



## Referrals and Networking Procedures

These two procedures supplement the Information, Advice AND Guidance Policy.

### Referrals Procedure

A referral happens when it becomes clear that another member of staff, another provider or another agency can offer more appropriate help or support than we can. Referrals can be made for:

- Further or specialist information, advice or guidance
- Other forms of learning
- Employment opportunities
- Work experience

and so on.

In these procedures, an external referral means referral to a person or agency outside the WEA.

### Roles and Responsibilities

Referrals may be by

1. Regional Administrative staff, where learners telephone or visit a centre
2. Tutors or tutor organisers, after discussion with a learner
3. Regional IAG and Learner Support Co-ordinators, after discussion with a learner.

There will be a national list of appropriate referrals for specialist support and progression. This will be made available on First Class/Education Zone/Learner Support/Leaflets and Resources, and will be reviewed termly by the Education Strategy Manager for Information, Advice and Guidance.

Each Region will also develop and maintain a list of appropriate local referrals that can be used for specialist support and progression purposes. To ensure that only appropriate referrals are made to professional organisations, this will be co-ordinated by the Regional IAG Co-ordinator or other designated person.

### Referral standards

- All referrals will comply with Matrix standards (upon which these standards are based)
- Anyone being referred should be told why they are being referred and given details about the referral. If the referral is to an external agency that makes a charge, or that may not be impartial in its approach, this should be explained to the person concerned
- Personal details should not be passed on to another agency without the prior permission of the person concerned.
- Personal details may be passed on *within* WEA to other WEA staff solely for the purpose of providing more appropriate information, advice and guidance for the person concerned, but this should be made clear to the person concerned.
- In the case of legal requirements for disclosure under the Rehabilitation of Offenders Act 1974 and the Data Protection Acts 1984 and 1998, these will be made clear to the person concerned.

- All referrals will be treated equally in line with the WEA Equalities and Diversity Policy.
- Referrals should only be made to agencies that are able to demonstrate (through their policies and procedures) a commitment to person-centred activity and equal opportunities.
- Referrals should be evaluated regularly and corrective action taken if the results are negative.

## **Implementing the standards**

### **Front-line office or centre-based staff**

- Front-line staff should refer someone on where another member of staff, agency or provider can help or support the person more appropriately.
- Where a referral is made, the person should be given:
  1. A clear reason for the referral
  2. Any further details, such as to whom they are being referred, what their role is, location, personal contact and (for external agencies) any costs or "hidden agendas". Details may be written down for the person if appropriate.
- It is up to the person concerned as to whether they follow up the referral.
- For external referrals, front-line staff should maintain approved referrals list(s) in each centre. These should be approved and controlled by the Regional IAG Co-ordinator (or delegated by them to an appropriate person)
- Front-line staff should not refer people to external agencies that are not on the list without consulting the IAG Co-ordinator (or delegated person).
- Front-line staff should ensure that they are familiar with the list(s) and how they might use these, seeking advice from the Regional IAG Co-ordinator (or designated person) where unclear.
- All staff should be alert for new referral points and pass this information on to the Regional IAG Co-ordinator, who will (if appropriate) add this to the approved list

### **Tutors and Organisers**

- Tutors and Organisers will be provided with a list of appropriate internal and external referrals for specialist and progression purposes through:
  1. The national referrals lists available on First Class, to which they should refer at least termly
  2. The approved regional referrals list provided by the Regional IAG Co-ordinator or equivalent member of staff
- Tutors and Organisers are expected to build up their own local list of agencies for referral. These will generally be registered or accredited organisations.
- Tutors or Organisers making a referral should record it in the ILP, and use it as evidence within the SAR process. If possible, they should follow up with the person to check whether the referral has been useful and record that, making any adjustments to local or regional lists of agencies for referrals.
- **Regional IAG Co-ordinator (or appropriate manager)**
- The Regional IAG Co-ordinator will review the regional referrals list(s) on a termly basis

- The Regional IAG Co-ordinator will ensure that any agency on the list is person-centred in its approach and has an Equal Opportunities Policy in place
- The Regional IAG Co-ordinator will update regional staff about changes to referrals lists
- The Regional IAG Co-ordinator will look at ways of measuring the success of referrals so that feedback can be given to unsatisfactory agencies or individuals, e.g. through the record in the ILP
- If referral individuals or agencies cannot offer evidence of improvement, they may be removed from the list or (if internal) disciplinary action may be taken.

## **B: Networking Procedure**

A network is a group of opportunity providers (these may be colleges, training providers, advice agencies, employment organisations, guidance practitioners, etc.) who connect with one another in order to provide a service that benefits individuals seeking support. Networks are therefore very important for making appropriate referrals. They are critical for effective outreach work because they help us identify individual and community learning and guidance needs. They often form the basis for new partnerships.

To be effective, networks need regular maintenance through meetings and other forms of contact. The information provided by networks also needs to be updated regularly, and to be checked to make sure that it is accessible to everyone who needs it. In general, it also needs to be impartial information: if it can't be impartial for some reason, this needs to be pointed out to individuals being referred to so that they can take this into account.

### **Maintaining Networks**

- The Regional IAG Co-ordinator (or delegated appropriate people) will develop and maintain networks and community links with other organisations that work with adults.
- As a guideline, Regional IAG Co-ordinators or other appropriate staff should maintain regular contact with:
  1. Their local NextSteps Partnerships
  2. Their local Learning Partnerships
  3. The Learner Support Network and associated meetings
  4. Other opportunities provided nationally, e.g. ADSET, NAEGA
- Regional IAG Co-ordinators will, wherever practicable, follow up to ensure that referrals made to network members have been effective, and give feedback to network members on this wherever possible. (See Referrals Procedures.)
- Regional IAG Co-ordinators and other staff will feed back information from network meetings to their Regions through email, First Class, tutor newsletters, training or other appropriate method.