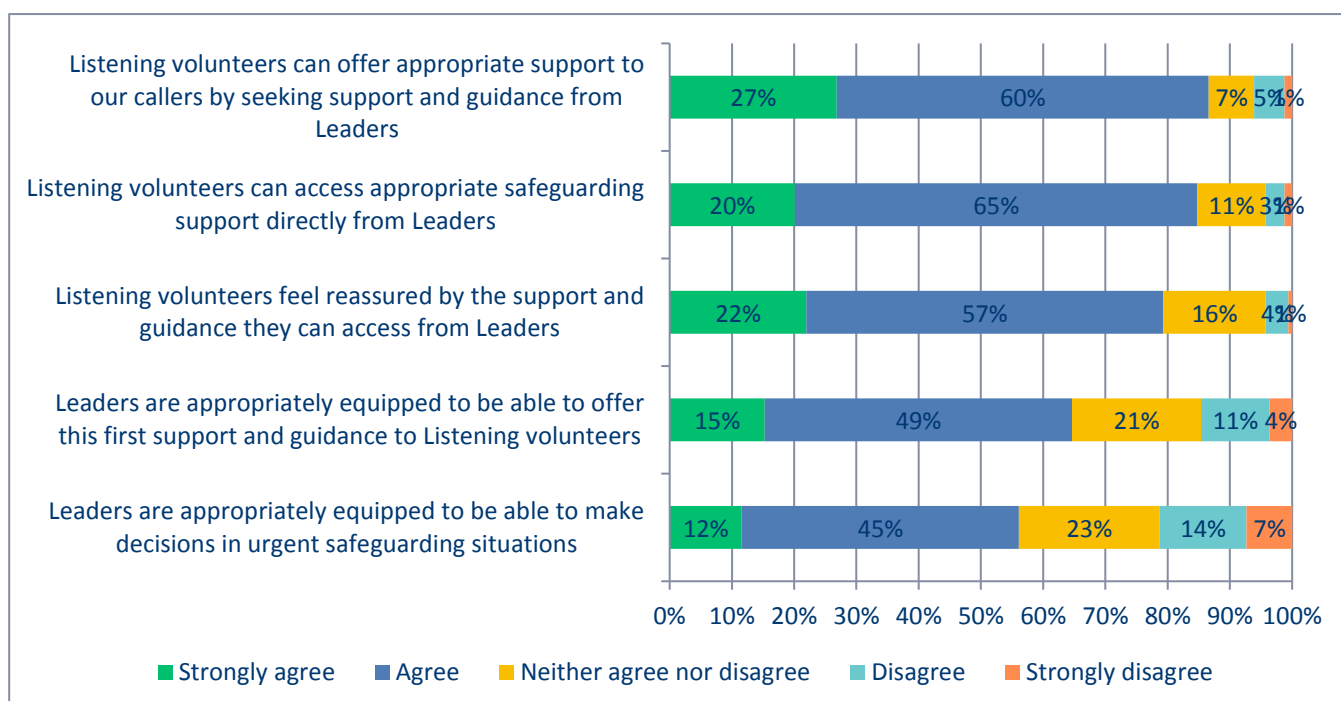
Respondents to the branch survey were asked their views on this new proposal. The majority of respondents (76%) supported the new proposal, that outcomes A and C should be merged so that there are only 3 outcomes.



Forty-two respondents provided further comments on the new proposal and the flowchart. Overall, roughly half of these comments centred around the current flowchart being too complex, lengthy, and difficult to use by volunteers. Respondents suggested that the flowchart should be simplified so that it is easier to use.

## 4.6. Support for volunteers and Leaders

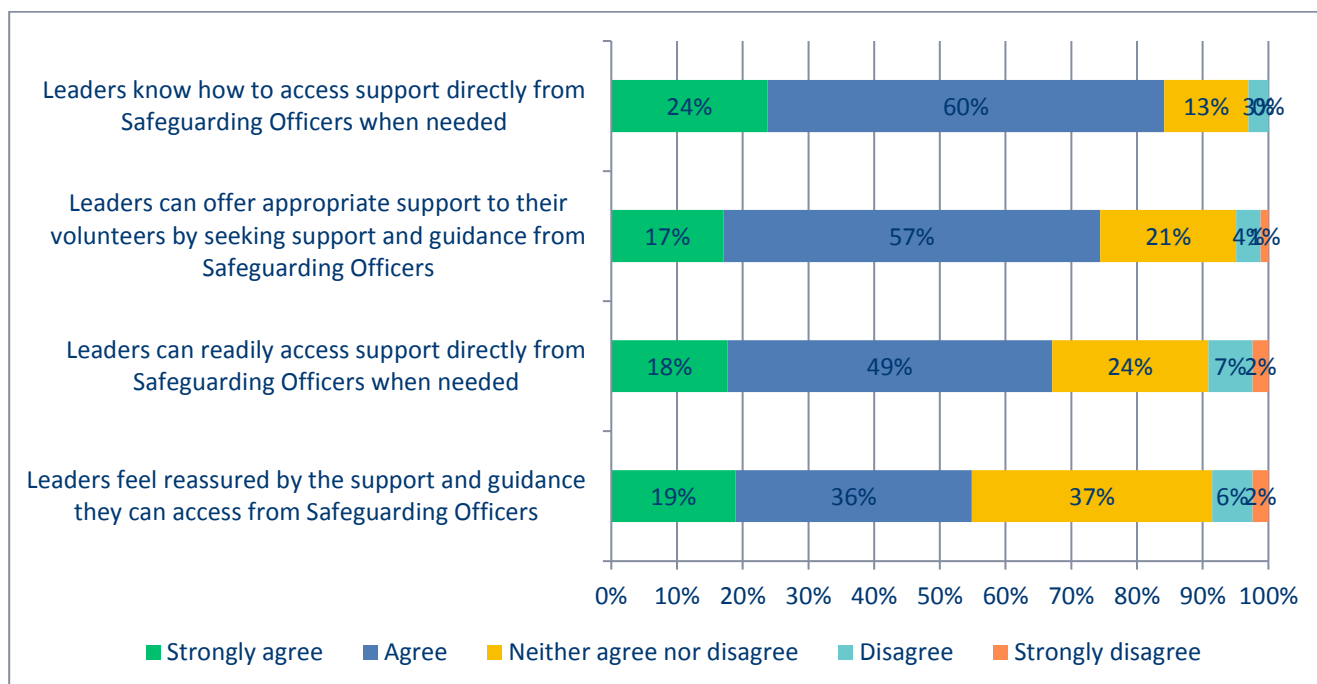
In the safeguarding procedures, it was agreed that Leaders were best placed to continue to be the first point of contact for volunteers when needing support or guidance if a safeguarding concern was identified. Respondents to the branch survey were asked their views about the role of Leaders in providing support to volunteers when dealing with safeguarding concerns. As shown below, respondents on the whole agreed that listening volunteers can seek and access appropriate safeguarding support and guidance from Leaders, and that volunteers feel reassured by the support and guidance they receive from Leaders. Respondents still agreed, but to a lesser extent, that Leaders are appropriately equipped to offer support and guidance and make decisions.



Seventy-three respondents provided further comments.

- Most comments were about the role of Leaders, less so how supported volunteers are. There were mixed reviews about how well-equipped Leaders are to support volunteers. Roughly a fifth of the 73 commenting respondents thought Leaders had received appropriate training and were offering good support to volunteers, an equal amount thought the training to Leaders was poor or that there was still too much uncertainty about the new procedures.
- Roughly a fifth of the 73 thought that the new safeguarding procedures placed too much responsibility on Leaders, particularly as Leaders are also volunteers and are not paid professionals, which may be why some Leaders had resigned from their role.
- Several respondents noted that it is difficult, and sometimes not possible, for volunteers to seek support on the spot during a call. For example, it is not always appropriate to put the caller on hold and seek guidance from a Leader.
- Several respondents said their branch has not received any safeguarding concerns since the new procedures were introduced, and that it is too soon to tell how well-supported volunteers are by Leaders.
- A couple of respondents suggested that listening volunteers should be able to contact the Safeguarding Officers directly if they need guidance, instead of going through Leaders.

Respondents were also asked their views on the support provided to Leaders by Safeguarding Officers (SO), when dealing with safeguarding concerns. The Safeguarding Officer role was created to offer support to Leaders and to ensure that Samaritans can offer consistent and good outcomes for our callers based on appropriate risk assessment and decision making. As shown below, respondents largely agreed that Leaders know how to access, can seek, and can access support from SOs, and on the whole feel reassured by the support and guidance from SOs.



Sixty-seven respondents provided further comments:



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- Roughly a third of the 77 commenting respondents said that Safeguarding Officers, when used, have been very helpful. Respondents valued their knowledge and professionalism, and the support they provided.
  - Roughly a fifth of respondents noted that on occasions, Safeguarding Officers have been difficult to contact or have been unresponsive. In these cases, there is a concern that this causes delays supporting the caller. A couple of respondents said Leaders can feel uncomfortable contacting Safeguarding Officers at night.
  - Roughly a fifth of respondents said their branch hasn't had to contact a Safeguarding Officer or has had little experience working with them.

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## Chapter 5: Key lessons

### 5.1. Consultation

Consultation across all levels of the organisation.

- Many respondents to the process review survey felt consultation was good within the working group and senior volunteers, but that insufficient consultation took place with Branch Directors, Leaders and volunteers.
- Respondents to the process review survey, in particular, thought that volunteers should have been more involved.
- Respondents believed that regional consultation was required.

### 5.2. Timing

Build in plenty of time for training, communication and implementation of new policy and procedures.

- Many respondents to the process review survey felt that the implementation of the procedure was rushed due to time pressures.
- There was a general consensus from respondents to both surveys that one of the key concerns was the timeframe, as many felt it to be too quick and that it was rushed.

### 5.3. Change management and leadership

Good change management, with strong communication around the need, constraints and implications is critical for a large, complex project in a large complex organisation.

- Several respondents to the process review survey felt that good change management was lacking for a project involving immense complexity and controversial change.
- The process required clear information, time for reflection, explanation of the change and why it was needed, time for it to be embedded, and clear training.
- Respondents felt that presentations at Council of Samaritans were too abstract to fully grasp the implications of the change and therefore process them before leading the change, training and roll out.
- Visibility of the CEO, Chair and Trustees to all volunteers in a range of different ways is important. Suggestions included a video/DVD for branches and letters to all volunteers about the roll out.

### 5.4. Communication

Current communication arrangements limit the ability to effectively communicate with all volunteers about complex topics.

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- Respondents to the process review survey and branch survey felt there was an over-reliance on Branch Directors to cascade the messaging.
  - Samsnet was felt to be an effective tool to host information about new developments and procedures but remains limited because not all volunteers use it or find it accessible.
  - A key concern, particularly with the communication and training, was the lack of clarity about the policy and procedures and process for implementation, which in turn caused a lot of uncertainty among volunteers and Branch Directors.

## 5.5. Training

Consideration of a variety of methods for training, and building in plenty of time to roll out training is necessary.

- A key message was that training was rushed, with all respondents to the process review survey stating that there was not enough time given to the roll out of training.
- Although many respondents see potential in using e-learning, in that it can be delivered quickly to a large number of volunteers, some disadvantages were also raised. Notably, some volunteers may not be able to access e-learning or may face technical issues when using it.
- Additionally, results from the process survey and branch survey indicate that e-learning may not be appropriate for complex topics.

## 5.6. Piloting

Piloting of new initiatives should be considered whenever possible in order to ensure a good understanding of the implementation of change and likely concerns from volunteers.

- There was a strong feeling from respondents that the procedures and training should have been piloted ahead of full roll out.
- Respondents felt that piloting of the procedure, training materials and e-learning would have been beneficial and would have avoided some of the strong reactions received.

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## Chapter 6: Next steps

Implementing Samaritans safeguarding policy is as much a change process as it is a new policy. Although training has now been rolled out and all branches are making referrals it is important to acknowledge that this is not the end of the change process for this work. The implementation of the policy will be monitored and reviewed on an ongoing basis in line with best practice.

The results of this review will be shared and discussed with members of Council of Samaritans in September 2017.

The results from the surveys (particularly the lessons learned areas) prompt the need for further discussion and action by the Leadership team to ensure Samaritans embeds learning. A separate piece of work is underway to agree a set of shared behaviours, so we can all work together more effectively in the future. This will also be discussed at Council of Samaritans.

The specific results from the branch survey provide the baseline to make some amendments to the current procedures. This process will be managed and reviewed by a safeguarding working group of key Samaritans people - volunteers and staff - covering the functions of training, communications, operations, caller support and volunteering, as well as the Lead Safeguarding Officers and Regional Directors. A consultation panel of regional and branch volunteers will be set up to engage with prior to final communication with volunteers.

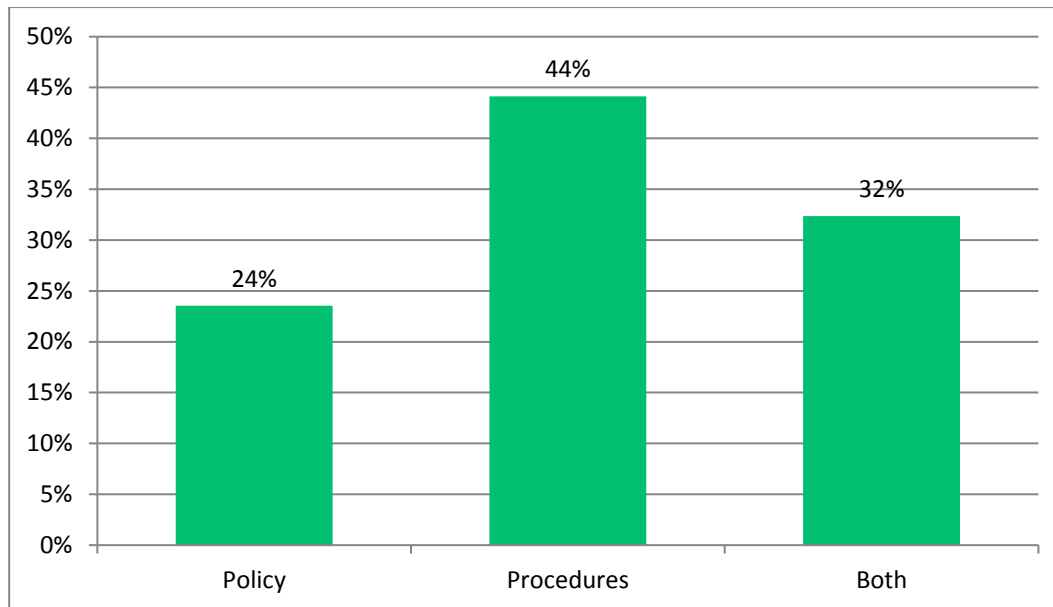
A timeframe for procedural revisions will be provided after consultation with Regional Directors.

## Appendix 1: Process review survey questions and responses

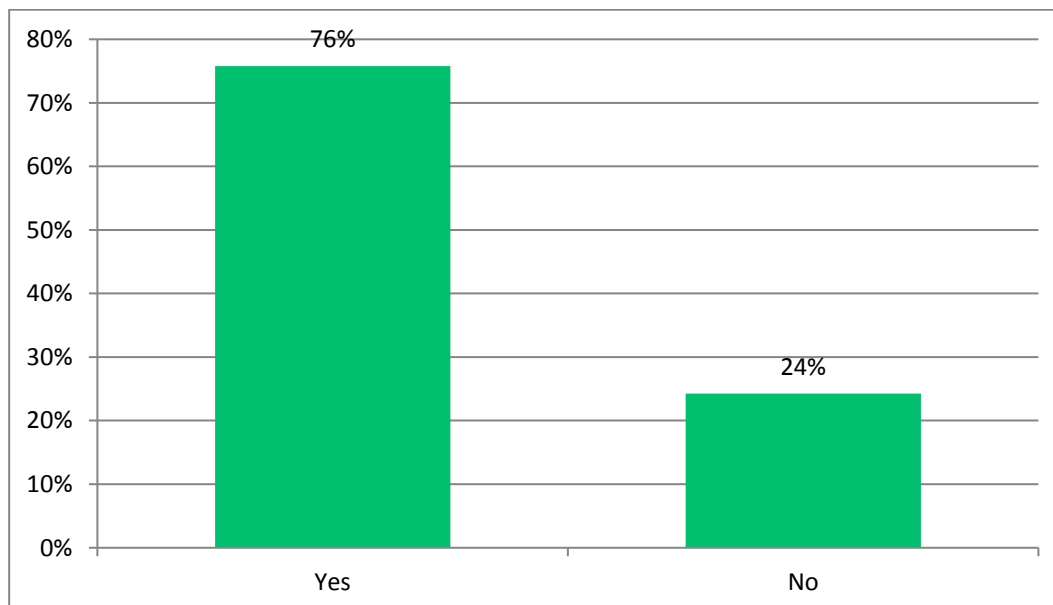
No. respondents: 37

Verbatim replies are saved and available on request

### Q1: Which part of the work were you involved in? (n=34)



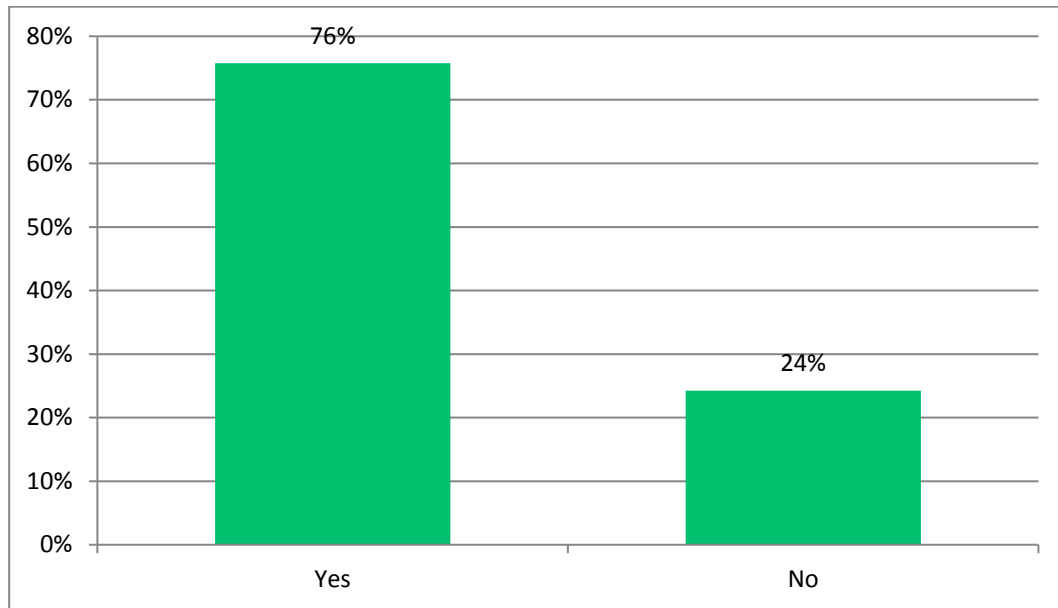
### Q2: Do you feel the right Samaritans people were involved or invited to be involved in the development of the policy and procedures? (n=33)



#### Q2.1: If no who else should have been involved?

13 verbatim responses provided

**Q3: Do you feel holding workshops was the most effective way to develop the procedures? (n=33)**



**Q3.1: If no, what other methods could have been used?**

8 verbatim responses provided

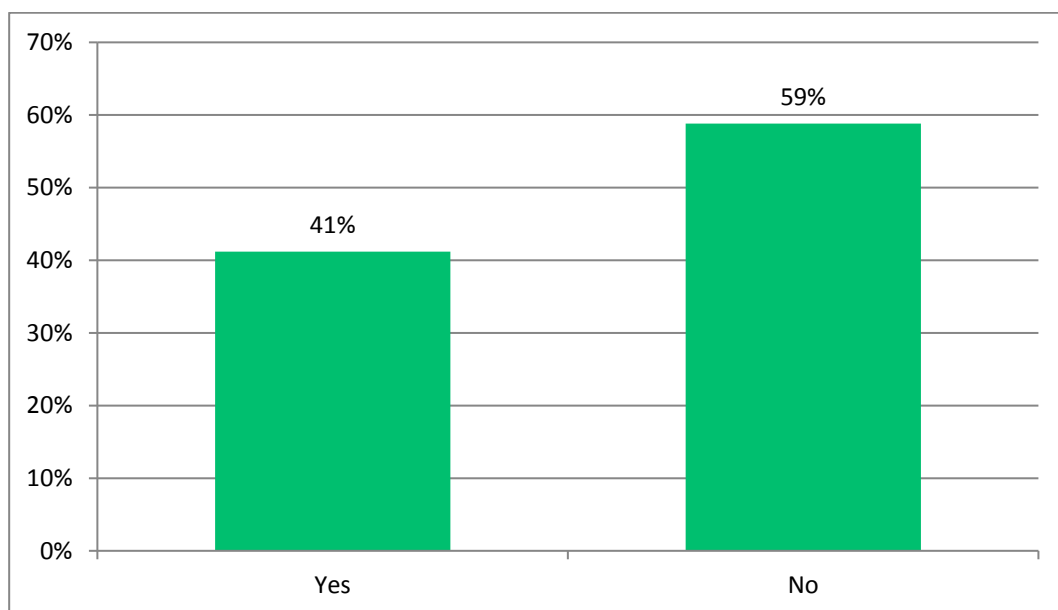
**Q4: What worked best about the development process?**

29 verbatim responses provided

**Q5: Could anything have been improved in the development process?**

29 verbatim responses provided

**Q6: Did you feel appropriate time was given to the development of the policy and procedures? (n=34)**



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**Q6.1: If no please explain**

24 verbatim responses provided

**Q7: What do you think worked well with the communication to the wider volunteer base?**

33 verbatim responses provided

**Q8: What do you think did not work so well with communication to the wider volunteer base?**

37 verbatim responses provided

**Q9: What else could have been done in terms of communication to the wider volunteer base?**

35 verbatim responses provided

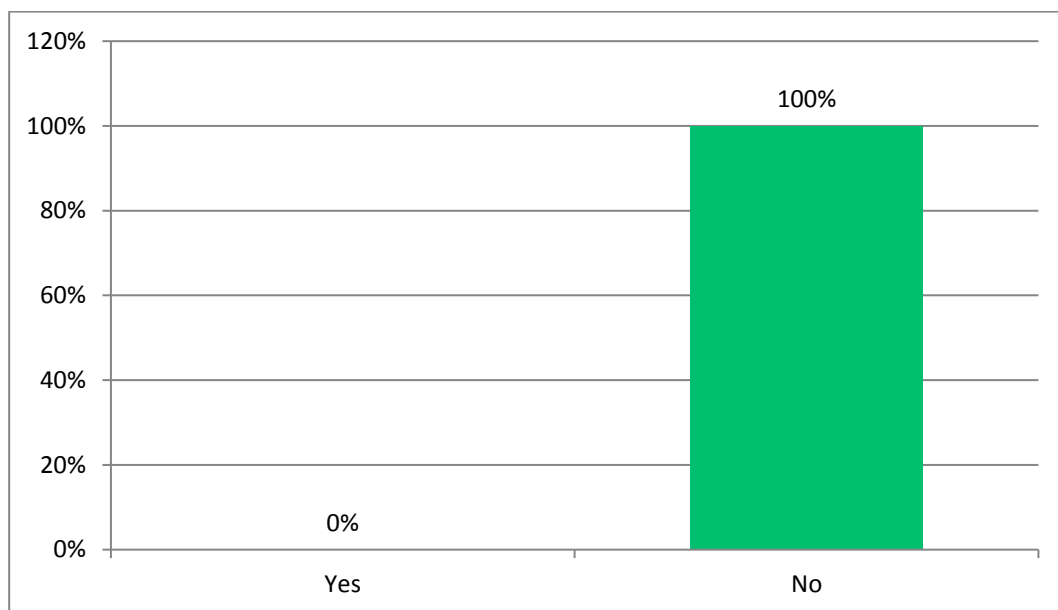
**Q10: What worked well with the training roll out on this project?**

35 verbatim responses provided

**Q11: What did not work so well regarding the training roll out on this project?**

36 verbatim responses provided

**Q12: Do you feel enough time was given to the roll out of training? (n=36)**



**Q12.1: If no, why not?**

32 verbatim responses provided

**Q13: Do you have any other comments you wish to make about either the development or roll out of the policy and procedures?**

29 verbatim responses provided

# Appendix 2: Branch survey questions and responses

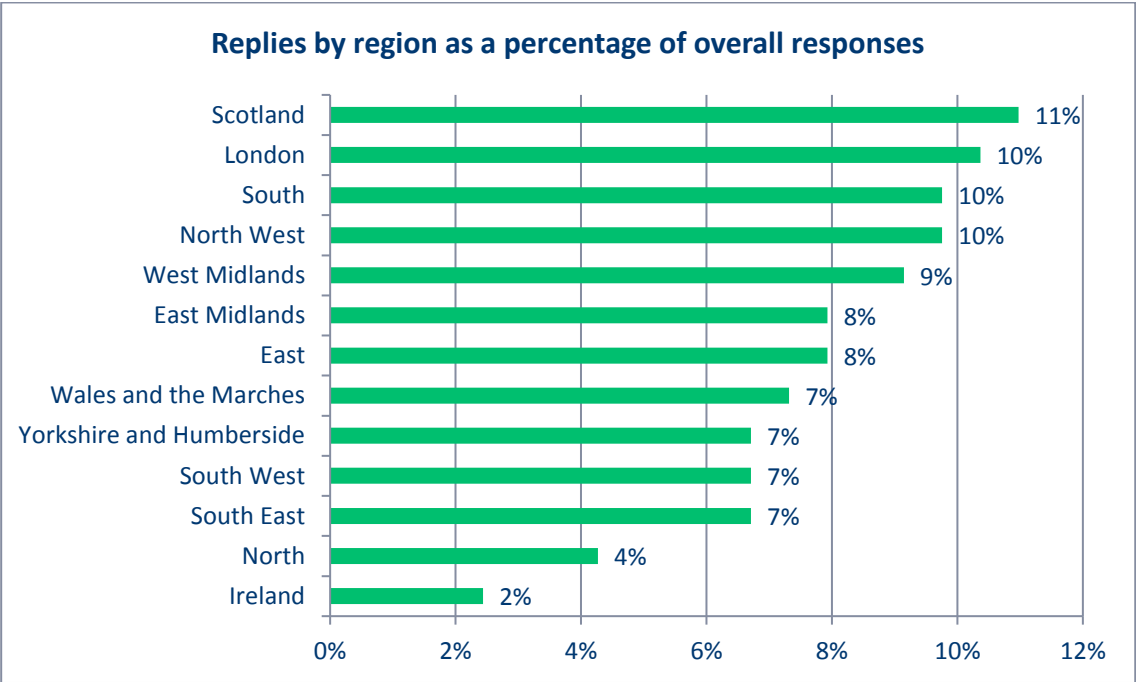
No. respondents: 164 out of 188 (87%)

Verbatim replies are saved and available on request

Q1: Branch name

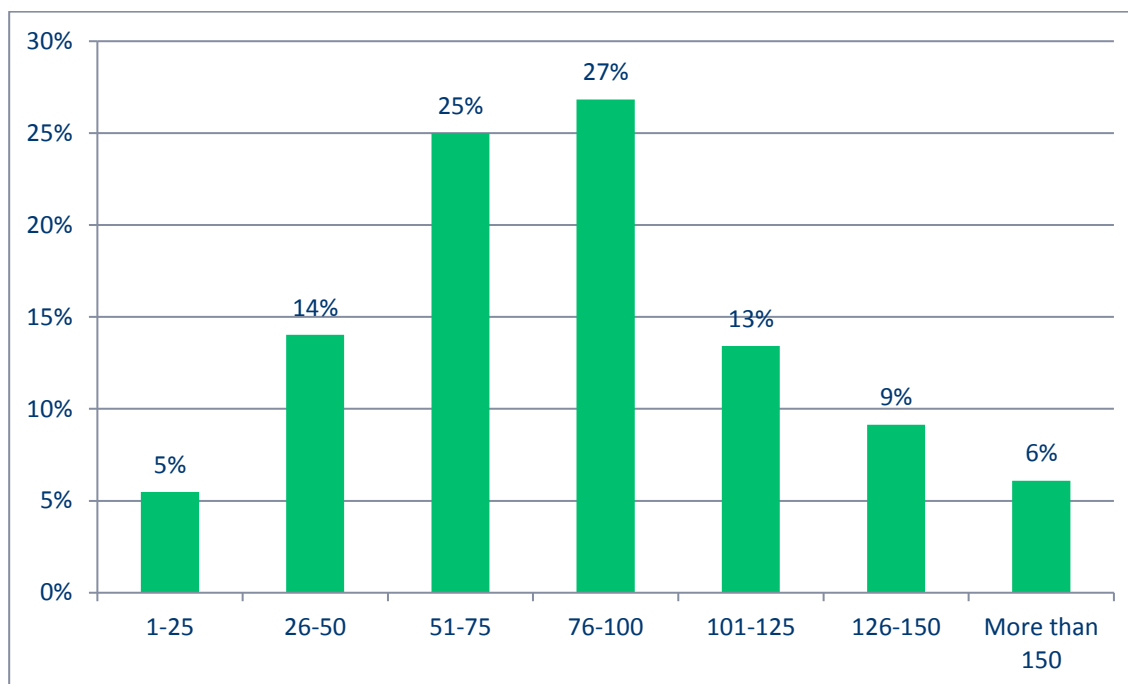
164 verbatim responses provided.

Q2: Region (replies by region as a percentage of overall responses)



Q3: How many volunteers do you have in your branch?



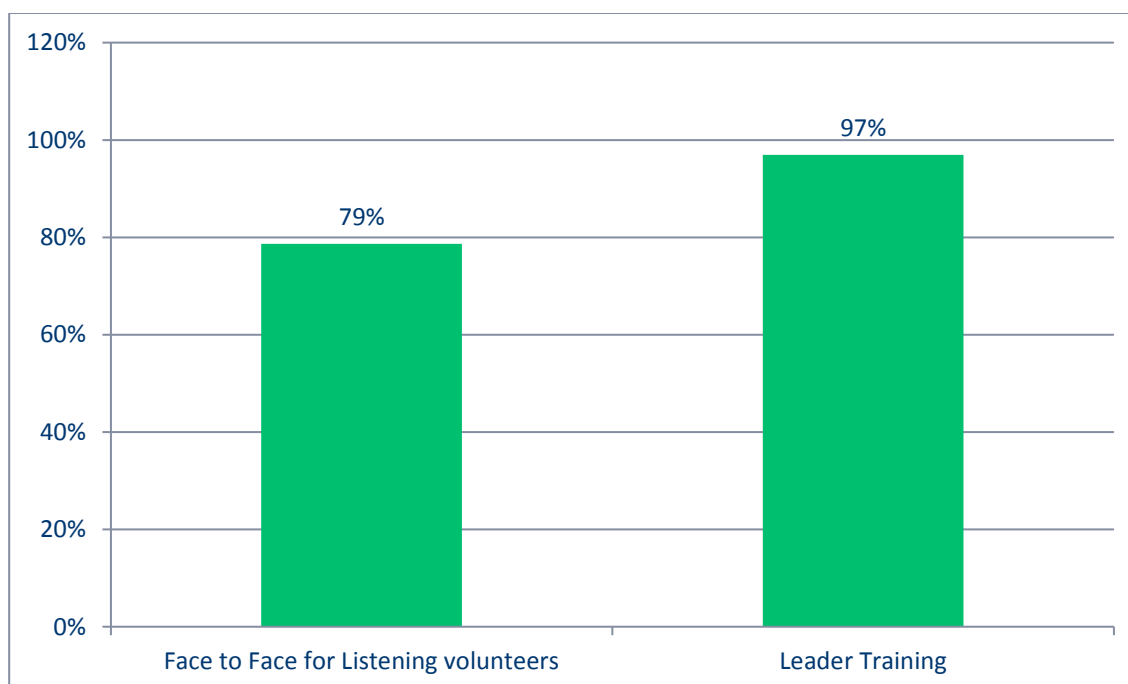


**Q4: How many active listening volunteers do you have in your branch (at the time of completing this survey)?**

Total: 11656

Average: 72 per branch

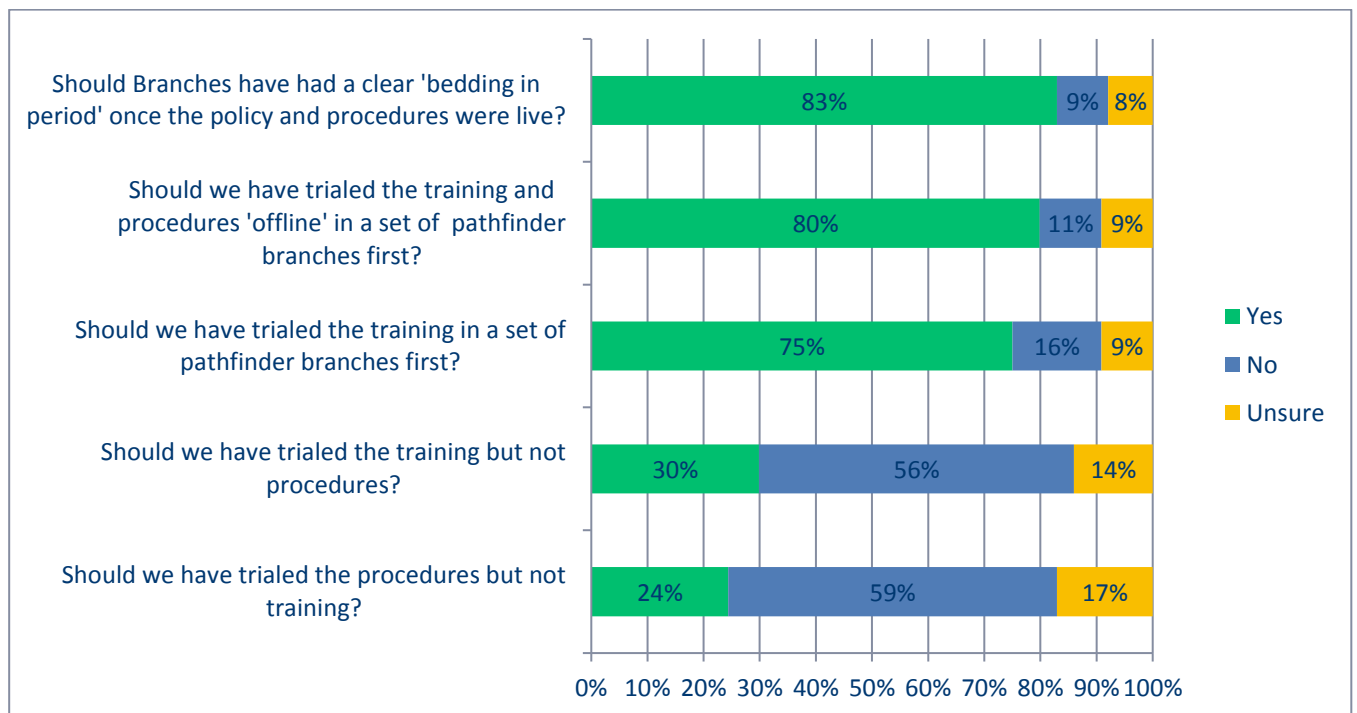
**Q5: In addition to the mandatory online training module, what Safeguarding OGT has your branch run for volunteers to date?**



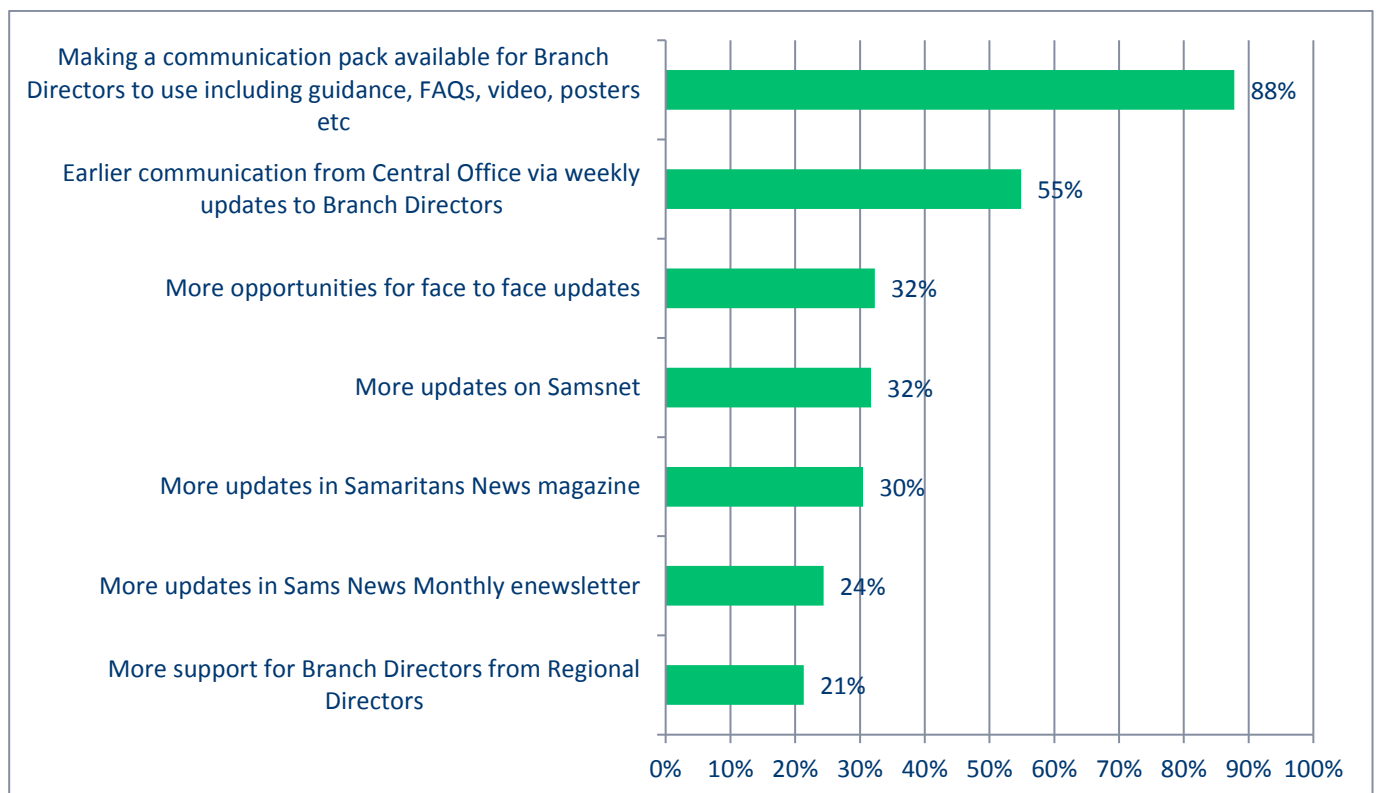
**Q6: Please share with us how you engaged with the volunteers in your branch to complete this survey.**

164 verbatim responses provided

**Q7: We ruled out the option of piloting the procedures live in pathfinder branches, given the need to ensure a consistent approach to confidentiality and self-determination. Nevertheless, we would value your comments on whether the roll out of the policy and procedures was successful in your branch and on what could have been done differently. Thinking about implementation in your branch please answer the questions below.**

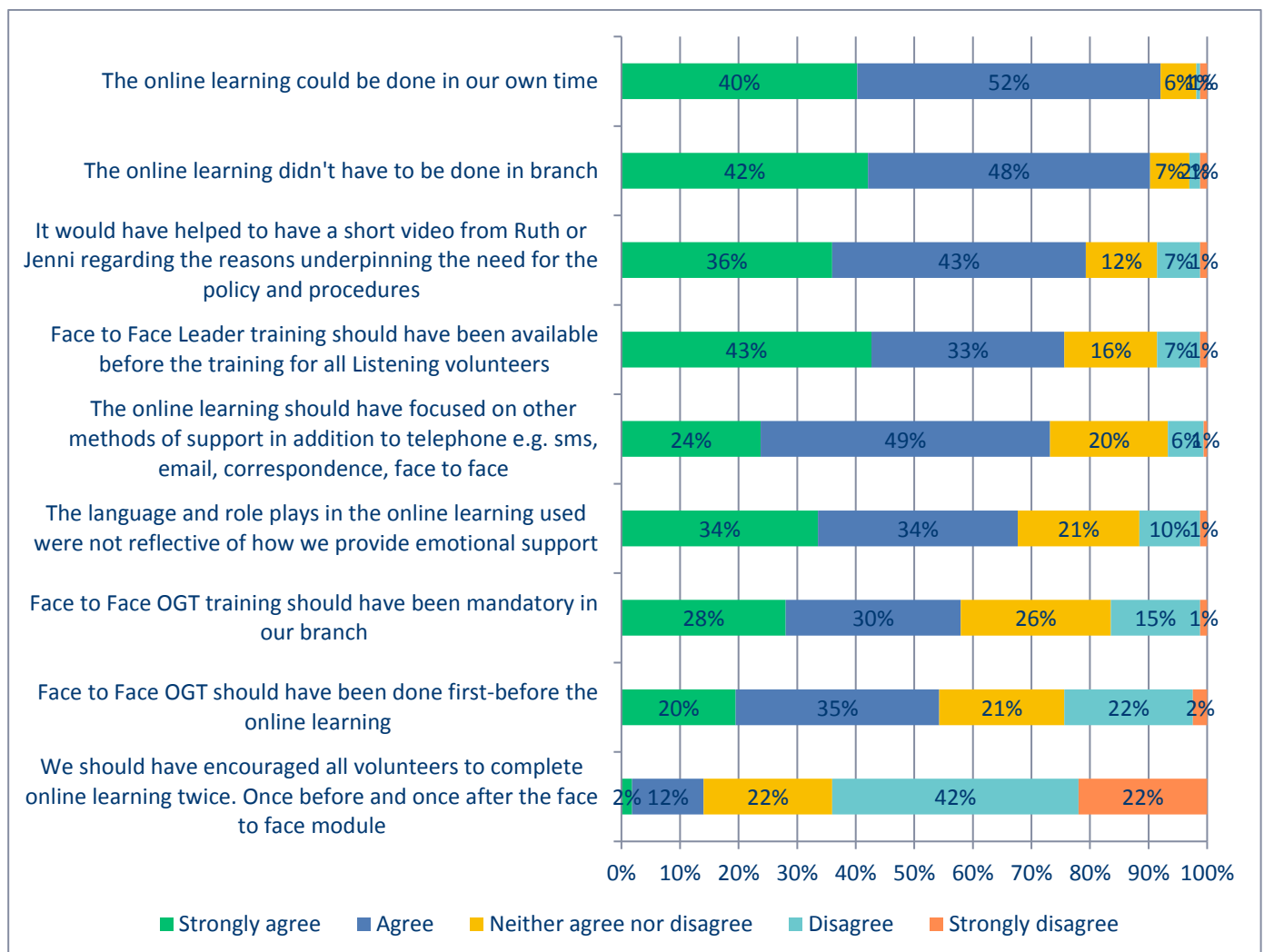


**Q8: We communicated about the policy, both via Branch Directors, Regional Directors and Functional Leads, and direct to volunteers (e.g., through Samaritans News/Samsnet). However, some volunteers did not seem to be aware of the policy before the training was launched. What could be done to help with communication in the future? Please select the answers which would help you most.**

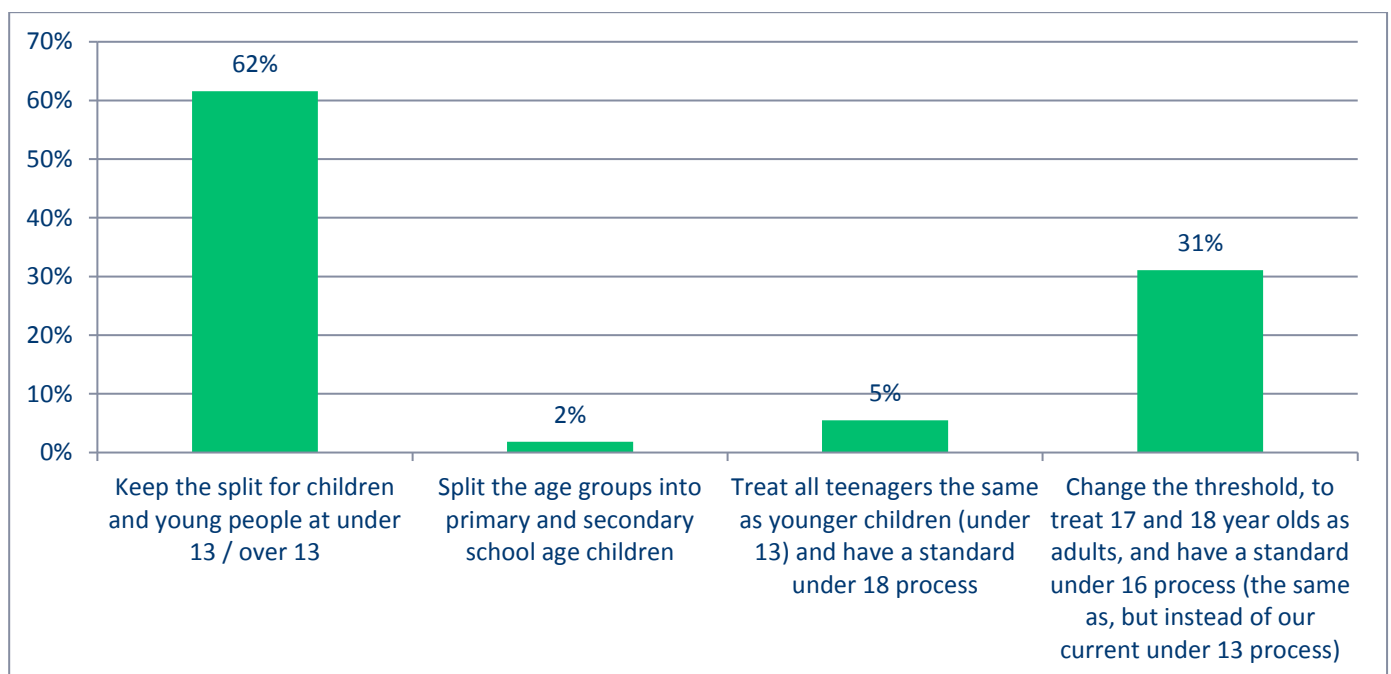


Other: 83 verbatim responses provided

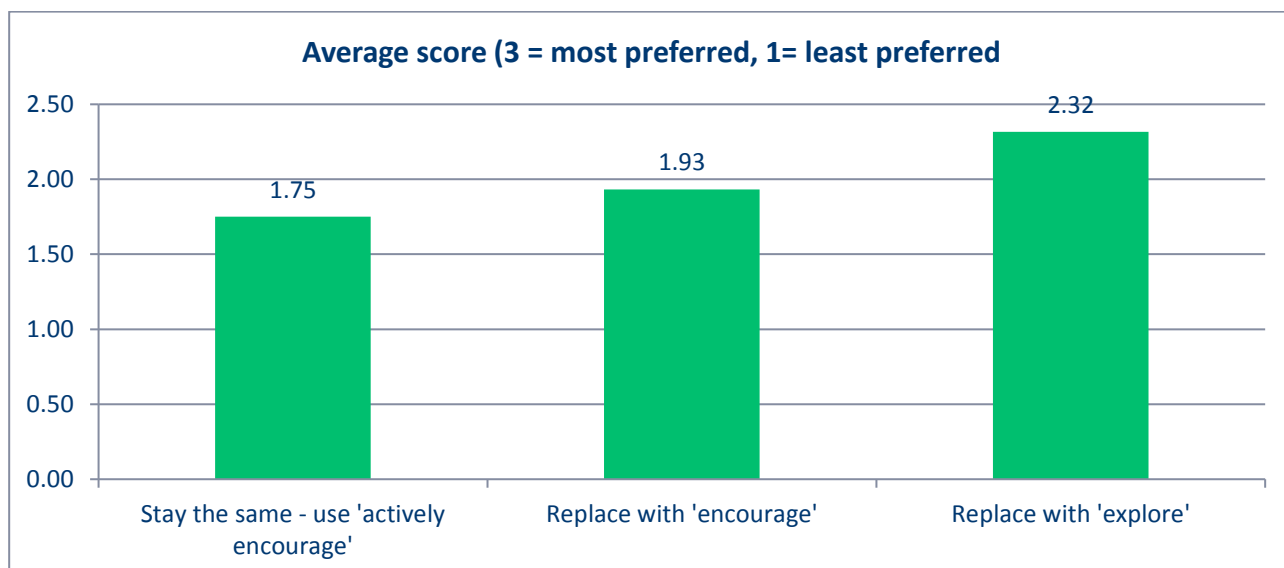
**Q9: It is our intention to increase the use of online learning in future, and to reduce the emphasis on mandatory face to face OGT. The safeguarding online training module was our first attempt to use the methodology for a new and complex subject, and it has received mixed reviews. We would value your comments on the safeguarding training itself, but also with a view to future training more widely. Please use the scale to identify how much you agree or disagree with each statement.**



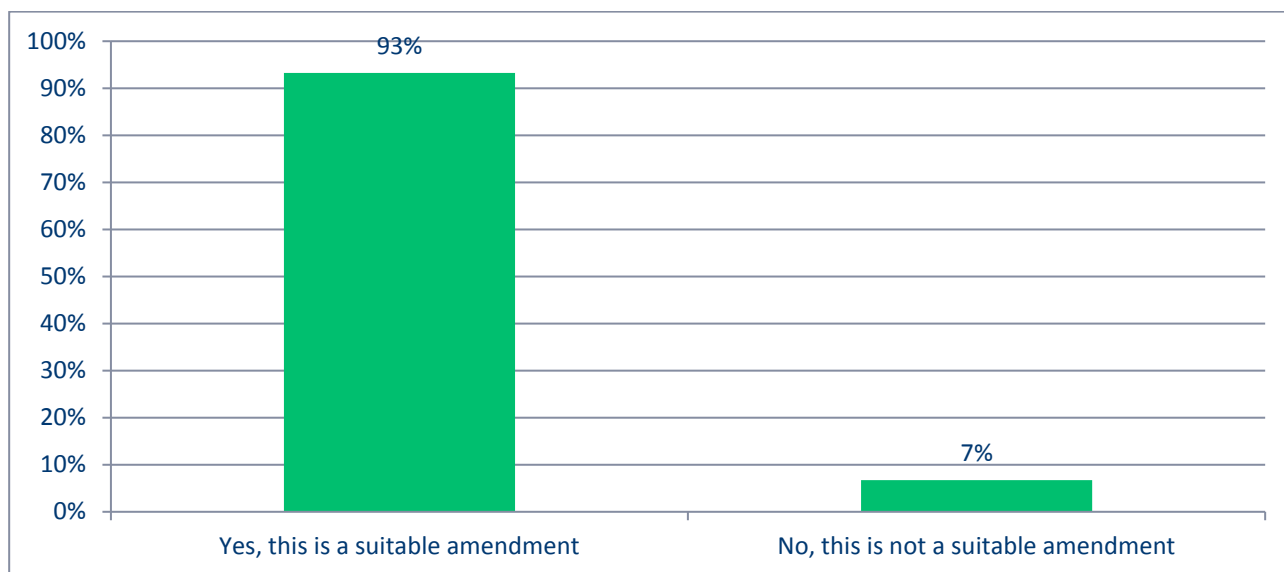
**Q10: Samaritans decided to offer a more flexible safeguarding service to teenagers aged 13-17 experiencing or at risk of serious harm, compared to younger children (under 13). We want to check your views on this. Please select ONE which reflect the views of your branch.**



**Q11: Some feedback has identified dissatisfaction with the use of 'actively encourage' in the context of supporting younger children, teenagers and vulnerable adults who are unable to make decisions for themselves. Please rank in order of preference, what wording you would like to see used (3 for most preferred and 1 for least preferred).**

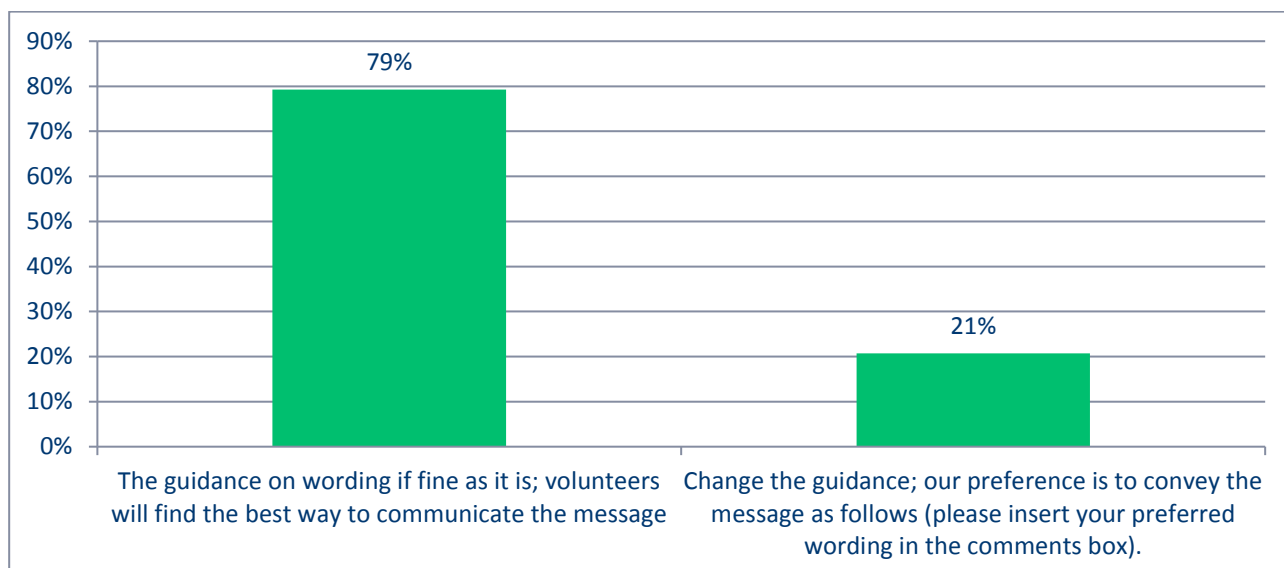


**Q12:** Following consultation with emergency services, we decided that in urgent situations we need an exact location to be able to seek emergency support for a caller, this has stayed the same for urgent safeguarding concerns. From working with the policy, it has now become very clear in non-urgent situations, that a name and phone number or email address is not sufficient information to be able to refer a safeguarding concern outside of Samaritans and ensure that appropriate support for a caller can be sought outside of Samaritans. We also recognise that whilst an email address could be used to make contact with someone, it is not sufficient information to identify someone. We propose a change to the identifying information required in these situations. Current: [Name and phone number or email address]. This information could relate to the caller, another person at risk or the alleged perpetrator. Proposal: [Name and phone number in addition to a location such as an address, town, organisation. This information could relate to the caller, another person at risk or the alleged perpetrator]. Please select ONE option below to let us know if this proposal is supported by your branch. If not please provide an alternative suggestion in the comment box.



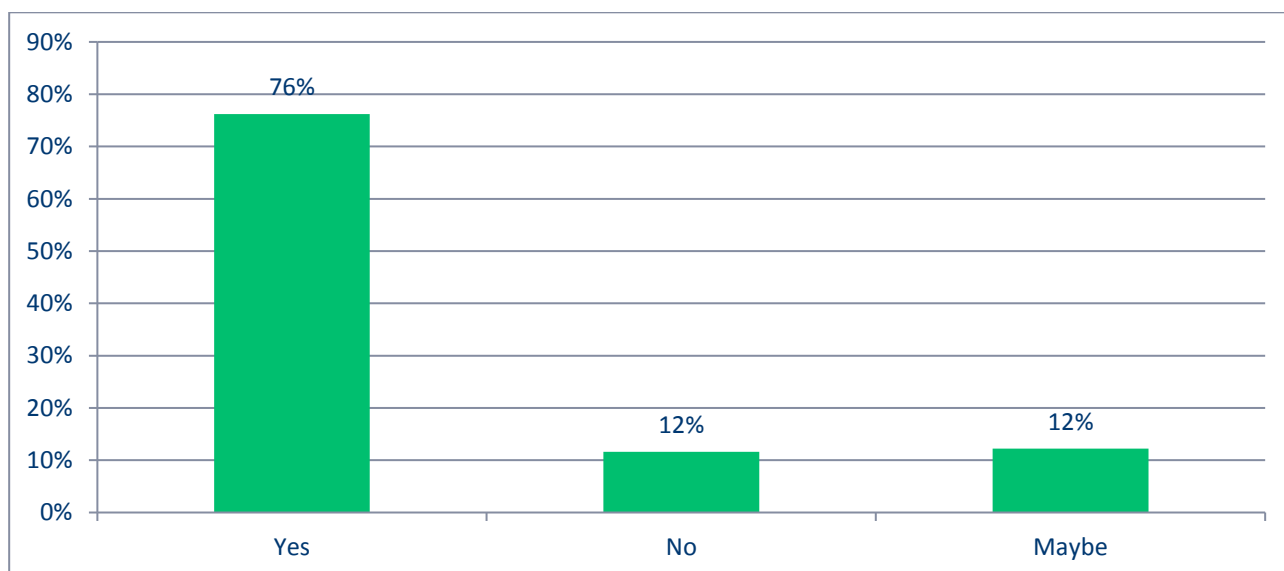
Additional comments: 30 verbatim responses provided

**Q13: The procedures and guidance and the range of training materials provide suggested wording for volunteers to discuss confidentiality with callers during a contact. It has also been made clear that volunteers can find their own words to convey this message to callers. You can review some of the suggested wording here: [Appendix E - Safeguarding Procedures and Guidance Safeguarding: example wording to use with callers](#) Please give us your views on the existing guidance by selecting one of the options below.**



Additional comments: 34 verbatim responses provided

**Q14: Please review the flow chart on p9 of Appendix E - Safeguarding Procedures and Guidance. In order to simplify and streamline the possible outcomes we have a proposal which reduces the outcomes to three options. By combining outcomes A and C, we end up with three possible outcomes which would be: A - Caller can make their own decision and does not need/want additional support from Samaritans. B - Caller can make their own decision and is seeking additional support from Samaritans to refer on their behalf. C - Caller is unable to make a decision and Samaritans wants to act to protect them. We'd also welcome any other suggestions in the comments box. Merge outcomes A and C into one, so there are only 3 outcomes overall.**



Other comments: 42 verbatim responses provided

**Q15: Considering the process available to volunteers and Leaders to raise and record the details of safeguarding concerns in both urgent and non-urgent situations, do you have any suggestions in terms of developments for either the eLog or Safeguarding Concern Form which would make things clearer for your volunteers?**

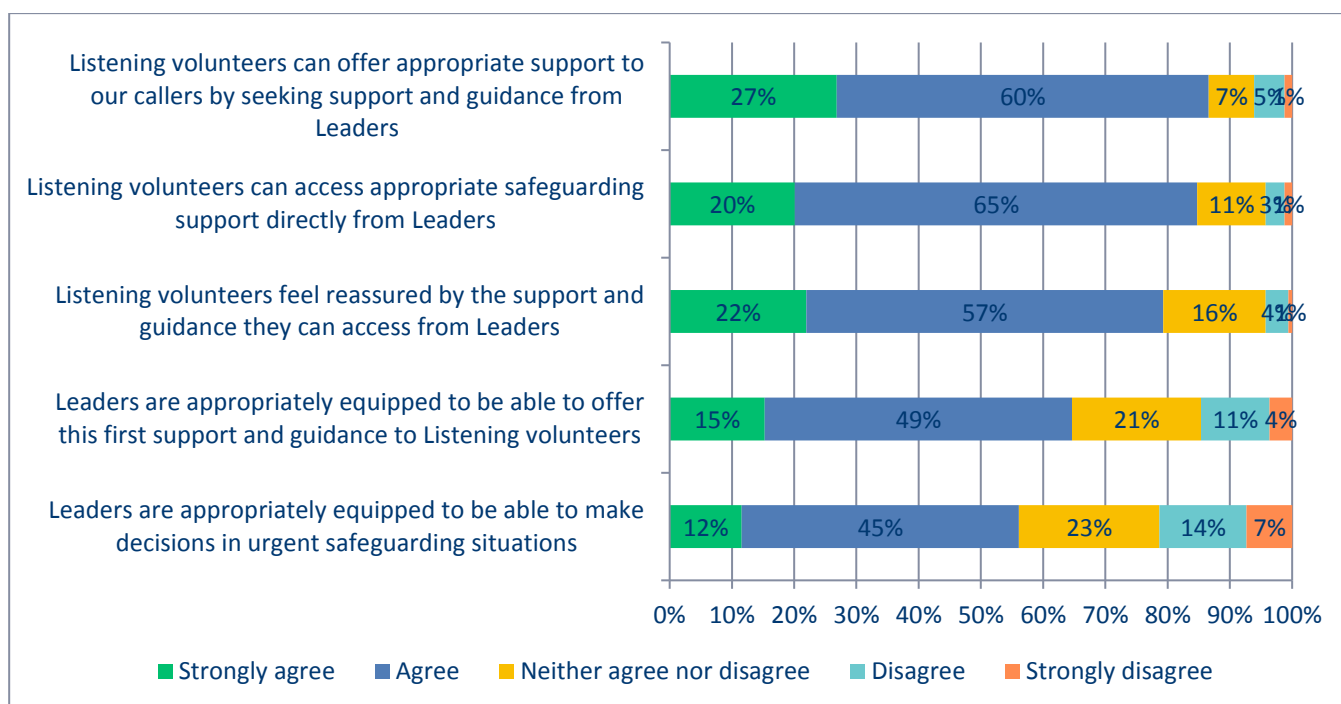
**eLog:** 152 verbatim responses provided



**Safeguarding Concern Form:** 147 verbatim responses provided

**Any other comments about the process?:** 152 verbatim responses provided

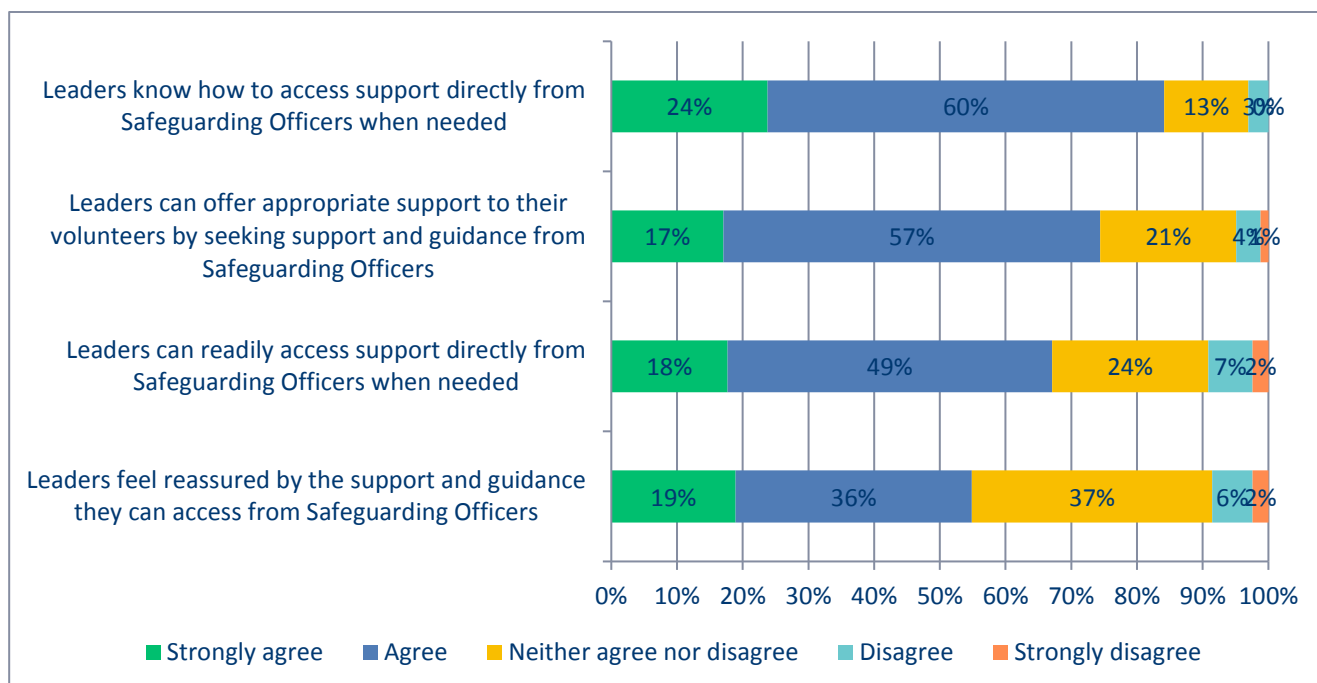
**Q16: We want to ensure that volunteers feel they are supported when dealing with safeguarding concerns. Leaders offer support directly to volunteers during shifts and when debriefing from shifts, in addition to making decisions relating to situations where callers need urgent help from Samaritans. It was therefore agreed that Leaders were best placed to continue to be the first point of contact for volunteers when needing support or guidance if a safeguarding concern was identified. Considering your branches experience of dealing with Safeguarding concerns to date, do you feel that the Leader role is the right role to offer the support volunteers need when dealing with safeguarding concerns, and that Leaders continue to make decisions relating to urgent safeguarding situations (seeking support from Safeguarding Officers if needed)? Please use the scale to identify how much you agree or disagree with each statement.**



If 'strongly agreed' or 'strongly disagreed' with any of the statements please explain your reasons: 73 verbatim responses provided

**Q17: We want to ensure that Leaders are supported when dealing with safeguarding concerns. The Safeguarding Officer role was created to offer this support to Leaders and to ensure that Samaritans can offer consistent and good outcomes for our callers based on appropriate risk assessment and decision making. Considering your Leaders experience of dealing with Safeguarding concerns to date, have we got the role of**

the Safeguarding Officer right? Please use the scale to identify how much you agree or disagree with each statement.



If 'strongly agreed' or 'strongly disagreed' with any of the statements please explain your reasons: 67 verbatim responses provided

**Q18: We understand that some volunteers may have felt unable to work with the safeguarding policy. If you have experienced this in your branch please share with us how many volunteers in your branch have either resigned as a result of safeguarding or have taken a leave of absence (LOA)?**

Total number resigned: 144 (average 0.88 per branch)

Total number taken LOA: 154 (average 0.94 per branch)

