

Supporting Effective Referrals: A Forum for Managers & Supervisors

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INFORMATION AND REFERRAL TRAINING



Toronto West
Local Immigration Partnership
Community Collaboration at Work

*f*indhelp



Can you address the million dollar question? 😊

“How can agencies in Toronto support the development of staff knowledge and capacity in a context of limited time & resources?”

Challenges:

- ✓ Logistics
- ✓ Funding/Lack of Available Resources
- ✓ Knowing Staff Training and Development Needs
- ✓ Transfer of knowledge into action

A Quick Anonymous Poll

Do you provide:

- ✓ information & referral training to your staff as part of their orientation?
- ✓ training on conducting effective assessments?
- ✓ training on providing quality referrals?
- ✓ training on information retrieval/resource database?

External Training Resources

- ✓ OCASI Learn at Work <http://learnatwork.ca/>
- ✓ [#CDNIMM Events](#) – Settlement Wiki
- ✓ Local Immigration Partnerships/Networking
- ✓ BLISON Project (more from Trudy later!)
- ✓ AIRS Online Training Courses
- ✓ Findhelp Information Services

Organizational Standards Initiative (OSI)

The OSI focuses on capacity development, standardization and professionalization of settlement agencies.

The standards that the OSI has developed are divided into four main categories:

- A Community-Based Approach
- Governance and Strategic Leadership
- Operations
- Human Resources

<http://www.orgwise.ca/>



What should we be Training on?

- **Knowledge** - Information or facts needed by the Settlement Worker.
- **Skills** - Abilities or performance competencies needed by the Settlement Worker.
- **Attitudes and Work-Related Behaviours** - Feelings or viewpoints needed by the Settlement Worker.

Training In Information & Referral

Training should address:

- ✓ Making Connections/Building Trust and Rapport
- ✓ Active Listening Techniques
- ✓ Assessment Skills
- ✓ Referral Provision
- ✓ Identification of Resources
- ✓ Advocacy and Follow-up Procedures
- ✓ Social and Human Services Delivery System

Three Types of Training

- ✓ **Pre-service training** appropriate to the knowledge and skills of new staff to ensure that they meet organizational expectations.
- ✓ **On-the-job training** that involves increasing levels of responsibility in handling inquiries.
- ✓ **In-service training** that focuses on refining and updating the staff's information and referral skills.

Before Making a Referral

The two critical parts of referral provision are:

- 1) Identifying organizations and programs capable of meeting the client's assessed needs.
- 2) Providing enough information about each organization to help a client make an informed choice (and sometimes helping clients for whom services are unavailable to identify or explore alternative solutions).

Before Making a Referral

- ✓ Ensure the client is eligible for the service to which you are referring.
- ✓ Don't make referrals for the sake of making referrals.
- ✓ Don't make promises you can't deliver.
- ✓ If it is a referral out of the database, say so. (Cite the source)
- ✓ If you are providing referrals, you need to make clear that you are providing referrals, not ***recommendations, endorsements, or guarantees of service.***

Thank you for attending this session!

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