Make effective referrals

Understand the principles of effective referrals
- Listen actively
- Provide accurate information
- Respect confidentiality and keep records
- Check the appropriateness of the referral

Know the Student Support services
- A wide range of services are available
- Be aware of them
- Services are delivered in multiple formats
- Contact Student Support if you are unsure

Refer to relevant sources of support
- Use the 'How to...' series for guidance on specific areas
- Refer to the staff guidance webpages
- Sign up for relevant training workshops
How to... make effective referrals

Understand the principles of effective referrals

Listen actively
Pay attention to what the student tells you. You may need to ask questions to clarify the nature of the enquiry so that you can clarify who might be able to help. Students may not ask to be referred but often this will be the most helpful outcome.

Provide accurate information
Keep up-to-date contact information to hand and be familiar with support services. The more you know about the service to which you are referring, the better.

Respect confidentiality and keep records
Details of a student’s problem should be kept confidential and not be released without explicit permission. Keep appropriate records.

Know the Student Support services
The University offers a range of support services that form a co-ordinated network of support and are an important part of the overall student experience.

You should have a working knowledge of the specific locations and opening hours of services in order to have confidence in signposting and referral.

Services are delivered in a variety of different ways:
- Formal / informal
- Drop in / appointments
- Paid staff / student volunteers
- During / out of office hours
- University, Students’ Union / partners
- Virtual / physical

If you are not sure what to do, contact Student Support in the first instance:
T 01206 872366
E sso@essex.ac.uk
www2.essex.ac.uk/stdsup

Refer to relevant sources of support
A lot of support is available for staff to support students as well as a range of resources to support you in your role. These include:

- Student Support
- The ‘How to...’ series for information on specific areas
- Staff guidance pages on the University web pages (www.essex.ac.uk/staff/)
- Staff development courses such as ‘Making Effective Referrals’, ‘Working with International Students’, ‘Disability Awareness’, etc
- Updates and mailing lists for staff with an element of support to their role
- Great resources on the web for you and your students

Tip: Facilitate a referral and minimise ‘running around’ by calling to check the appropriateness of the referral before you signpost the student.

Tip: Visit the Learning and Development website for relevant training courses. Visit www.essex.ac.uk/students/ for a list of support services.

Look out for more postcards in the series, e-mail Learning and Development (‘ldev’) or visit the website (‘/ldev/resources’).