

Inclusion, exclusion and confidential notes.

This note is to help retreat teams understand how inclusion and exclusion is managed at Dhanakosa, and how the confidential notes system works. And, what you can do to help this system work effectively.

How does Dhanakosa pre-retreat screening work

When people book a retreat the Dhanakosa team take care to ensure they are booked on an appropriate retreat, that they are well enough to be on that retreat, that any additional supports required are known before they arrive on that retreat, and that they have realistic expectations of being on retreat.

As a principal retreat leader you can support this process by ensuring the information about your retreat on line is descriptive, and that you agree with the classification of the retreat in our programme.

In most cases people will be able to self-select appropriateness by using the retreat descriptions on line and available from the office, and our additional guidance “are you well enough to be on retreat” (which is brought to people’s attention on the web booking form and available elsewhere online). The decision-making/bookings process invites people with concerns or special needs to contact the office to discuss these and gives guidance as to what issues we would like to discuss prior to booking. Sometimes this may lead to additional communication with the main retreat leader prior to accepting a booking.

However, from time to time people do book retreats that are not appropriate, either because they have not read the information, have wilfully ignored the information, or have not understood that the information available might relate to them!

How does Dhanakosa confidential notes system work

When we have information, either provided by the retreatant, based on our previous experience, or provided by a third party, which is relevant to our ability to manage the welfare or dignity of that individual or others on retreat, or to maintain an appropriate retreat environment for the retreat as a whole, this will be recorded in either the confidential notes section of the database or in a separate confidential note. We have three classes of confidential note:

- One star: this is where we believe it is useful for the team to be aware of an issues but no booking restriction or additional pre booking communication is regarded as necessary. One star notes may be made by any member of the office team and will normally be made on the database but occasionally a confidential note may have been opened if the situation cannot be summed up succinctly

- Two-star: This is when we feel it necessary either to impose a restriction on what sort of retreat someone has access too, or we feel some pre-booking communication is required to be confident that the individual is well enough to be on retreat and can be supported effectively. Two-star ratings can only be given in consultation with the centre director (Nayaka) and will have a separate confidential record associated with them.
- Three-star: this is given when there is repeated experience of significantly disruptive or aggressive behaviour. A three-star rating is a ban. This can only be given in consultation with the trustees and the recipient of the ban will be notified in writing of the ban and the process by which it can be rescinded.

Details of confidential notes will be made available to the retreat team.

It is essential that confidential notes are accurate and relevant. Individuals have a right of access to any information held about them, so it is also important to remember that individuals may also request copy of the notes. If a confidential note includes an exclusion or may be used to justify an exclusion there needs to be a clear “objective justification” noted (see what are reasonable grounds for exclusion below)

How can retreat teams work positively with people who need additional support

Not all additional support needs will be picked up in the pre-retreat screening process or in existing confidential notes and retreat teams are in the front line of managing these situations. Small groups, one to one reviews and general observations will all help you for an opinion as to whether or not you are concerned about an individual’s behaviour or welfare (note, protection and safeguarding is dealt with in the protection of children and vulnerable adults policy and guidance).

In general these situation can be divided into three categories;

- Emergent or previously undisclosed physical or emotional health needs.
- management of disruptive or inappropriate behaviour (for example, failure to hold silence, failure to attend the programmed activities, general disruptive behaviour), or
- Suspected risk of, or actual acute mental health episode

when managing **emergent or previously undisclosed physical or emotional health needs** the retreat team are the front line, but can draw on the Dhanakosa team for support, normally through the duty person who will be conversant with emergency procedures and be able to offer general support. In emergency, contact any member of the team. There is a telephone in the office kitchenette (unlocked at all hours) with a list of first aiders and emergency contact numbers. We also hold individuals emergency contact numbers with retreat bookings forms.

when managing **general disruptive behavioural issues**, the following strategies might be helpful

- Engage with the person, talk to them, find out how it is for them. Most disruptive behaviours are expression in some way of someone’s need, and being “met” with friendliness and a supportive attitude might be enough

- Set clear boundaries. Without being authoritarian let them know clearly what is expected. If possible, nip it in the bud
- Ignore the behaviour. Sometimes you may feel a proactive approach simply will lead to polarization. However, if you choose to ignore the behaviour we strongly recommend you don't ignore the person!

Managing **suspected risk of, or actual acute mental health episodes** is the most challenging. When you think you may be entering this territory, allocate a member of the retreat team you think that person trusts to make contact with them. If you are concerned that the situation may become acute it is best if this is not the main retreat leader as these situations can become quite demanding, and continuity of principal relationship is important. Each situation is unique but in general the following points may be useful:

- Be clear that you have that person's welfare at heart
- Don't be afraid of direct questions (have you been in contact with a doctor? do you have a diagnosis? do you have medication? are you taking it?)
- Find out from them what they need (if they know. Remember the nature of psychosis is that they may well not know. Or, they may wish to conceal the nature of the situation from you)
- Consult with the Dhanakosa team for additional support and advice. Many of the Dhanakosa team have done mental health first aid training and there is guidance material in the office.
- Use NHS 24 (you will need the individuals date of birth, if they are not willing or able to provide this we will need to contact their emergency contact form there booking form to get it). They will be able to access appropriate professional advice and support.
- If you believe there is imminent risk to any person, phone 999, try not to leave the person by themselves, and try not to be alone with them.

NOTE. Any action involving first aid response, or external advice and support (NHS 24, GP, 999) that we access on an individual's behalf should be reported to Dhanakosa senior staff who will record details in the incident book.

NOTE. Any incident or situation where someone could reasonably be considered Vulnerable, and abuse is either reported or suspected, or a situation where you are concerned that someone could be accused of abuse arises, must be reported to the safeguarding officer (Nayaka)

What are reasonable grounds for exclusion, and how are these managed

We will always try to avoid excluding people from retreats. We will always work towards helping people make appropriate choices and making reasonable efforts to give the necessary support for inclusion. Furthermore, there is a legal requirement not to discriminate against people with certain "protected characteristics". All exclusions must be "objectively justified" and defensible if challenged.

However, we may from time to time decline to accept bookings where:

- We cannot reasonably be expected to provide the level of support required

- Where we have reason to be concerned about their welfare or the welfare of others
- Where we have reason to believe that an individual is not able or willing to participate in the programme to a degree considered disruptive to the retreat as a whole (given that a retreat is a shared experience and not just a break for the individual)

It is important that retreat teams feed back to Dhanakosa (normally to Nayaka) their experience of people they are concerned about or have been given confidential notes on. And, what efforts they have made to include or support that individual. This helps Dhanakosa establish a narrative of contact with an individual enhancing our ability to provide appropriate support in the future, reducing the risk of inappropriate exclusion and providing evidence for the “objective justification” for exclusion when necessary.