Notes from Common Ground Meetings – March 2001

The Common Ground Meetings in March 2001 took place in Aberdeen, Castle Douglas, Dundee, Edinburgh, Falkirk, Glasgow and Inverness and involved 54 staff. The meetings provided the opportunity for project staff to discuss: ‘Getting the Right Referrals’ and ‘Matching’:

1. Getting the Right Referrals

Befriending projects highlighted that they are dealing with a vast range of referral agencies with the most common being: Social Work Departments, Healthcare staff (GP’s, Health Visitors, Community Psychiatric Nurses), Schools, Educational Psychologists, Occupational Therapists, Army Welfare, Care Agencies, Employment Agency, Voluntary Organisations.

In addition to dealing with referral agencies many befriending projects also receive referrals from family members and neighbours.

For some befriending projects e.g. supported accommodation, hospital settings, referrals are in-house.

Finally many befriending projects take self-referrals from people interested in being matched with a befriender.

Trends in referrals were not generally discussed, but one mental health befriending project did draw attention to the fact that they were increasingly receiving referrals of older people in care homes.

1. The Referral Process

For most befriending projects the process of receiving referrals follows a pattern of:
Initial Contact / Completion of Referral Information / Assessment by Project of Person Referred / Matching

The main variations in this are a small number of projects who do not do an assessment of the person seeking befriending – they rely on the information provided in referral to make a judgement on a match.

i) Initial Contact – projects stressed the fact that they used this stage to determine the motivation of the referrer e.g. are they coming to the befriending project for positive reasons or just because they have “tried everything else”

ii) Completion of Referral Information – projects differ on whether referral agencies have their own stock of referral forms that they complete when they have a person to refer. Others retain control of referrals, by sending out a form for completion once initial discussion about the appropriateness of the referral has taken place. Other projects would only complete a referral form in conversation with a referral agency believing this to be the most constructive way to gain information that the project requires.

Projects are similar in that they all send descriptive information about their project to referral agencies, particularly new projects that are seeking to establish themselves.

Information which projects find helpful to send to referral agencies includes:
• Description of project’s criteria and of service offered (and what isn’t offered)
• Description of befriender’s role, in order to try to ensure an understanding of what befriending is about
• Case Studies showing the type of activity that befriending has involved in the past, and the people who have benefited from befriending
• Explanation of project’s procedures and reasons for them (e.g. explanation of the need for information which will enable risk assessment of isolated settings befrienders will work in)
• Flowchart of referral process – what referral agencies can expect to happen

2. Waiting Lists
Many befriending projects have a waiting list because their project is heavily referred to. The main difference in how projects manage waiting lists is whether all people on the waiting list are assessed, or whether this stage is held over until a time when there is more likelihood of them being matched with available befrienders.

Projects described their attempts in managing a waiting list to balance meeting people’s expectations of service, while ensuring that the project retains credibility for people who are waiting.

3. What is essential information to gain from a referral agency?
Projects discussed the information they saw as essential to gain from a referral agency. This varied greatly depending on the user group which the project serves e.g. children, older people, people with mental health problems.

The information which projects are commonly trying to gain from referral agencies includes:

i) Background to Referral
• Why is the person being referred? / why do they need a befriender? / how does befriending fit into a care plan they may have?
• Does the person know they have been referred? / Do they want to be referred? / Do they understand what befriending is and what it will involve? / What does the person want from the service?

• Who has made the referral? – name, role
• How long has the referral agency known the person?
• Date of referral (links to waiting list management)

ii) Involvement of Other People / Agencies
• What other support / people are significantly involved for this person?
• Involvement of family in decision about befriending (if relevant)
• General background situation, current circumstances, access issues etc.

iii) Relationship Issues
• Ability to form relationship / commitment to befriending
• Impressions or stated preferences about who the person might be best matched with
• How does this person sustain relationships?
• What is it like being in a relationship with this person?

iv) Health Issues
• Relevant information on health issues, disabilities, allergies etc.
• Health and Safety issues, including pets smokers etc
• Projects differed in the detail they sought on health issues
  e.g. one project asks for detail of medication taken, while another was more interested in how the person coped / managed their illness as opposed to medication information.
v) Boundary / Safety Issues
- Any issues e.g. behavioural, which might make a befrienders’ isolated role more difficult
- Emergency contact details

vi) Activities
- Hobbies, interests, activities that the person might like to do with a befriender
- What specifically does the person want from the service on a week to week basis?
- Any activities that would not be advised / they would not be able to do

vii) Other Information
- Person’s past occupation (can provide information to contribute to a good match)

4. Common Difficulties
“Some people have tried to use our project as a dumping ground when they have run out of other options”
“Some referral agencies want to refer and then be able to say they have closed their case”
“Some referral agencies try to tell us what they think we want to hear, rather than what is actually helpful for us”
“Sometimes they won’t commit more sensitive information to paper but want to tell you verbally”

5. Ensuring that Essential Information is Obtained
Many projects reported that they had experience of referral agencies having a different opinion on what was relevant information, and therefore the project didn’t receive information that they wanted. For some this had meant that relevant medical or dependency problems was not discovered until an assessment visit.

Others had experience of referral agencies providing what they regarded as too much personal information, seeming to assume that the befriender would be taking on the role of a worker.

Some projects had experience of referral agencies “ticking every box” in the hope of presenting a strong enough case to get a befriender, rather than presenting an accurate picture.

At a basic level projects themselves differ greatly in terms of the amount of information that they regard as necessary. Some feel that not knowing all background information allows befriending relationships to develop more naturally. Other projects view this as creating a bigger potential risk, as a full picture has not been obtained prior to matching.

6. Success Stories
Those projects which were happiest that the referrals they receive are appropriate, seemed to be longer standing projects with staff who had been in post for some time. These projects had had time to communicate what their project offered, as well as building up relationships with people in referring agencies who fully understood what befriending involved. Projects that dealt with referral agencies over the phone for individual referrals, rather than solely relying on paperwork were also happier with their referral process.

7. Self Referrals
The majority of projects have a procedure which enables them to receive self-referrals. Only a small number of projects noted that their referrals must come from an agency first, so they are effectively closed to self-referrals.

For most, the first stage in a self-referral involves the person providing a name of a referrer/referral agency to support their application. This therefore means that the procedure for self-referrals differs little from referrals through an agency. Projects acknowledge that
people cannot always provide a contact, or if they can then the worker nominated may well have less knowledge of the person than with other referrals. The issue for projects is then about how best to deal with a lack of background information. In this situation, some projects noted that they might do two assessment visits to ensure that all information is gathered.

A small number of projects were making particular efforts to encourage or work with self-referrals e.g. Reachout Arbroath (working with people with learning disabilities) noted that they are increasingly trying to encourage self-referrals, while Connect (Aberdeen based mental health befriending project) has a worker who specifically deals with self-referrals.

8. Contact with Referral Agencies after Referral
This issue highlighted a lot of variation between projects. The level of contact appears to depend on whether the befriending project views its support as part of an integrated package of support and care, or as support that is distinct from other services and quite personal to the befriended.

So for some projects, maintaining a link with referral agencies is an important means of:
- Having a named person in the event of a problem
- Gaining a positive contribution to reviews of individual relationships
- Receiving positive feedback from referral agencies about befriending generally e.g. social work really noticing a reduction in calls from person once matched with a befriender
- Planning future support for the befriended

However other projects feel that befriendedes would feel very negative about the project having ongoing monitoring in conjunction with the referral agency, and so this link is not established.

9. Referral Agencies and Evaluation
Only a small number of befriending projects specifically seek feedback on befriending from referral agencies through some form of evaluation.

Slightly more projects gain feedback informally on the impact of befriending on a particular person.

Overall, it was very noticeable that while referral agencies are in a position to comment favourably on the impact of befriending, and could provide useful feedback to guide development and support for funding proposals, few projects gain this feedback.

10. Referral Agency Paperwork Examples
Projects took time to look at example documentation relating to referrals (Referral Agency Information Leaflets and Referral Forms). For those unable to attend meetings who would like example copies, please call Befriending Network (Scotland) on 0131 225 6156.