WEA Signposting and Referral Procedures

These procedures supplement the Student Services Strategy.

Signposting and referral take place when it becomes clear that another member of staff, another provider or another agency can offer more appropriate help or support than we can. This is be undertaken with the permission of the student, to ensure we meet GPDR requirements.

Someone may be signposted or referred for:
- Further or specialist information, advice or guidance
- Other forms of learning
- Employment opportunities
- Work experience
- Support and so on.

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

1. When to signpost and when to refer

There is a distinction to be made between **signposting** and **referral**:
1. When a person is signposted to further help, they are given all the necessary details to make an approach. It is then their responsibility to follow this up.
2. When a person is referred, Association staff take on responsibility for facilitating initial contacts between the person and the referral point.

Whether someone is signposted or referred will depend on complex factors, including their confidence levels and ease of access to the referral point. It is always a good idea to offer a person both options so that they can choose for themselves. However, where staff know that signposting or referral is likely to be complicated, or that (for example) it may be some time before the person gets a response because of vacation periods, this should be explained and further help offered.

2. Roles and Responsibilities

Signposting and referrals may be by:
1. Regional Administrative staff, where students email, telephone or visit a centre
2. Tutors or course organisers, after discussion with a student
3. Learning IAG Manager, after discussion with a student
4. Head of Learner Services
5. Director for Quality and Student Services.

Volunteers also need to be made aware of this Procedure.

There is a nationally available list of appropriate referral points for specialist support and progression. This will be reviewed annually by the Learning IAG Manager

Each Region will also develop and maintain a list of appropriate local referral points that can be used for specialist support and progression purposes.

3. Standards
All signposting and referrals will comply with the **matrix** Standard (upon which these Procedures are based)
- Anyone being signposted or referred should be told why, and given details about the referral point.
- Personal details should not be passed on 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. See the Association's Confidentiality Policy and Data Protection Policy for further guidance.
- People will be signposted and referred equally in line with the WEA Equalities and Diversity Policy.
- Signposting and 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.
- If the signposting or referral is to an external agency that makes a charge, or that may not be impartial in its approach, the limitations of that agency should be explained to the person being referred
- Signposting and referral to partners should be evaluated regularly and action taken in the event of negative feedback or results.

4. Implementing the standards Front-line office or centre-based staff

Front-line staff should signpost or refer someone where another member of staff, agency or provider can help or support the person more appropriately.
Where someone is signposted or referred, the person should be given:
1. A clear reason for the signposting/referral
2. Asked permission for their contact details (e.g. name and contact details) to forwarded on
3. Any further details, such as to whom they are being signposted/referred, what their role is, location, personal contact and (for external agencies) any costs or "hidden

agendas" which may impact on their impartiality. Details may be written down for the person if appropriate.

- A person should be offered both signposting and referral and enabled to make an appropriate choice.
- If staff know that there are likely to be complications of access to the referral point, they should offer further help.
- For external signposting and referrals, front-line staff should maintain approved referrals list(s) in each centre. These should be approved and controlled by the Regional IAG Leaders (or delegated by them to an appropriate person)
- Front-line staff should not signpost or refer people to external agencies that are not on the approved list without consulting the IAG Leaders (or delegated person).
- Front-line staff should ensure that they are familiar with the referrals list(s) and how they might use these, seeking advice from the Regional IAG Leaders (or designated person) where unclear.
- All staff should be alert for new referral points and pass this information on to the Regional IAG Leader, who will (if appropriate) add this to the approved list.

5. Tutors and Organisers

Tutors and Organisers will be provided with a list of appropriate internal and external referral points for specialist and progression purposes through:

- The approved regional referrals list provided by the Regional IAG Leader or equivalent member of staff
- Tutors and Organisers are also expected to build up their own local list of agencies for signposting and referral. These will generally be registered, **matrix** accredited or partner organisations.
- Tutors or Organisers who are signposting and referring should record this in the Individual Learning Plan, to be used as evidence within the SAR process. If possible, they should follow up with the person referred to check whether the signposting or referral has been useful and feed that information back through the SAR process.

6. Regional IAG Leaders (or appropriate manager)

- The Regional IAG Co-ordinator will review the regional referrals list(s) on an annual basis, taking into account any feedback received
- Ideally, referrals will be to **matrix** accredited or otherwise meet the **matrix** Standard
- The Regional IAG Leader or equivalent member of staff will review any agency on the list to ensure it behaves fairly and responsively to students
- Unsatisfactory agencies will be removed from the list, and will be given feedback explaining why this is The Regional IAG Leader or equivalent member of staff will update regional staff about changes to referrals lists

7. The importance of networks

- 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 signposting and referral.

- 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.

- Regional IAG Leader or equivalent member of staff should maintain, as a minimum, regular contact with:
  — National Careers Service https://nationalcareers.service.gov.uk/
  — Their local Learning Partnerships
  — National networks, e.g. **matrix,** NAEGA, NIACE,
  — Regional IAG Leader or equivalent member of staff will feed back information from network meetings or Newsletters to their Regions through email, tutor newsletters, training or other appropriate method.

7. Links to other policies and documents

This policy is part of a suite of Student Support policies defining student support entitlements. Most relevant policies are publicly available through the WEA's website at https://www.wea.org.uk/about-us/policies

Date of this Review	Date of next Review	Policy reviewed and updated by:	Policy approved by:
July 2021	July 2022	Learning IAG Manager	Director of Quality and Student Services