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**“Working to Empower the Community”
in Lancashire and Cumbria**

Pamela Beswick - Chief Executive Officer

Community
Legal Service



Help Point

Signposts Information and Advice Policy

Introduction

1. The purpose of this document is to ensure that everyone using the Signposts Project has a clear understanding of the nature of the services offered in regard to information and advice.
- 1.2 It is hoped that it will clarify the position for users of the service, staff, volunteers and, where appropriate, workers from other organisations. Above all, Signposts seeks to ensure that enquirers can access its services and receive a satisfactory response to any enquiry made, We need to be clear about the Minimum and Maximum standards of information provided.
- 1.3 This policy is in line with Signposts' other basic principles of Equal Opportunities, Empowerment and Staff Development, for further details about these please refer to the Chief Executive or the Induction Pack for the relevant documents.
- 1.4 In reading this policy document, you should refer to Signposts' Confidentiality Policy (with Child and Vulnerable Adult Protection), which sets out clearly the structure within which Information and Advice is provided.

Signposts consists of a team of paid staff, and volunteers. The staff list can be found on the Signposts website www.signposts.org.uk

There are also substantive workers from other agencies who are not regarded as part of the team.

- 1.5 Through its role as an Information and Advice service, Signposts must:-
 - Ensure that no information provided is more than a year old (dated on arrival)
 - Ensure that information provided by members of the Signposts team is monitored through supervision sessions.
 - Provide relevant and correct information that is accessible to all members of society.
 - Ensure that the necessary training opportunities are made available to the team, at an appropriate level.

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Member of AdviceUK (previously FIAC)

Company Limited by Guarantee: 5990592
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North Lancashire
Teaching Primary Care Trust



INVESTOR IN PEOPLE

Additional major funding from Preston City Council, the FC Scott Charitable Trust and Tudor Trust

- Ensure that the necessary resources are available to achieve the provision of the service that it offers.
- Ensure that constant evaluation and monitoring takes place to ensure that the above are achieved and that specific organisations are targeted to meet any needs which become obvious i.e. Benefit Agency assessments of entitlement.

Level of Information and Advice

2.1 The following levels of information exist within the service that Signposts provides, and the Chief Executive is responsible for ensuring that the staff team are clear about what roles they are expected to take through the training and supervision process.

Information Giving

2.2 This is where a question asked by an enquirer can be dealt with by a straight piece of information giving and will include Signposting i.e. "Can you tell me when the C.A.B. is open and where it has moved to?"

For this purpose Signposts strives to collect, display and develop national, regional and local information. Where this information has been collated and produced by Signposts it will include a statement that what Signposts provides it for reference only.

Advice Giving

2.3 Where the range of information available can be presented to an enquirer to provide a range of options and/or ideas and their consequences. These can then lead to the individual making a decision which may change or enable them to cope with a practical situation. It recognises that the choices offered are limited by knowledge and availability of information sources, but seeks to avoid bias.

Advice giving is not about a worker using their own values and judgements or giving their own opinion to an enquirer i.e. "Well if I was you, I would....."

Advocacy within the building

2.4 This involves a worker supporting an enquirer through any negotiations with other organisations or individuals. The worker needs to be aware of how easy it is to disempower an individual in this situation and must not take over any negotiation, checking out any details or options with the person that they are being an advocate for. Wherever possible the advocate should support the enquirer to make contact/enquiry themselves even to the point of role playing a situation.

Counselling

2.5 The British Association for Counselling defines counselling as;

"An explicit agreement between counsellor and an individual with the aim of providing to explore, discover and clarify ways of living more resourcefully and towards greater well-being".

Counselling is about enabling individuals to come to terms with their lives, reach a growing understanding of themselves, make decisions, set realistic goals and take any relevant action.

Counselling is not about trying to influence, persuade or argue with an individual.

Workers must be clear where general conversations and support of an enquirer begins and ends and where counselling is needed.

Any counselling must be through a worker trained in this area who has been identified and cleared to do such work by the Chief Executive of Signposts.

2.5 Referrals and Signposting

Making referrals at Signposts can occur in two different ways.

- **Signposting:** information about another organisation is given to client who then independently follows up the contact.
- **Referral:** where a specific process/form needs completing in order for the client to access another service.

In all cases of signposting and referring, we select organisations determined by their own areas of service delivery, processes and criteria – using this we will pick the most appropriate organisation to meet the clients' needs. Priority will be given to organisations/services with a quality mark, unless no other agency suitable has a quality mark.

Although unlikely, if there is a cost implication with regard to a service the client will be informed of this.

It is important for Signposts to examine at what point a referral is made and whether this is made too soon in an enquiry, or too late. This may be by setting up a meeting with the referral agency at Signposts because the individual is more comfortable in the surroundings or the referral agency is already using the building to meet its own referrals. Alternatively, it may be by making an appointment for the enquirer to visit referral agency directly. Appendix F identifies the processes which should be carried when making a referral to another agency organisation.

In all cases members of the Signposts team should discuss with their line manager before embarking on any referral or signposting process

If there is any doubt about whether referral in either of these ways should be made the worker should refer to the Chief Executive for advice. Together those involved can look at how to access a more specialised service from another organisation.

Please note that due to the Citizens Advice Bureau confidentiality policy, enquirers must self refer. When making a CVS referral the appropriate 'active signposting' referral form must be used.

Paragraphs 2.7 Social Policy and 2.8 Direct Service Delivery have been deleted.

2.6 Central Record of Referrals

Signposts will keep a central record of referrals made to other agencies via the monitoring and recording systems used. Process for monitoring referrals is in Appendix F.

Where no service is available this should be monitored within the 'actions taken' section of the monitoring files and case work database. This information will be used to identify gaps in services.

2.7 Feedback from referrals

Any feedback relating to organisations or agencies referred to by Signposts team should be feedback to the line manager and then to the Strategic Management Team (SMT).

Where the SMT consider the feedback (positive or negative) to be relevant to pass on to the organisation or agency concerned, this will be fed back to the appropriate manager of that service.

Should the feedback be related to Safeguarding the Signposts 'Whistle Blowing' and 'Confidentiality' policies will be implemented.

Training and Supervision

- 3.1 Signposts acknowledges that Information and Advice work requires special training, including: communication and listening skills: information retrieval skills: basic administration skills/time for this: and structured and unstructured time to do the above.
- 3.2 The basic induction process by which a person wishing to work at Signposts will go through can be seen at Appendix A in line with the projects' Staff Development Policy and the NACVS Charter.
- 3.3 Discussion about information given will be an integral part of the supervision of workers at Signposts.

Monitoring

- 4.1 The monitoring of enquiries at Signposts exists for the following purposes:
 - a. To ensure that the information and advice provided by Signposts is correct and unbiased.
 - b. To assess the needs of the local community and to attempt to develop services for the benefit of that community.
 - c. To assist in the application for grants and funding
 - d. To be accountable to the local community and funding bodies.
 - e. to influence social policy
- 4.2 The monitoring of enquires is covered by Signposts Confidentially (including Child and Vulnerable Adult Protection) Policy.
- 4.3 The monitoring of enquires enables Signposts to set short medium and long term targets by assessing any gaps in the service provided.

Access to Information

- 5.1 Signposts is committed to providing relevant local information and undertakes to collect, update and produce such information.
- 5.2 In doing this, Signposts is committed to produce accessible, attractive, relevant, and easy to read information, within an equal opportunities framework.
- 5.3 The overall atmosphere at Signposts will not be affected by the provision of this static information i.e. leaflets displays will be discreet and not detract volunteers from meeting and talking with users of the project.
- 5.4 Part of Signposts' role as an Information and Advice service is to promote easy access to information by all members of society.
- 5.5 Staff are kept up to date of new developments within law and social policy via:
 - Monthly team bulletins
 - Email groups

Chief Executive Officer
October 2009

Implications of Offering an Information and Advice Service

Staff Needs

Special Training

Information retrieval skills

Time (Structured and unstructured)

Administration skills and time

Support and supervision

Practical Needs

Resources (books, leaflets, telephones)

Appropriate space including: space for enquirer to wait while you find out

Offer and publicise confidentiality

Up-to-date and logical systems

Childcare

Practice

Listen to users

Workable policies

Support and supervision

Constant evaluation

Constant modification (where necessary)

Accessibility

Effective

Training Programme

Initial Enquiry from Volunteer

Application by Volunteer

Interview with relevant manager (criteria to be met)

Confidentiality Policy Understood

Induction

Shadowing A Worker

Training (ongoing)

Initial Enquiries and monitoring of information provided

Supervision, Team Meetings and Events

Information Giving Setting

Welcome

Enquiry

Issue

Appropriate level of Information/Advice

Agencies/Organisations

Ensure a return visit if enquiry not satisfied

Within overall atmosphere of
accessible and friendliness
Implications for Signposts' practice
and social policy change

Confidentiality

Checklist for Workers

- Remember Signposts' Confidentiality Policy and refer to Do's and Don'ts document at Appendix E.
- What is the enquiry?
- What does the person want me to do?
- What is the issue and what needs resolving?
- Is there anything that needs dealing with urgently, if the enquiry can be dealt with within the weekly timetable, can the person afford to wait?
- Is the issue presented the real issue and do I need to go into any further detail?
- What other information do I need and how am I going to ask for it?
- Am I the right person to deal with the enquiry? (Remember the Confidentiality Policy)
- Do I need to ask permission to contact somebody else?
- What are the options and consequences for the person?
- What are the personal/professional/legal implications for me?
- Do I need to take notes? And what is going to happen to them?
- What next: What level of information/Advice? (see 2.1.-2.9)
- How do I know that the information that I'm giving is correct? Check date stamp of library copy of leaflet or form. If you check with an organisation that the information is up to date, and it is re date stamped. If it is not get up to date information sent. Also check with the organisation that Signposts is still on their mailing list.
- Do I need to tell anybody else?
- Have I found out information that needs to be circulated to other members of the staff team through the message book or a staff meeting.

INFORMATION GIVING – QUICK REFERENCE DOS AND DON'TS

All workers at Signposts need to be aware of certain basic principles that underpin the work here. These are designed to protect both staff and enquirers and to enable a consistent approach to be made.

Do

- Make people feel welcome and give people time to relax
- Remember to work within Signposts Confidentiality Policy including making the interview process private by using the back rooms or other private space
- Challenge information that people are giving – ask gentle questions to check factual information – use reflecting-back techniques
- Allow sufficient time to address actual issues rather than initial presenting problems – often people will ask a question to check out the service and then ask a more pressing one
- Ask for help if there is anything you do not know. Do not be tempted to give quick answers that may not be correct. Give yourself time to research issues – ask the enquirer to call back so that you can do this.
- Remember that there are few emergencies – most things can wait a little while. Do acknowledge the enquirer anxiety but do not collude or exacerbate a situation by reacting in a panic led way yourself.
- Do check with the Chief Executive or Information & Advice Worker if you are unsure how far to go with an enquiry.

DO NOT

- Give anyone money or gifts in kind i.e. cigarettes, cosmetics – hot or cold drinks is fine
- Give staff telephone numbers or addresses to anyone – always place the onus on the member of staff to contact the person enquiring – i.e. say you will pass the request on to them.
- Handle any clients' money or do any financial transactions for them.
- Administer, or take responsibility for, medication.
- Give anyone lifts in your car. You are not covered by Signposts outside the building when giving information and advice. Also there is the question of motor insurance and petrol costs.
- Do not recommend an individual to anyone - do not make value judgements i.e. oh yes he or she will be fine.
- Do not contact another agency on behalf of an enquirer without their permission

Some of you may find these issues difficult particularly where it would seem to restrict help that we offer. However when considering the don'ts please remember that we are offering a service to the community and that an individual must be seen in the context of the community i.e. it may be ok to give 50p to someone but what about the next person who asks, and the next, and the next.

Information and Advice Appendix F

Referrals to other agencies – Processes and Procedures

We are regularly signposting and referring our clients to other agencies and this is part of our partnership work, where we identify when our service is unable to provide the specialist support needed.

- **Signposting:** information about another organisation is given to client who then independently follows up the contact.
- **Referral:** where a specific process/form needs completing in order for the client to access another service.

In all cases of signposting and referring, we select organisations determined by their own areas of service delivery, processes and criteria – using this we will pick the most appropriate organisation to meet the clients' needs. Priority will be given to organisations/services with a quality mark, unless no other suitable agency has a quality mark.

Although unlikely, if there is a cost implication with regard to a service the client will be informed of this.

In order to ensure that referrals are appropriate the following process should be followed:

Information and Advice/one-off contact including:

- **enquiries at Community Centres**
- **outreach information and advice**
- **Detached outreach work (young people)**
 1. All referrals to be completed with the client.
 2. Strategic worker on duty (the weekly location sheet will tell you who this is each day) or Project Lead, agrees the referral and where possible countersigns referral form.
 3. Copies of forms to be given to client.
 4. The referral should be monitored within the monitoring file under 'Networking and Referrals'.

Group work including:

- **Groups attending Community Centres**
- **Signposts own groups (Young Carers; Youth Café; Women's Group; Older People's Forums etc)**
- **One off events (Family Days; Play Schemes; trips out; FRHP activities)**
- **Travelling Tots sessions**
 1. All referrals to be completed with the client.
 2. Referrals should be discussed and agreed with Project Lead who, where possible will countersign referral form
 3. Copies of forms to be given to client.
 4. The referral should be monitored within the monitoring file under 'Networking and Referrals'.

Case work including:

- **Adult case work via Help Direct; Lancaster City Council Homeless Prevention; Lloyds TSB Entrenched Homelessness; Community Centres**

- **Young People's work**

- **Family Support**

1. All referrals to be completed with the client.
2. Referrals should be discussed and agreed with Project Lead and where possible, will countersign referral form.
3. Copies of forms to be given to client.
4. All actions recorded on client database record.

Central Record of Referrals

Signposts will keep a central record of referrals made to other agencies via the monitoring and recording systems used.

One-off information and advice enquiries will be monitored via the monitoring sheets under topic area 'Networking and Referrals'. Case work referrals will be monitored via the case work database under 'Networking and Referrals'.

In all cases each individual referral should be monitored separately, even if related to an enquiry.

Where no service is available this should be monitored within the 'actions taken' section of the monitoring files and case work database. This information will be used to identify gaps in services.

Feedback from referrals

Any feedback relating to organisations or agencies referred to by Signposts team should be feedback to the line manager and then to the Strategic Management Team (SMT).

Where the SMT consider the feedback (positive or negative) to be relevant to pass on to the organisation or agency concerned, this will be fed back to the appropriate manager of that service.

Should the feedback be related to Safeguarding the Signposts 'Whistle Blowing' and 'Confidentiality' policies will be implemented.

Chief Executive

Updated August 2009

(Revised following CLS Review October 09)