

Increasing Access to Advice through Referrals



**National Advice Sector
Development Forum
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Increasing Access to Advice through Referrals

AIMS OF THE ACCESS WORKSTREAM

- Improve clients' initial contact with advice services
- Improve access for disadvantaged clients
- **Improve referrals between advice services**
- Identify and support clients who can help themselves

*Resulting in 10% increase across the sector
in the numbers of people receiving advice*

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Access Facts

- Over a 5 year period, 40% of people will experience at least one legal problem
- Legal Services Research Centre found that up to 20% of people didn't seek advice
- Many people don't realise they have a legal problem or think nothing can be done about it
- Some groups (e.g. young people) are much less likely to seek advice than others
- Many referral networks fail through lack of funding and co-ordination

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Why people don't seek advice

- Don't realise they need advice
- Lack confidence or are afraid to seek advice (e.g. domestic violence, harassment)
- Not aware of advice services available
- Advice services are not accessible (location, physical access, language, cultural factors)

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Why people don't get advice

- Problems finding the right service – the “revolving door”: no effective referral system
- Lack of capacity within advice services
- Queues and waiting times: “the survival of the fittest”
- Particular problems of “hard to serve” groups in using traditional advice services

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“The client’s charter”

- I know that I have a problem which needs legal advice
- I am easily able to contact an advice service in a way that suits my access needs
- My problem will be assessed by someone who is competent to identify all the legal issues and to help me obtain the advice I need to resolve the problem

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Access routes and networks should aim to:-

- Minimise the number of contacts a client makes before receiving advice
- Include “problem noticing” and non-advice agencies within a referral network
- Identify and meet clients’ support needs: language, culture, physical access
- Develop and utilise the expertise of all network members: advice and casework skills; client support; local knowledge

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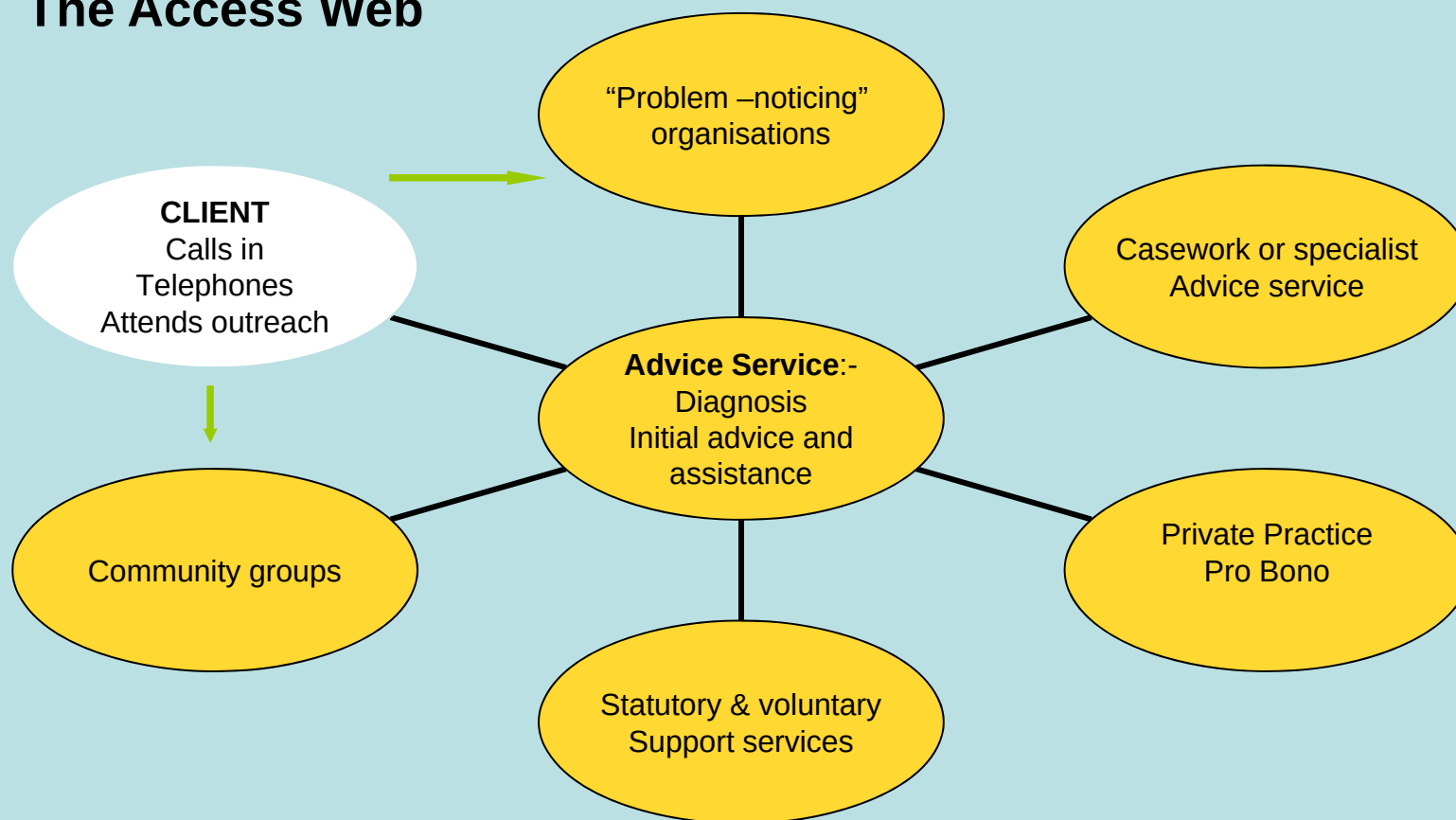
What do we mean by access?

1. The access route

- Knowing it's a legal problem: public legal education raises awareness of legal rights and remedies
- Direct and indirect routes to advice: client-based services are often the route to advice for “hard to serve” groups
- It is essential that the first agency approached:-
 - recognises the need for advice
 - is part of the advice/referral network
 - receives training and support for its role

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The Access Web



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What do we mean by access?

2. The intake system

- Improving the client's initial contact with the agency
- Assessing the problem and the client's ability to resolve it
- The right person for the task – allocating work appropriately between and within advice organisations
- Referral systems that work from the client's point of view

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The Intake System

Meet and Greet Triage

What kind of problem?
Can the client use the service ?
(meets eligibility criteria,
lives in the area etc.)
Can we help?
How urgent is the problem?

SIGN-POST/REFER

because:-

We don't cover that area of law
The matter is too complex
Client can't use our service
We have no capacity
There is a conflict of interest

RIGHT FIRST TIME

A routine enquiry or case:
Trainee or new adviser
A more complex enquiry or case:
Experienced adviser
Representation (court or tribunal):
Specialist adviser
Form-filling/help with routine
correspondence:
Volunteer/trainee

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“Developing Access to Advice” Workstream
12 agencies are testing 3 access models:-

- 1. Making Reception Work:** ensure that reception staff are trained to direct clients to the most appropriate source of help
- 2. Developing Community Partnerships:** create partnerships between advice agencies and community groups to improve access for disadvantaged groups
- 3. Managing Demand:** provide a clear definition of what the agency does (and doesn't do) and manage the flow of work through the agency

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Lessons from the pilots: what can help to improve access?

- Valuing the role of reception:-
 - training in reception skills and triage
 - A “receptionists’ charter”
- Formal links between advice services and groups serving “hard to reach” clients
- Establishing local advice networks which can act as a “seamless service”
- Effective diagnosis and allocation of work to the best person/agency

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Referral Networks: summary

- Referral is only one function of an advice network
- Success depends on knowing what all members do (and don't do) and their capacity to accept new work
- Networks can:-
 - monitor unmet need
 - create a “seamless service” for clients
 - present a united front to funders
 - act as local training and support mechanisms
 - undertake public legal education
 - Improve access to advice for disadvantaged groups
- But...effective networks need resources and funding