

# Groups and Services Operational Procedure

<b>This document is relevant to:</b>	
Staff	✓

## Purpose

To explain procedures related to the operation of Groups and Services to be followed by staff.

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## Introduction

Dorset Mind believes that the groups and services it offers should be:

- safe
- professional
- confidential
- supportive
- productive
- fair
- inclusive
- consistent.

Our services will be outcome focused and client centred and Dorset Mind will consistently update its Groups and Services Operational Procedure to accommodate our statutory obligations and also best practice within our sector.

This procedure should be read specifically in conjunction with the Confidentiality Policy, the Health and Safety policy, the Safeguarding Policy and all other Dorset Mind policies.

Dorset Mind groups and services are for those aged 18+ only unless a specific piece of work is being undertaken with children or young people, in which case this will be clearly displayed in any publicity. Anyone under 18 (including a service users' own children) may attend a Dorset Mind service provided that a risk assessment has been carried out by the service leader and submitted and approved by the Chief Executive prior to an attendance.

## Venues

Dorset Mind will endeavour to use community venues which:

- offer appropriate facilities
- are competitively priced
- are environmentally friendly / energy efficient
- accessible
- inclusive.

If a new venue is needed, group members should be consulted about possible options and the advantages and disadvantages of suggested venues. The decision to use a new venue should be made by the service leader, the Service Delivery Manager and the Chief Executive taking the service user consultation into account.

## Work / Group Mobile Phones

Dorset Mind will provide each service leader with a mobile phone and/or a SIM card for use in connection with the running of the service. Reimbursement of phone call expenses will be in accordance with the Dorset Mind Financial Policy.

All Dorset Mind mobile phones and any information recorded on them should be held securely and locked with a PIN. The PIN number should be advised to and recorded in the Dorset Mind office.

All Dorset Mind staff have a right to be treated with respect and Dorset Mind has a zero tolerance to violence (definition below) including when dealing with phone callers.

Service leaders should ensure that the Dorset Mind work/group mobile phone provides a clear message about when messages are taken/calls returned and should include a statement about who to contact if the situation is an emergency. Confidential information must not be discussed in open areas or inappropriate locations.

If a service leader receives a phone call which is intimidating or aggressive or inappropriate the service leader should use their skills to support the caller/diffuse the situation but if this is not appropriate, then they should terminate the call and advise the Dorset Mind office.

## Referral

The referral criteria for accessing a service offered by Dorset Mind will be determined by:

- a) any conditions in place in respect of the funding underpinning the provision of the service, and
- b) the aims and objectives of Dorset Mind.

Service leaders should satisfy themselves that a potential service user satisfies the referral criteria for that service.

## Registration

- a) Dorset Mind recognises it's duty of care to its service users and will, therefore, ask for service users to provide personal contact, General Practitioner and emergency contact information. Dorset Mind also recognises its duty of confidentiality to its service users and will not disclose to any third party details regarding a service user or their attendance at a group, other than in an anonymised format.
- b) Dorset Mind needs to record attendance data in order to meet funding obligations. However, any information on attendance submitted to external organisations will be presented in an anonymous format.
- c) New service users will be asked to complete a registration form. The service leader will return the original of the form to the Dorset Mind office for safekeeping and will keep a second copy of the front page to use to enable them to hold basic contact information for a group member. All new attendees will be given a Dorset Mind Service User induction pack which will include information about contacting the group mobile phone, condensed information about safeguarding, confidentiality, record keeping, etc, what to expect from the service, etc).
- d) Record Keeping
  - (i) Service leaders are required to complete a monthly attendance sheet and submit this to the Dorset Mind office on a timely basis.
  - (ii) Service leaders are required to complete a monthly return to the Service Delivery Manager in respect of the current outcome monitoring method.
  - (iii) Any registration forms that are carried by service leaders to group meetings must be carried securely and must only ever use a reference number to identify the service user. All master lists cross referencing reference numbers and service user identities must be held securely by the service leader and separately from the registration forms.
- e) On a quarterly basis, service leaders must deposit recent original registration forms to the Dorset Mind office where they will be held securely in a locked cabinet. On a quarterly basis, service leaders must arrange to annotate registration forms where the relationship with the service user has changed, ie where they cease to use that Dorset Mind service, with a destroy date of 3 years. On an annual basis, service leaders should destroy those registration forms due for destruction.

## Evidencing Outcomes

Dorset Mind is committed to promoting recovery and social inclusion for people with mental health problems. In order to ensure that all its services meet these aims, Dorset Mind will identify measurable indicators of recovery and record the progress of its service users in this regard.

- 1 Service leaders should, in consultation with their service user, identify measurable outcomes that may be achieved by attendance at their service and from time to time review these outcomes with their groups.
- 2 Group members should discuss with the service leaders their current state of recovery and social inclusion.
- 3 Service leaders should ask group members which of the possible outcomes of the service they are hoping to achieve by attendance at the service (including any "other" achievable outcomes). This information will be recorded for each group member and service leaders must ensure that the service user has a copy.
- 4 Service leaders should at quarterly intervals review the situation of each service user and update their progress.
- 5 Copies of records should be returned to the office for analysis at quarterly intervals.

## Group Rules

Dorset Mind recognises that it is important the group members have an active role in the guidelines and regulations for the group they attend. Each service leader will draw up a set of group guidelines in consultation with the group and the members. The Service Delivery Manager will ensure that there is consistency across the groups.

Each service leader will facilitate their group to draw up group rules/guidelines and will review these rules with their group from time to time. Each new member may be asked to sign two copies of the group rules for the group they attend and should keep one copy for their own reference

## Group Funds – Tea and Coffee kitties

If a Dorset Mind service sells tea/coffee/refreshments it should clearly state the price of the refreshments and a record kept in order to show solely the sales and expenditure of replenishing supplies and maintained on an imprest system. Any other income received at a group or service will be considered as a donation to Dorset Mind.

Surpluses in excess of the designated impress amount must be returned to Dorset Mind for banking and will be treated as unrestricted donations.

Purchases for sundries for use at a group (eg craft supplies) should be approved by the Service Delivery Manager in advance and claimed back using a Dorset Mind expenses form. The maximum amount that the Service Delivery Manager may authorise is £20.

On an annual basis the price of tea and coffee will be agreed by the Chief Executive and Trustees.

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Service leaders should submit information on a monthly basis regarding tea and coffee sales and expenses via the Staff login area on the Dorset Mind website

Tea and coffee floats should not exceed £50.00 in cash at any one time and any surplus should be brought to the Dorset Mind office and will be banked in the Dorset Mind account.

If a Dorset Mind service or group ceases to continue, any funds held by that group at the time of the closure will be deemed to be a donation to Dorset Mind.

## Events and Activities

Dorset Mind is keen that the activities and events organised from time to time by its services meet the needs of the group members and are inclusive and promote mental well-being.

Service leaders should consult with the group on at least a quarterly basis to formulate a general plan for the events and activities the group will undertake in the forthcoming months. It is important that service leaders are sensitive to the needs of the whole group and take into consideration suitability, inclusivity, risk assessment and any financial implications for members

## Visitors / Researchers

Dorset Mind respects the confidentiality and possible vulnerability of its service users and as such discourages visitors wishing to carry out research/observation unless appropriate ethical approval has been obtained and can be evidenced, however, Dorset Mind actively encourages our service users (if they so wish) to share their experiences and reduce stigma.

If a request is received from a researcher to attend a Dorset Mind group, it should be politely declined and suggested that it might be possible to ask if anyone in the group would be prepared to meet the researcher independently from the group time (but with no endorsement from Dorset Mind).

## Exclusion

Dorset Mind is an inclusive organisation and is sensitive to the individual needs of its service users. Each service will have a written set of group rules/guidelines (see above) and, if the guidelines are not adhered to, exclusion from a group may be necessary. However temporary or permanent exclusion is a sanction which will be used sparingly.

All Dorset Mind staff and service users have a right to be treated with respect and Dorset Mind has a zero tolerance to violence (definition below).

If it is felt by the service leader that the group rules have been breached by a service user the following procedure will apply:

- a) initially (if appropriate) the service leader will ask for an informal talk with the service user to identify the area of concern and offer to support the service user with managing the situation/their behaviour. (It may be appropriate for the service user to be asked to leave

the actual session where the breach occurred). This informal talk may be confirmed to the service user in writing for clarity.

- b) if the breach of the guidelines is more serious or minor breaches re-occur the service leader will ask the service user not to attend the next two meetings of the group as a “cooling off period”. During that time, the service leader will be available as a point of contact for the service user (in the role of service leader) and at the end of the two meeting period will arrange for an informal meeting to take place before the service user is re-admitted to the group.
- c) If a further breach of the guidelines occurs the service leader will ask the service user not to attend a further two meetings of the group as a further “cooling off period” and will confirm this to the service user in writing. During that time, the service leader will be available as a point of contact for the service user (in the role of service leader) and at the end of the two meeting period will arrange for a formal meeting to take place and for it to be documented before the service user is re-admitted to the group.
- d) If points a) (if appropriate) and b) and c) have been followed and a further breach occurs, the service leader will ask the Service Delivery Manager to consider a permanent exclusion for that service user from that group. The Service Delivery Manager will discuss this with the Chief Executive.
- e) If the above procedure has been followed and a service user wishes to appeal the decision at any point, they should access the Dorset Mind’s Complaints procedure.

Whenever a service leader is implementing stage a), b) or c) of the above process, a report of this should be made on the appropriate form.

At any point, a service user can request that someone else is present as a witness to the process.

Where a service user is violent, the service leader should not go through the process, but can exclude the service user immediately and call the police if necessary. Any incident of aggression or violence at a Dorset Mind service should be reported in accordance with the Dorset Mind Critical Incident policy.

## Operational Issues

Dorset Mind recognises that the smooth operation of its services will ensure a safe and supportive environment for its service users. Dorset Mind encourages the use of volunteers to support the service leader and actively encourages service users to volunteer if appropriate. Dorset Mind recognises that the planned absence of a service leader is inevitable and will work to accommodate this in order that a service can continue running during staff annual leave and other absence.

- a) **Promotion and Publicity:** service leaders are responsible for primary promotion of their service, whether by the production and distribution of leaflets and posters or by contacting CMHTs, Primary Care teams and General Practitioners. The format of leaflets will be determined by the Dorset Mind office to ensure consistency and compliance with national Mind branding regulations.

- b) **Volunteers:** service leaders must inform the Dorset Mind Service Delivery Manager if they are offering a volunteering opportunity as all volunteers must be centrally registered with the Dorset Mind office.
  
- c) **Service leader absence:** If a service leader is going to be absent from a planned meeting of the group they should:
  - i) discuss with the Service Delivery Manager;
  - ii) ask another member of staff if they can run the group;  
then
  - iii) cancel the meeting for that day (and notify the group members)

## Procedure Ownership

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## Approval and review status

Approved by	Signature	Date
Chris Price	<i>Chris M Price</i>	

**Consult the Chief Executive for the latest version of this procedure.**

## Document Control

### Reviewers

Name	Position
Chris Price	Chair of Trustees
Anna Windett	Trustee
Mandy Nicholson	Service Delivery Manager

## Change History

Issue	Date	Author	Reason
1.0	Dec 14	Jackie Lillywhite	New policy
1.1	Jan 15	Jackie Lillywhite	Amended
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