

Workbook 2

Signposting and Referral – Information, Advice or Guidance

COMMUNICATION SKILLS

CONFIDENTIALITY

LISTENING SKILLS

RECORD-KEEPING

INTERACTION SKILLS

CODES OF PRACTICE

IMPARTIALITY

Level 2

Certificate in Information, Advice or Guidance (QCF)

Section 2: Signposting and referral in information, advice or guidance



Knowledge Activity 9: Think about how similar the process is in your organisation, describe the process and how it differs from the example on the previous page.

The difference between signposting and referral

Please read the following as it will help you to answer question 11.

Organisations offering information, advice or guidance will often need to signpost or refer clients to other agencies as they will not always be able to meet their needs.

Signposting	Referral
<p>Telling the client about information available to them and where they can go to obtain this. Examples include:</p> <ul style="list-style-type: none">● a website where information can be found● a telephone number, for example a helpline● the name and address of an organisation who can provide the required support	<p>A more formal process where a client is introduced to another organisation that will be able to help them meet their needs. This can be done by:</p> <ul style="list-style-type: none">● taking their details and passing these on to another organisation who will then contact them● making contact with another organisation for them and making an appointment● actually taking the client to the other organisation to meet with an adviser who can help

Section 2: Signposting and referral in information, advice or guidance



IAG Fact:

The following are situations in which a client should be signposted:

- the service required is not or can't be provided by the adviser as it is beyond their authorised level of competence
- specialist legal advice is required that the adviser can't provide
- another adviser is able to deal with the case more effectively
- the adviser cannot deal with the case due to their workload
- the case needs urgent action that the adviser can't provide
- the adviser thinks there might be a conflict of interest if they take the case
- the adviser decides to withdraw from a case



Knowledge Activity 10: Give an example, within your organisation, of when you would:

1) Signpost a client

2) Refer a client



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The benefits of signposting and referral

Please read the following as it will help you to answer question 12.

In order to meet the needs of a client, an organisation may have to signpost or refer them, this benefits the client by:

- Providing them with the information needed.
- Giving them access to the expert knowledge and skills from an adviser trained specifically to deal with their particular issue or problem.
- Avoiding the client having to search through vast amounts of information themselves.
- Referrals benefit the client by having an appointment made or meeting set up for them, avoiding them having to search for the right contact.
- Some clients might not have the skills or facilities to make their own appointments or find the right information, due to learning or language difficulties, disability or illness or lack of finances, housing, a telephone or computer, or transport.

The organisation signposting or referring the client will also benefit the organisation as they do not have to have specialist knowledge in all areas. Provided they have other agencies who can, this means that different organisations can specialise in different areas, making a more efficient and specialist bank of resources and information. This minimises the risk of clients being given the wrong information as clients will be referred on to the most appropriately trained or qualified adviser.

IAG Fact:

'homeless link' (www.homeless.org) are an organisation aiming to improve services for homeless people.

They work through collaboration and look for effective practice in organisations working directly with homeless people. They aim to help other organisations to be as effective as they can be. They organise visits and collaboration between organisations, provide advice and one-to-one support through nine regional offices to help organisations solve their problems, and provide the tools and information they need to improve the way they work with homeless people.



Section 2: Signposting and referral in information, advice or guidance

Knowledge Activity 11: Describe one benefit of signposting and referral for:



1) Your clients

2) Your organisation

Examples of signposting and referral

Please read the following as it will help you to answer question 13.

Think about your own organisation and when clients are signposted and/or referred. There are some examples from different settings below to help you.

Scenario	Signposting	Referral
Chelsea is 15 and has been studying a hospitality course at school, she wants to continue with this at college when she leaves school but doesn't know what she needs to do next.	Chelsea is provided with some brochures and contact telephone numbers for three colleges which she would be able to get to easily from home, it is suggested that she telephones the colleges to see what is on offer and what she needs to do next.	Each of the three colleges are contacted and an appointment is made at each college for an informal interview to assess which course would be the best for her. She is provided with the name of each person she will be seeing and appointment times.