

Linking to other services:

Referral Guidelines for Family Relationship Centres and the Family Relationship Advice Line

Family Relationship Centres and the Family Relationship Advice Line are front doors to services that can assist families at all stages of their relationships. They help families with relationship issues by providing appropriate information and referral, and also help separating families to achieve workable parenting arrangements (outside the court system) through information, support, referral, advice and, in the case of Centres, provision of dispute resolution services. In doing this they are required to deliver high-quality, timely, safe and ethical services.

Effective referral practices are therefore critical to the operations of Centres and the Advice Line.

The following guidelines are provided to assist Centres and the Advice Line to develop the best possible referral practices. The guidelines are built on research conducted for the Attorney-General's Department by the Institute of Child Protection Studies on screening and assessment, as well as a series of referral workshops conducted by the Department in May 2006.

The relationship with the client

Note: 'Client' in this context includes telephone callers

Effective referral starts with the skills and attitudes of staff, including empathy and respect for the client, a non-judgemental attitude and sensitivity to cultural needs.

Staff should acknowledge and address the client's most pressing needs and concerns and explain the reasons why a particular referral has been made. Safety issues need to be identified and addressed and referrals should not compromise client safety.

Staff should avoid a 'processing' attitude in which the referral is seen as merely directing people through an impersonal system. First impressions matter in this regard, especially the manner of Information Officers and other first point of contact staff.

Distressed clients

Referral needs to take account the level of distress experienced by the client. For example, it may be necessary to settle distressed clients before referring them on to other services. Information Officers on the Advice Line should always try and transfer distressed callers to a Parenting Adviser.

Client choice

Where more than one service may assist clients, it is appropriate to provide them with information about the range of services available and to let them make up their own minds about which particular service or services they want to use. In doing so, staff may need to provide some guidance on any special conditions for using a service. For example, many services would not be available to low income or special needs clients. It is important to refer clients to the most appropriate service at the right time and avoid a 'merry-go-round' of referrals.

Barriers to other services

Staff in the Centres and the Advice Line need to be aware of possible barriers that a client may experience in using another service and, where feasible and appropriate, work with the client to find ways to overcome these barriers. Barriers may include:

- lack of information about services and what is available
- lack of client capacity or interest in taking up the referral
- waiting lists that are too long to meet the client's needs
- cost
- lack of child care
- cultural or language barriers
- difficulties in contacting clients (eg lack of phone services)
- family ties
- lack of anonymity issues in small communities
- lack of interpreters
- lack of services particularly in rural and regional areas
- lack of transport options particularly for disabled or aged clients.

Developing relationships with the community and other services

Family Relationship Advice Line

The Advice Line is a national service and staff at a call centre in one State will frequently have to make referrals to local services in another State or Territory. The Attorney-General's Department, together with the Advice Line management team, has developed and will maintain relationships with certain key national services such as the Child Support Agency, Centrelink, the family courts and key state government agencies. In relation to local services, the Advice Line will depend upon the information about services that is registered on Family Relationships Online (using the Resource Manager) which is accessible through the Advice Line Call Management System. It is crucial that the information registered on Family Relationships Online is comprehensive and up to date.

Family Relationship Centres

As outlined in the Operational Framework, Centres are required to engage with a wide range of community groups and services and to build collaborative relationships with these groups and services. Such relationships underpin effective referral practices.

Centres need to network with their communities through such activities as conferences, workshops or regular meetings, information sessions and visits to other agencies. It may also be useful to have one worker to act as point of contact with each referral agency.

Common intake and screening processes could be developed in conjunction with other services as a way to facilitate referrals.

It is also desirable for Centres to establish reference groups to guide them in their local referral practices. Centres should also involve Indigenous and culturally and

linguistically diverse communities in the development of referral practices. Connections with specific communities (including elders in the community) will help Centres gain awareness of local community issues. It may be that action research reference groups established by Centres will also be an appropriate forum for discussing referral issues.

Centres need to be conscious about the needs and concerns of other services and attempt to deal with these concerns in their referral practices. For example, other services may be worried about not being able to cope with the volume or type of referrals being made by Centres, or may fear that the Centre will make inappropriate referrals.

It is useful for Centres to develop clear protocols between themselves and other service providers. These could take the form of memoranda of agreement or other forms of formal agreement, which in outline relationships and delineate the roles and responsibilities of collaborating agencies. Agreements should be reviewed periodically and modified as appropriate. When confidential information is shared between coordinating providers, such formal agreements are essential.

Accurate information

Staff in the Centres and Advice line responsible for making referrals must have an accurate knowledge of the services provided by other agencies which are available to meet client needs.

Family Relationships Online is the key resource for this purpose. Family Relationships Online has been developed as a service finder for the whole of the family relationships services sector. The information that can be registered on Family Relationships Online is comprehensive and that information can be updated at any time directly by service providers. It will be continuously improved as feedback is obtained from the sector.

Family Relationship Centres have an important role in nominating for registration on Family Relationships Online local non government funded service providers to which the Centre itself refers. This expands the range of appropriate local services to which the Advice Line may also refer. Centres should also ensure that information about their own services is registered on Family Relationships Online and is regularly updated.

The following information can be registered on Family Relationships Online:

- name of the provider
- contact name and telephone and fax numbers, and e-mail address/s of the provider
- the title of each service provided
- the service type of each service provided (eg. Children's Contact Service)
- standardised search keywords for each service provided
- target audience for each service
- language/s a service is provided in
- name of outlet through which each service is provided

- physical and postal address of each outlet through which each service is provided
- coverage area(s) for each service or outlet
- opening hours of the outlets through which each service is provided
- directions, transport information, and accessibility to public transport
- how the service may benefit the client
- waiting times
- limitations and barriers (for example, whether conflict checks are undertaken in relation to legal referrals, see separate document on legal referral)
- eligibility criteria
- admission and referral policies and procedures
- costs/fees and acceptable methods of payment
- competence in providing services appropriate to the client's culture, language, sex, sexual orientation, age, and developmental level, including profiles on strengths and specialist areas.

Referral processes

The choice of referral process depends on the client's needs, what arrangements if any have been agreed with the service to which the client is to be referred and the capacity of both the referring organisation and the service to which the client is being referred at any particular point in time.

Referral processes can take many forms. The table below outlines examples of referral processes and the advantage and disadvantages of each. Referral processes can occur in a telephone environment, in face to face settings or in the form of written communication (including e-mail) or a combination of these channels. A referral process selected may combine aspect of each of these processes. For example, referrals may be active and warm or facilitated and cold.

For the reasons outlined in the table, Centres and Parenting and Legal Advisers on the Advice Line are encouraged to use facilitated, warm and/or active referral processes where feasible, especially for clients who are likely to have trouble using other services without assistance.

Feedback and follow up

When a referral is made, it is useful to obtain client feedback about the referral. A follow up call may be needed to ensure the referral was effective. In relation to Centres, it may be possible to set up feedback processes that take the form of a three-way discussion between the Centre, the service to which the client is referred, and the client.

Possible term	Characteristics	Possible advantages and disadvantages
Passive referral	The client is given contact information for appropriate service(s) and is left to make her/his own contact at a time that best suits the client.	This process gives responsibility to the client to take action on their own behalf. However, there is a greater likelihood that the referral will not be taken up.
Facilitated referral	The client is helped to access the other service, for example, the referring organisation makes an appointment with the other service on the client's behalf, asks the other service to make contact with the client/s or a caller is transferred to the other service.	The other service is made aware of the client, and the client is helped to access that other service. The client may need to wait for a response to the other service.
Active referral	The referring organisation, with the client's consent, provides the organisation to which it is referring the client with information that it has collected about the client or with its professional assessment of the client's needs.	The client does not need to repeat all of their story and the agency to which the client is referred has relevant information about the client. However, there is a risk that the information is communicated out of context and therefore misinterpreted by the service which is receiving the referral, especially if not done as a 'warm' referral (see below).
Cold referral	The client is transferred to another service, without any immediate communication between the Centre or Advice Line and the other services, for example, by putting the client into a call centre queue.	The other service may be unaware of the nature of the call or of any information or services that have already been provided. The client may be frustrated that they have to re-tell their story or may not communicate their needs in a way that allows the other service to see why the client has been referred.
Warm referral	A 'live' three way conversation in the presence of the client (whether face to face or by telephone) in which the referring organisation introduces the client, explains what has already been done to assist the client and why the client is being referred.	This provides an open and transparent process in which information can be exchanged between the Centre, the client and the other service. Issues can be clarified immediately. The client does not need to repeat all of their story. The process relies on someone being available at the other service at the time the client is to be referred.

Staff skills

Sound skills and practices are critical to effective referral. Centre staff who make referrals must also possess the knowledge and skills needed to support people in accessing other services if required, including negotiating ways to overcome barriers to access to services.

The following checklist may assist staff in Centres and the Advice Line to make effective referrals:

- I understand the client's situation and perceived needs.
- The client and I have talked about how to prioritise these needs and what options exist to help address them.
- The client is willing and ready to be referred.
- We have discussed what issues might make it difficult for the client to follow through with the referral.
- The agency to which I am referring the individual is registered on Family Relationships Online or I am familiar with the agency, including its eligibility requirements and services.

Some additional points for Centre staff and for Parenting and Legal Advisers on the Advice Line are:

- I have considered whether a facilitated, warm or active referral would be desirable, based on the client's:
 - ability to negotiate complex social situations
 - ability to provide and receive information
 - ability to tolerate waiting
 - level of ambivalence about seeking help
 - interpersonal style (eg passive or argumentative)
- If the referral is a passive or cold referral, I have provided sufficient information and 'coaching' to help make the referral successful.
- (Where appropriate) I have made a plan to follow up with the client to see how things went and to determine next steps.