Signposting and Referral Procedure

Scope

This procedure supplements Portland Training's Information, Advice and Guidance policy. It covers all individuals and organisations that may come into contact with Portland Training from time to time, including employers, learners, funders, awarding bodies and staff.

The Signposting or Referral could be for:
- Further or specialist Information, Advice or Guidance
- Other forms of learning
- Employment opportunities
- Work experience
- Specialist support services

When to Signpost and when to Refer

Signposting is when a person requires further Information, Advice or Guidance on a subject and Portland staff will provide the necessary contact details for them to make an approach. It is then the individual's responsibility to follow that up and make an approach.

Referral is when a person/organisation is referred to another contact and Portland staff will take the responsibility for facilitating initial contacts between the person and the referral point.

The decision on Signposting and Referral will depend on many factors, including the individual's confidence to make an approach, the seriousness of the situation, or timescales. Portland Training staff will discuss all options with the individual/organisation prior to confirmation on the course of action.

Portland aim to support all clients wherever possible, however it is acknowledged that there may be times when Signposting or Referral needs to take place. This will happen when it becomes clear that another member of staff, another provider or another agency can offer more appropriate help or support than we/you can.

Roles and Responsibilities

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All staff have a duty and responsibility to Signpost and Refer clients. Examples of this may be:

- Business Development Staff – Signposting to another provider where Portland Page 1 of 3 Signposting and Referral Procedure cannot support an enquirers training and development needs
- Tutors/Assessors – Referring learners to other staff within Portland Training, or to external support mechanisms
- Business Administrators – Referring enquirers to the appropriate member of staff who can provide support.

Standards and Protocols to be followed

✓ All signposting and referrals will comply with Matrix standards

✓ All individuals and organisations signposted or referred should understand why they are being referred, and provided with up-to-date accurate information which should be regularly validated

✓ Details of individuals will only be passed on with prior permission of the individual (GDPR 2018). In line with DPA personal details will only be accessible within Portland to authorised staff who need to know

✓ Signposting and Referrals will be non-discriminatory, and a fair and equitable approach will be adopted by Portland Training, taking account of the Equality and Diversity Policy within Portland

✓ Signposting and Referrals will only be made to reputable agencies and organisations that can demonstrate a commitment to quality, and an understanding of the concepts of IAG

✓ Clear records should be maintained by individuals within Portland of any referrals that they have made to external organisations, and also to internal colleagues

Implementing the Standards in Practice

Management will evaluate the Signposting and Referral system annually to identify any gaps in provision or opportunities for product development within Portland, ensuring there is no duplication of services.

Management will evaluate the effectiveness of the Signposting and Referral procedures, following up on a % of referrals to ensure outcomes have been met. The results of this will link to Portland's base data on reputable agencies and organisations for referral.

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All staff within Portland will know and understand the Signposting and Referral process, and will contribute to maintaining an effective record of reputable agencies and organisations that can be used.