Insights and Learning Session

Using signposting and referral systems to understand and support the user journey (video **here**)

1. Welcome and introductions

MdlR welcomed attendees who introduced themselves and their interests via the chat function.

Mandy Rollins from Disability Solutions West Midlands - mrollins@disability-solutions.net 01782 667326 / 07454 320950
Cayce Ibbotson - glad to be here. I am a voluntary caseworker at CASCAIDr providing specialist legal advice in the Adult social care sector. I welcome contact from anyone interested in increasing access to justice in the Adult social care sector, or the development and use of AI and blockchain in that sector. Keep up the dedicated work all! cayce@cascaidr.org.uk
I am Sue McCarro - Manager of Advice and casework at Wirral CA, we are looking for extra advice support for clients - e.g., a pro bono app for Housing
I'm Dan Sutch from www.wearecast.org.uk a charity supporting other charities/social impact orgs to figure out how to use digital, data and design
I'm Amit Kohli, Head of Data Insights @ Access Social Care. Interested in democratising access to justice & care. I'd like to mention our chatbot: https://www.accesscharity.org.uk/chatbot. It delivers validated bespoke legal information, at scale! Try it yourself by clicking on the icon bottom right.
I am Christina Photiou - Referrals and Care Plan Coordinator at the Helen Bamber Foundation. We work holistically with asylum seekers and refugees providing therapy, social and practical support in London.
I'm Laura Carter, senior researcher at the Ada Lovelace Institute, where we're starting to research ways that data and AI can be useful (and where they are not useful) in individuals' journeys to access justice. lcarter@adalovelaceinstitute.org
Dal Warburton from AdviceUK dal.warburton@adviceuk.org.uk - we are learning with members about how to improve the journeys people take when they are looking for advice and support.
I'm Sophie Vaughan, the referral coordinator at the North Wales Law Centre Steering Group, we are currently in the ealry stages of offering housing servces to clients across North Wales.
My name is Elena Chiviyska. I am the Health and Wellbeing Worker at Europia, a charity that supports Central and Eastern European nationals living in Manchester and Greater Manchester.
I'm Katherine Tanko, Director of North Bristol Advice Centre.
I'm Laura Holland, Senior Solicitor at North Yorkshire Citizens Advice and Law Centre. We have LAA contracts in Housing and Immigration and Asylum, and Access to Justice Foundation funding in those areas plus family and discrimination.
My name is Carolina Albuerne and I am now working freelance after having managed the Good Practice work at Refugee Action and leading on the Access to Justice Work. Very interested to continue in this line of work and understand the use of referral and signposting. carolina.albuerne@me.com
I'm Jude Hawes - Head of Specialist & Equalities Serv ices at CA Staffordshire North & Stoke
I am Samson Rattigan - Head of Services at Friends Families and Travellers. My main interest is around 'successful' referrals and signposting - we are reluctant to refer or signpost our service users to other orgs because the majority of the time we do - there is a breakdown in communication or the

org doesn't understand our clients culture and often the client will come back to us with the unresolved issues in further crisis
I'm Becki Cassia from transparently. We are a member of the Law Society's Legal Tech Incubator and have developed legal service delivery platform for family law, which is currently being piloted by law firms. We enable clients to work with legal professionals under different representation models including unbundled (ad-hoc). My email is becki@transparently.co.uk
My name is Dr Liz Curran I am an evaluator and researcher. I am Associate Professor of Clinical Legal Ed and School Research Impact Lead at Nottingham Law School, NTU. I work on access to justice and current research involves research and examination of impactful service delivery that supports poor and people with multiple disadvantages to have improved justice and health and social outcomes and feel legally empowered to participate in civil society and decisions about them (voice). https://www.ntu.ac.uk/staff-profiles/law/liz-curran
I'm Wendy Eades, Research & Evaluation Officer from Law for Life, which provides Advicenow, a website that offers free access to guides on legal issues, for anyone who can't see an adviser or afford a solicitor. We also provide links to other trusted organisations online where we can't help directly, and work with other organisations on specific projects, e.g., we provide the Affordable Advice service with Resolution lawyers. www.advicenow.org.uk wendy.eades@lawforlife.org.uk
Julie Ehlen here from Equality and Employment Law Centre based in Liverpool. We are in a unique position in that we are provider of free legal advice in employment and discrimination across England and Wales. We are a member of Liverpool Access to Advice Network and part Refernet. We use this an important tool to signpost clients to free Legal Aid which is not widely promoted. We have also enhanced our network with other advice providers in the Liverpool City Region. We have had clients access Legal Aid through referent something they didn't know existed. Civil Legal aid remote telephone service is the best kept secret however we are working hard to promote this service and referent has enabled us to do this.
I'm Rhoda Cooke, newly appointed Operations Manager for service Impact and Improvement at CA Somerset.
Paul Massey- My legaltech platform is working on an Innovate UK funded A2J app with Northumbria University law clinic for litigants in person to understand and manage their disputes through guided decision-trees. This will include a referral network, so this is all very helpful learning. The App is not restricted to 1 particular advice area but has some initial focus for LIP chatbot/decision-tree based guidance. Very happy to discuss this app and potential to join the referral network and to get people's feedback on what is needed in terms of initial digital guidance and triage for LIPs. paul@tabled.io thanks!

2. An overview of signposting and referral systems

MdlR gave an overview to the session as an opportunity to explore the opportunities and challenges that implementing signposting and referral systems can offer our services, and our users, as well as looking at what additional insight these systems can generate on the user journey and experience.

We know that our users usually experience more than one issue and often access our services at a time of extreme distress. We can't always offer all the services our users need, so signposting and referrals can offer the most holistic solution reducing the burden on the user to triage and access other services.

In addition to this, we all want to conserve our limited resources and capacity to ensure we deploy and utilise services at the most impactful point of a user journey, but when supporting users with complex lives and issues, and operating in sometimes complex local support ecosystems, it can be difficult to understand when where and how our services can fit together to produce the best results for users.

Signposting and referral partnerships and systems offer one way of supporting our users to access and benefit from a wider range of services in a more holistic and supported way, as well as providing an opportunity for us to learn and understand more about how users access services and what the outcomes of different combinations of interventions can be.

MdlR clarified some of the terminology used in the session:

- **Service bounce, hop, or jump** is used to describe the process of users accessing or being referred or signposted to multiple services. This can be due to the limited nature of the service being provided at each organisation and/ or the complex nature of the user's issue.
- **Mapping** is the process of researching the services available usually across a geographical area to support users. This work can be undertaken to understand the level of and gaps in provision but only provides a snapshot in time.
  It is incredibly difficult to undertake comprehensive mapping without the support of local networks and communities. It's also costly and time consuming to keep this information up to date as service offerings are liable to change frequently and repeatedly.
  Mapping at some level is usually a prerequisite to forming a signposting or referral system but, again, does not have to be done on an organisation by organisation basis – frontline networks and communities are often instrumental to enabling insight to and links with services.
- **Signposting** is the process of sharing information on other services that may be able to offer help with service users. It is then for those in need of help to attempt to access the services being signposted to. This enables users in need of further help to not leave a service "empty handed" but doesn't guarantee users will follow up with organisations or that services will have availability of services if a user does attempt to access.
  Signposting works best when there is a shared level of understanding of the services being provided and ideally includes a relationship between organisations. We're unclear how many signposting lists are developed in collaboration across services.
- **Referrals** are the end to end passing of a user from one service to another. The user benefits from a warm handover of their information and issue from one service to another and in ideal situations will be guaranteed access to the referred services, with other service providers having a higher level understanding of user needs and competencies.
  Referral networks allow users to access a multitude of services from any network access point, resulting in a "no wrong door" approach to delivering services. In order to adequately meet user needs, referral networks need to represent the range of services users are likely to need. They also need to include the necessary systems and partnerships that allow for the transfer of data between organisations, and account for changes in capacity and scope.

We have previously explored the role and value of community partnerships and networks, a lot of our most recent learning came from the evaluation and reporting of the community coordinated support programme, which presented at the Insights and Learning Session last year.

This learning gave us an insight into the importance of community partnerships between support service delivery networks in order to help people in crisis, it touched on the value of adding a system on top of these relationships and partnerships to enable users to travel between and access multiple services through a single gateway and that's where we pick up now.

You can find notes and recordings from that session [here](.).

However, we know from our work that while the benefits of a single point of access approach for support services is well acknowledged, the challenges and opportunities around implementing these initiatives haven't been fully explored.

Signposting and referral networks are one of a series of tools that enable us to deliver and monitor the impact of delivering the right service at the right time and, crucially, in the right way.

3. What goes into building a system?

Liz Reed, the Network Development Coordinator at the **Liverpool Access to Advice Network**, gave an overview of the origins of the Network, identified some of the key elements required for success, and explored the barriers and challenges to implementation.

Isabel Langdale, Project Manager of the **Women's Homelessness project with Homeless Link**, gave an overview of the importance of partnerships and relationships between organisations and examples of collaborative, community-focused approaches to supporting users in crisis.

Key reasons for working together identified by women and organisations include better outcomes for women, faster access to services, flexibility in meeting women's needs and wishes, support from a broad range of services with the necessary skills and knowledge, building better relationships with services through shared networks, breaking down barriers between services, and pooling resources and sharing responsibility to use organisational capacity effectively.

Tips for working together effectively include establishing women's centres that offer collocated services and multi-agency support, creating a single point of access for support from multiple agencies, convening opportunities where all services can be delivered at one place and time to meet women's needs efficiently, developing shared protocols and referral pathways to ensure smooth transitions between services, fostering a culture of trust, respect, and open communication among partner organisations, and regularly reviewing and evaluating the effectiveness of collaborative efforts and making necessary adjustments.

Dan Sutch, Director of **CAST**, shared his expertise expert on building cross sector referral tools, particularly in using an inclusive design approach to building systems. He shared some key learnings for successfully working across multiple organisations in a single location:

- Only a third of funding should go towards technology, with the rest allocated to team exploration and new collaboration methods.
- Aligned funding is necessary to create interventions that make a significant difference, rather than relying on numerous small-scale attempts.
- Funding should prioritise the creation, adoption, and improvement of open IP tools, as well as supporting existing teams to adapt and understand digital practices.
- Open IP (open-source Creative Commons tools) can ensure that everyone in the charity sector can benefit from shared insights and improvements.
- A shared approach to digital tools is essential, as it allows for a dedicated focus on their development and maintenance, which may not be a primary motivation for individual organisations.
- Collective progress and open IP are essential for sharing and reusing digital tools effectively.
- Design systems should align with actual behaviours and motivations rather than idealised ones.
- Small teams are more effective in developing digital tools than large teams.
- Involving frontline practitioners and community members in the development of digital tools is crucial for their success.
- Insight and knowledge from both formal systems and informal communities should be integrated to provide a comprehensive view of available support.
- Capacity management is crucial for effective referrals and signposting, as is understanding the stability and accuracy of information.

Attendees shared some comments.

Feedback on the sessions	Sage advice Liz & also some great insights into good and bad things and challenges. Thanks
	Isobel really good to hear you also acknowledge autonomy in all of the services you offer.
	Great to leave this meeting with Dan's words that its not all about the IT its about the relationships!
	Very good points that Dan makes about capacity, relationships, and funding
The role of funders	The key priority for us currently is asking funders to fund journeys that involve advice, end-to-end, and crucially from the perspective of those who need to make the journey.
	Totally agree Dan with the disjointed approach to funding this work over the last decade and the need for funding to better align on this.
	This is such a critical point. We'll look to pick this up in the Social Justice Funders Group we facilitate and include the MoJ in those discussions

4. What these systems give and tell us

Ben Scarlett, Director of the **Norfolk Community Advice Network** gave an overview of size, scale, and function of the Network and the work being done to make it sustainable. Please get in touch with ben at ben@ncan.co.uk if you have any questions or for further information.

The NCAN referral system is a successful example of a digital platform that facilitates referrals between organisations and provides analysis and reporting capabilities.

Key features of NCAN's referral system include warm handover, ensuring clients don't have to repeat their stories, and promotion of organisational updates and services through newsletters and announcements.

NCAN facilitates networking and collaboration through Champions networking events, Steering group meetings, and wider partnership meetings.

Benefits for clients include secure and quick contact with the most appropriate agency, while benefits for agencies include access to multiple organisations, secure sharing of client information, and data analysis to measure impact.

Comments and questions from attendees:

Questions and comments for NCAN	**Q:** The system and network, looks amazing. How is it funded? **A:** NCAN's funding model is based on universal access agreements with statutory organisations, where local authorities pay a set fee for access to the referral system.
	C: Thank you very much Ben - great work being done by NCAN. That question of funding and how you continue resourcing the work from funding cycle to cycle is really important. **A:** Part of our campaigning/influencing is around the need for sustainable funding for the sector as a whole to be able to continue to deliver advice. We're in a relatively fortunate position but as has been mentioned, we're very conscious that referral tools can contribute to the demand sectors are facing so it's about aligning those messages. We get very positive feedback to our system so that helps.
	Q: Just wondering if you have any non-Norfolk based national providers on the referral network. Is there a space for such organisations to get involved? **A:** We don't have any national providers on the list, mostly just local associations (i.e., Age UK and CA). It's something we could consider potentially depending on organisation. **C:** I guess it could be around where there are gaps in local advice provision? Food for thought - thanks. **C:** We are a national provider and as such we get to see firsthand the advice deserts across England Wales and NI and the lack of wider non legal support.
Other intersecting questions for consideration	Given the reality that there are not enough providers of free legal advice to meet the needs of the most vulnerable in our society and acknowledging that more referral systems are being created without an increase in service provision, how can we shift our focus towards collating data to evidence this lack of legal provision mapping how many clients who are referred on actually get the advice they need. We have firsthand experience of the "advice deserts" and the lack of mental health services and support for neurodiverse clients. How can we leverage our unique insights to identify the real gaps in service provision and raise awareness about these issues? as the issues don't go away, they get pushed up the line causing further distress to client. Furthermore, how can we use our knowledge and experience to advocate for more comprehensive services across the country?

5. Next Steps

Sharon Collard, Professor of Personal Finance and Research Director at the **Personal Finance Research Centre** gave an update on the collaborative research they have been working on with the charity Step Change regarding referrals into and out of debt advice.

A research project funded by the Nuffield Foundation will be published next year about how communities interact with advice and the pathways they take to support.

Key points for getting referrals right in the debt advice sector include identifying client referral needs, ensuring clients understand referrals and the ecosystem they're being referred to, understanding the timing and order of referrals, ensuring smooth and efficient online referral journeys, referring to relevant organisations, and using feedback loops to improve referrals.

6. Meeting Close

MdlR extended thanks to the speaker and those who shared their learnings and experiences via the chat, with the rest of the community.

Attendees were encouraged to share their feedback on the structure of the group and content of the meeting, including what would be useful to do more of moving forward.

Our next meeting will be the Justice and Innovation Group meeting **Thursday 7 December from 10-11:30am**. You can register here.