

## **IFSI Initiated Participant Withdrawals Level 1, 2, and 3 Training Programs**

This policy applies when a Trainer in an IFS Institute-organized Level 1, 2, or 3 training program deems it necessary to remove a participant from their training. Withdrawal is based on violations of the IFS Institute (IFSI) Code of Conduct or other policies, or due to concern for the participant's ability to take personal responsibility for their own mental health.

In case of a mental health emergency, a member of the Trainer staff calls 911 if safety issues warrant it. If the training is onsite, a member of the Trainer staff can also call the site's security or other staff.

1. The Lead Trainer and/or Assistant Trainer discuss the situation with the participant to determine if, for example, they can unblend, and to assess if it's possible for the participant to continue in the training considering the participant's and others' physical and mental safety.
2. The Lead Trainer decides whether to withdraw the participant or not, in consultation with the other Trainers and Program Assistants involved.
3. The Lead Trainer can withdraw a participant without consulting IFSI's administrative staff, though they are welcome to contact the North American Talent Manager, North American Operations Manager, Director of Operations, and/or CEO.
4. If the Lead Trainer allows the participant to continue in the training, the Lead Trainer and/or Assistant Trainer will set clear expectations and criteria for continuing with the participant, with the understanding that withdrawal is still possible. A plan to monitor the participant and their impact on others in the training should also be developed.
5. If the Participant is Withdrawn from the Training
  - A. The Lead Trainer emails the North American Operations Manager, Director of Operations, or CEO by the next business day to report the situation.
  - B. Additionally, the Lead Trainer, Assistant Trainer, and key Program Assistants involved should submit detailed written reports about what happened within one week of the participant's withdrawal.
    - i. Reports will be emailed to the North American Operations Manager, Director of Operations, or CEO.
    - ii. Reports will address who-what-when-where-why-how questions, for example, describing incidents and any actions to date in detail, including dates, listing names of training members involved, noting if outreach to other participants is recommended, etc.
    - iii. The Lead Trainer instructs the other Trainers and any Program Assistants involved to submit their reports as above.

- C. The Lead Trainer and/or IFSI administrative staff may request more information from and/or a meeting with Trainers, Program Assistants, affected participants, or others involved for clarification and to decide next steps.
- D. The CEO may bring the situation to IFSI's Executive Committee.
- E. Refunds to the Withdrawn Participant
  - i. The withdrawal/refund policy listed on the participant's training program application will be followed, and IFSI administrators may choose to refund more than the policy requires.
  - ii. For trainings with an overnighter/commuter or other site-related fees, IFSI will refund to the participant only those portions of the fees that the site refunds, minus any fees charged by the site to provide the refund.
- F. Consequences of Withdrawal for the Participant
  - i. The participant will not receive a Certificate of Completion, regardless of how much of the training they attended.
  - ii. The participant may be removed from IFSI's website Provider Directory (if they are listed).
  - iii. The participant's IFS Certification status may be reviewed and altered (if they are IFS Certified).
  - iv. The participant must wait two years from the date they were withdrawn to reapply to another IFS Institute-organized training program.
  - v. If they apply to a future training, they will be assessed by the new training's Trainers.
  - vi. Trainers and possibly the PAs of the new training will be informed of the circumstances of the applicant's prior withdrawal and may take that into account during their assessment.
- G. Notifying the Participant about Withdrawal

The North American Operations Manager or another IFSI administrator designated during the process will email the participant with information about:

- i. Certificate of Completion status (if applicable)
- ii. IFS Provider Directory status (if applicable)
- iii. IFS Certification status (if applicable)
- iv. IFSI's grievance policy
- v. The expected refund (tuition, application fee, payment plan fee, site-related fees)
- vi. The 2-year re-application waiting period
- vii. The additional assessment and information sharing during re-application
- viii. There is no guarantee of acceptance to a future training
- ix. There is no guarantee that withdrawal won't happen again if there are future infractions
- x. That others within IFS Institute may be informed about the withdrawal if the situation warrants it.

#### H. Withdrawn Participant and IFS Conferences and Webinars

- i. Others within IFS Institute may be informed about the withdrawal if the situation warrants it, for example, IFSI's Conference Manager and Online Business Manager.
- ii. This policy does not impose conditions on the participant's application to or participation in IFS Conferences or webinars, though the Conference Manager and Online Business Manager, in consultation with their managers as needed, may decide to do so.

#### I. IFS Institute Records

- i. IFSI's Admissions and Records Administrator will keep records related to a participant's withdrawal.
- ii. IFSI's administrative staff send email and other records pertaining to a participant's withdrawal to the Admissions and Records Administrator so that a record of the withdrawal can be kept.