

Referral and Signposting Policy

1. Introduction

1.1 Skills South Tyneside is committed to ensuring that all learners attain their desired learning outcomes, and understand how their learning programme will benefit them. Learners requesting or identified as requiring additional information, advice or guidance (IAG) will be provided with this by staff and tutors. Signposting and referral will take place when it becomes clear that another individual, provider or agency can offer more appropriate help or support to learner(s). Referral and signposting will take place when a learner may require:

Further or more specialised information, advice and guidance

- Other types/forms of learning
- Employment opportunities
- Work experience

Medical, social, financial or other personal needs

1.2 Skills South Tyneside defines signposting and referral as:

Internal: To another colleague in the Skills Service, South Tyneside Council or referral and signposting between staff within a provider's organisation; to the National Careers Service, Connexions Service or to any appropriate provider contracted by Skills South Tyneside to deliver IAG services.

External: To an outside organisation, individual or agency e.g. Jobcentre Plus.

1.3 Signposting and referrals within Skills South Tyneside may be carried out by staff at any level through face to face contact, via email, or by telephone.

2. Provider Roles and Responsibilities

2.1 Providers are responsible for ensuring that:

Appropriate arrangements are in place to signpost and/or refer learners to internal or external individuals, organisations or agencies as necessary.

Staff are suitably trained and competent to deliver appropriate and impartial information and advice on learning and work to learners.

Learners are given good support in accessing the information and advice needed from the appropriate individual or agency.

All signposting and referral activity is appropriately recorded and monitored.

3. General Principles



- 3.1 The provider will ensure that any Skills South Tyneside learner signposted or referred will be given clear reasons why, and full and accurate details about the individual, organisation or agency concerned.
- 3.2 A learner's personal details will not be passed on without the prior permission of the individual concerned.
- 3.3 Personal details may be shared between provider staff, the Skills Service, funding bodies and other designated stakeholders, solely for the purpose of providing more appropriate information, advice and guidance and this will be made clear to the person concerned.
- 3.4 In the case of disclosure under the Rehabilitation of Offenders Act 1974 and the Data Protection Acts 1984 and 1998, providers will ensure that these legal requirements are made clear to the individual concerned.
- 3.5 All individuals will be signposted and referred equally in line with prevailing Equality and Diversity legislation.
- 3.6 Providers will ensure that signposting and referral will only be made to agencies that can demonstrate, through their promotions, policies and procedures, a commitment to person-centred activity and equal opportunities.
- 3.7 If the signposting or referral is to an external agency that makes a charge, or that may not be impartial in its approach, the provider will ensure that the limitations of that agency will be explained to the person being referred.
- 3.8 Providers should monitor and periodically review their portfolio of signposting and referral individuals, organisations and agencies and action taken in the event of negative feedback or results.

4. When to Signpost and When to Refer

- 4.1 Whether someone is signposted or referred will depend on complex factors, including staff confidence levels and ease of access to the referral point. Providers should offer a learner both options so that they can choose for themselves.

Where providers' staff know that signposting or referral is likely to be complicated, or that it may be some time before the learner gets a response, this should be explained and further help offered.

4.2 Signposting

When a person is signposted to further help, all of the necessary details will be supplied by the provider to enable the learner to make an approach. It is then the learner's own responsibility to follow this up.

4.3 Referral

When a person is referred, providers' staff take on the additional responsibility for facilitating initial contacts between the person and the referral point. Referral describes the process of contacting an alternative agency or individual to work with the learner. This will occur when the providers' staff has reached the limit of their competence and/or confidence in a particular area of expertise, there is insufficient time to give the learner the support they need, or when a learner falls outside the provider's target client group.

5. Information Advice and Guidance (IAG)

5.1 Information

Information refers to the provision of facts and figures without discussion about the relative merits of different options. It may also involve the need to interpret, clarify or contextualise information and assess when signposting to more specialist support or guidance is needed.

5.2 Advice

Advice requires more in-depth interaction with the client. Advice involves the same support as that listed above under Information; it may also include appropriate questioning to gain an understanding of circumstances that will enable clarification and identification of need. Advice will contribute to decision making through suggestions on available options, or how to go about a course of action. It includes the explanation of information and explanations about how to access and use information.

5.3 Guidance

Guidance involves an in-depth and personalised advice and support session or series of sessions in which the advisor helps the client through the process of making decisions. It involves an interaction between advisor and client which elicits, interprets and feedbacks from both verbal and non-verbal responses and clues. Guidance involves identifying and clarifying needs, exploring ideas, and should involve challenging unrealistic expectations.

6. Marketing and Promotions

Skills South Tyneside and its subcontracted providers will ensure that all marketing and promotional materials reflect a commitment to supporting learners to access the best possible information, advice and guidance, even when this includes referral. Learning materials and a provider's website will explain to clients why and when signposting and referral might take place.

Providers are required to ensure that all of their own marketing and promotional materials, and those from other organisations/agencies made available in centres will be up to date and checked periodically to ensure that they are accurate and without bias. The range of materials on offer and available to Skills South Tyneside learners should represent an impartial IAG offer.



Where there are particular barriers in accessing services such as language difficulties, visual or hearing impairment, providers will consider what practicable additional support may be offered. This may include translated information, leaflets produced in large print, signing, minicom services etc. Additional learner support can be accessed and in some instances funded by Skills South Tyneside Additional Learner Support process.

7. Types of Support

While on programme, learners may have complex needs and multiple barriers to learning. Additional support may be needed requiring information, advice and/or guidance in the following areas:

Details of how/where to access further learning e.g. maths and English

General employment/job search

Specialist careers advice (e.g. armed forces)

Finance/hardship services

Health services, e.g. drugs and alcohol dependency, pregnancy, mental health etc

Childcare

Housing support

Libraries

Citizens' Advice Bureau

Local voluntary groups offering support to individuals with a range of support needs

Note that this list is neither exclusive nor exhaustive and may be supplemented by additional local information.

Providers are required to ensure that their front-line staff and tutors are familiar with a full range of local relevant referrals and signposting agencies.

The Skills Service, through its relationship with the National Careers Service and Connexions Service will support providers in identifying local support services.

8. Summary

Good learner support, encompassing effective and appropriate signposting and referral will help individuals to succeed and to achieve their learning and personal goals. A sound track record of learner success will place Skills South Tyneside in a stronger position when tendering for new business and additional funding. This in turn will enable Skills South Tyneside and its subcontracted providers to continue to grow and develop to support the upskilling and employability of learners within local communities.

Responsibility	Hayley Lord, Employment and Skills Manager, Economic Inclusion and Environment		
Author	Lorna Moore, Employment and Skills Officer, Economic Inclusion and Skills		
Date Issued	July 2021	Review Date	July 2022