



**CLEO**

Community Legal Education Ontario  
Éducation juridique communautaire Ontario

# What makes a good referral?

**Speakers:**

**Kirsten Tomcko, 211 North**

**Karen Milligan, 211 Ontario**

**May 25, 2022**

**12-1pm**



## What you can expect today

1 hour in total (presentation and Q+A)

This is legal information, not legal advice.

The information is current as of today's date May 25, 2022

Recording and slides will be sent out afterward.

Subtitles (closed captioning) has been enabled.



# Land Acknowledgement

CLEO's work takes place across the home and traditional territory of the Mississaugas of the Credit, the Haudenosaunee, and the Wyandot peoples, on land that many of us know as Ontario. We encourage you to take the time to understand more about the land *you* live and work on.

As we provide information on referrals today, we acknowledge the ongoing impact of colonization and anti-Indigenous racism, built into our organizations and systems, resulting in devastating pain and inequality for Indigenous Peoples of every generation.

We also recognize the incredible amount of work that Indigenous Peoples contributed to the Calls to Action in the Truth and Reconciliation Commission report calling for Equity for Indigenous Peoples in the Legal System.



## **Information & Referral Tips, Tools and Resources for Frontline Workers – CLEO Network**

**Kristen Tomcko, Manager, 211/Community Information, LSPC/211 North  
Karen Milligan, Executive Director, Ontario 211 Services**

# Poll

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Have you heard of 211 and have you ever used 211?

- Yes, heard of but not used
- Yes, heard of and used
- No, have not heard of 211

# What is Information & Referral?

*“Information & Referral (I&R) is the art, science and practice of bringing people and services together”.*

## Providing I&R

- Almost every human service organization performs some I&R

### Examples:

Providing a client with a referral to another service is I&R

Generally use I&R Services/products to get their information on what programs are available in the community

## I&R Organizations/Services

- Organizations/programs that are dedicated to providing I&R as a distinct service

### Examples:

211 Services



Creates/maintains databases of human services (i.e. online databases and print directories)

# Information & Referral Services

## Information & Referral (I&R) Sector is highly standardized

- Alliance of Information & Referral Systems (AIRS) is a North-American standard-setting and accreditation body for the Information & Referral profession.
- Measures compliance with expected practices within the field as defined by the AIRS Standards and Quality Indicators for Professional I&R.
- 27 Standards grouped into 5 categories:
  - Service Delivery (includes I&R delivery, advocacy, crisis intervention, follow-up, quality assurance and contact data collection)
  - Resource Database (inclusion/exclusion, structure, indexing, quality measures)
  - Cooperative Relationships (within I&R system, and with service delivery agencies)
  - Disaster Preparedness (business continuity, relationships with emergency officials, disaster resources, training and exercises)
  - Organizational Effectiveness (governance, technology, personnel management and training, promotion and outreach, quality assurance)

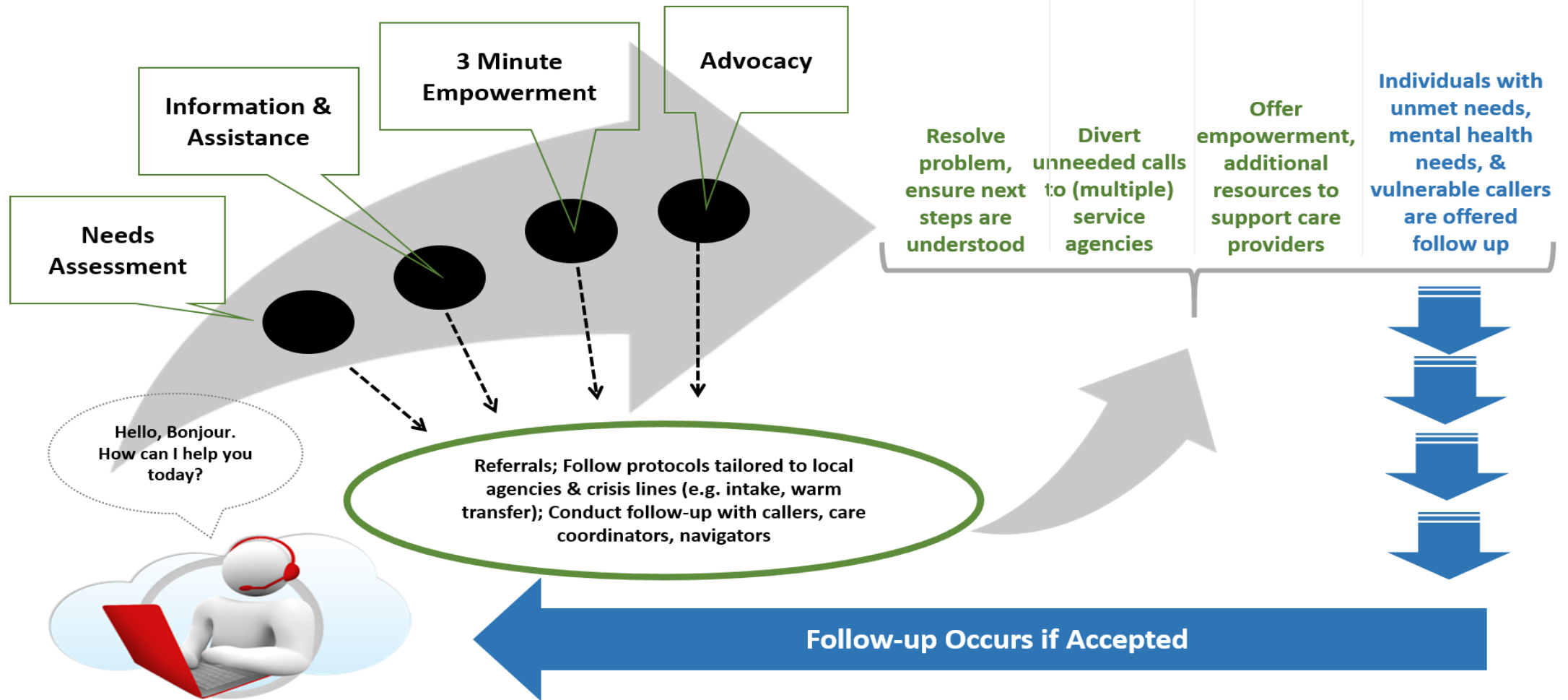


## 211 Services Providers in Ontario are:

- Accredited by Alliance of Information & Referral Systems (AIRS), and
- have Certified Specialists (Community Resource and Database Curators).



# Information, Assistance and Referral Process



# Poll

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How often do you provide referrals to government, community, health or social services?

- Every Day
- Weekly
- A few times a month
- Rarely
- Never

# What makes a good referral?

*Making a Referral involves identifying services that will meet the person's needs and by providing enough information about each option to help the person make an informed choice.*

Before providing referrals, a rapport must be developed

Strong communication skills and techniques are required to build rapport

- Active Listening
- Asking Questions
- Empathy
- Focus on Feelings
- Minimal Encouragers
- Personable Approach
- Prioritizing
- Reflection
- Simplicity
- Silence/Pauses
- Steering
- Tone

**Active listening:** a structured form of listening and response that focuses attention on the person and on what is being said.

**Empathy:** understanding the feelings of another and being able to imagine yourself in their situation.

**Reflection:** Using supportive and reflective language helps build rapport.

**Personal Approach:** Keep the conversation personable. Don't share too many details, but give the sense that you are a real person making a real connection.

**Simplicity:** Listen to the words the person has used. Choose your own words accordingly. Avoid jargon.

# How to make a good referral

## Understand the Need

### Assessment

Conduct assessment of the person's problem and need

- ask relevant questions to obtain the information necessary for an accurate referral
- determine any specific needs or preferences (e.g., language needs, evening or weekend hours)

### Clarification

Ensure accurate and complete understanding of the problem and needs

- avoids misunderstanding or misconceptions
- Lets them know they are being heard

### Asking Questions:

- Always have a reason to ask the question
- When asking personal questions, explain why
- Be respectful
- Avoid making people feel like they are being interrogated
- Ask follow-up (second) questions
- Paraphrase

### Types of Information Sometimes Needed:

- Age
- Address or general location
- Source of income
- Family composition
- Employment status
- Cultural or Faith community
- Health circumstances
- Access to transportation
- Preferred language
- Previous attempts at getting help for the situation
- Previous use of a particular service
- Ability to pay for item or service

# How to make a good referral

## Find Appropriate Referrals

### Search for Services

Determine the type of referral required and search for appropriate services

- Carefully check the services eligibility requirements
- A referral should not be provided if one does not exist (explore alternate solutions)

### Provide Options

Provide as much information about each service so the person can make an informed decision

- Do not provide too many referrals - this can be overwhelming
- Sometimes there is only one service available

Resource databases are maintained by I&R services, i.e., [www.211Ontario.ca](http://www.211Ontario.ca).

Selecting the most appropriate referral involves mutual problem solving.

Remember any specific preferences or service requirements.

Do not provide referrals for programs that you know will not help.

Be honest when there are no services available.

Explore alternate solutions when services are not available.

# What makes a good referral?

<b>What you <u>may</u> need to know about the person:</b>	<b>What to look for in a service listing:</b>
What do they need help with?	What services are provided?
Do they meet the eligibility criteria?	What are the eligibility criteria?
Where do they live?	What geographic area does the program serve?
Do they have the required documents to apply?	Are there any documents or application forms to apply?
What times are they available to access services?	What are the hours of operation?
Do they need free services?	Are the services free or is there a cost?
Do they have the means to access the service if virtual?	How is the service provided?
Are they able to get to the service location?	Where is the service located (if in-person)?
Do they need/want service in another language?	Are the services provided in languages other than English?

# About 211

- CRTC Designated 2-1-1 as the 3-digit dialing code for public access to information on social, government and community-based programs (2001)
- 211 first launched in Toronto in 2002, and by 2011, 211 service was available to all Ontarians.
- 211 now exists in most parts of Canada, and is supported by United Ways, local and provincial governments and other private/public funders.



## OUR VISION

Empowered People. Thriving, Caring Communities.



## OUR MISSION

To enhance access to services and strengthen community planning by stewarding an integrated 211 system for the wellbeing of people in Ontario.



## OUR COMMITMENT TO ONTARIANS

211 delivers a coordinated and integrated, one-stop gateway for the people of Ontario to access the quality community, health, and social services care they need when they need it most. Our services deliver an inclusive, human-centered, and responsive approach to emerging needs - we help break down barriers to improve access to human services that people need to thrive.



## OUR PARTNERSHIPS

211 has over 130 unique community and government partners that are working hard to support Ontarians. These partnerships range from pilot projects, launched projects, advisory committees, and protocols to be implemented in the event of a community emergency. [Learn more](#) about our current partnerships and how they benefit Ontarians by visiting our website.



## OUR FUNDERS

211 is generously supported by Ontario's Ministry of Children, Community and Social Services, local United Ways, municipalities, United Way Canada and private sector partners. During COVID-19, emergency funding was provided by the Government of Canada (in partnership with United Way Canada)

# 211 Core Functions



## System Navigation

Helping Ontarians connect to the community, health, social, and government services they need to be well.

3-digit phone helpline answered live 24/7, online searchable database, Live Chat/Text/Email Mon-Fri 7am-9pm

## Data/System Mapping

Collecting, analysing, and reporting on the services available, the demand for those services, and the barriers to access/service gaps.

More than 60,000 programs and services in provincial resource database, plus more than 300K contact reports per year (needs and unmet needs)

## System Design

Combining system navigation with data insights to inform better service design, integration, and delivery for Ontarians.



### Needs Identified

10,884

#### Date Range

1/1/2022 12/31/2022

### Total Needs Identified by Month

10,884

January 2022

Last Refreshed: 1/16/2022 4:20:00 AM

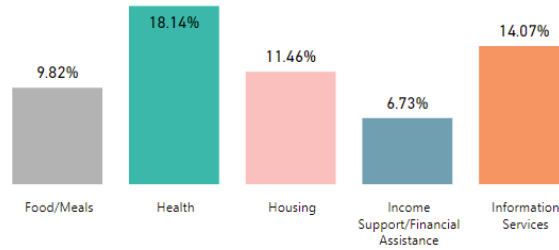
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Contacts	Overview
Unmet Needs	Sharing



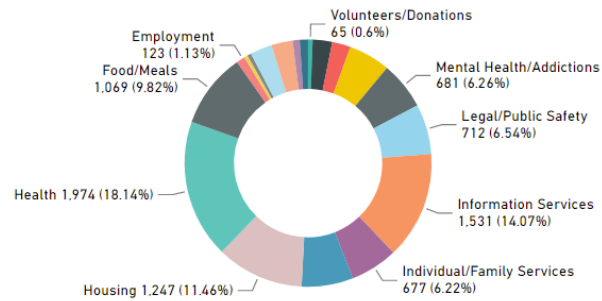
**Filters**

County/Region	▼
City	▼
Age Category	▼
Gender	▼
Language	▼

### Top 5 Needs by Needs Category



### Total Needs Identified by Needs Category



### Needs by Geography

County/Region	Total Needs Identified
<b>Toronto</b>	<b>3,709</b>
Toronto	3,709
<b>Niagara</b>	<b>1,070</b>
St Catharines	442
Niagara Falls	367
Welland	126
?Unknown	42
Thorold	24
Fort Erie	23
Port Colborne	19
Lincoln	9
Grimsby	7
West Lincoln	7
Niagara-on-the-Lake	4
<b>Simcoe</b>	<b>823</b>
Barrie	310
Wasaga Beach	81
Orillia	75
Collingwood	67
Midland	47
New Tecumseth	46
Bradford West Gwilli...	37
Innisfil	35
Penetanguishene	21
Tay	19
Tiny	18
Clearview	13
<b>Total</b>	<b>10,884</b>



# Unmet Needs Identified

183

Date Range  
1/1/2022 12/31/2022



## Total Unmet Needs Identified by Month

183

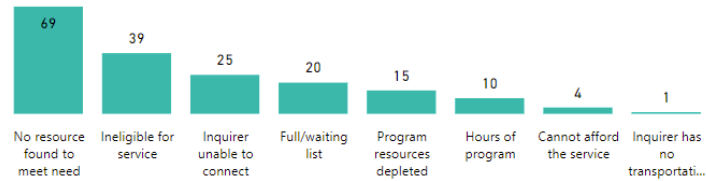
January 2022

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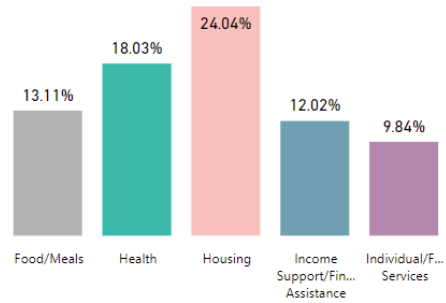
Menu	About
Contacts	Overview
Needs	Sharing



## Total Unmet Needs Identified by Reason



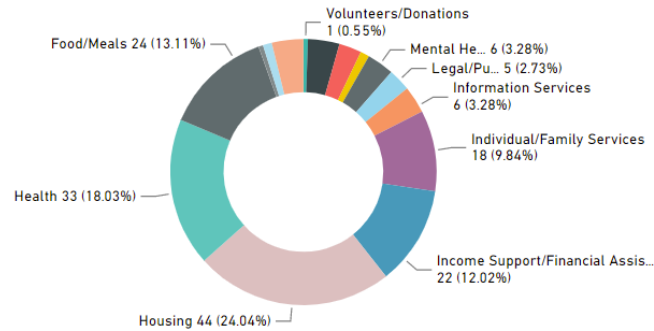
## Top 5 Unmet Needs by Needs Category



Filters

- County/Region
- City
- Age Category
- Gender
- Language

## Total Unmet Needs Identified by Needs Category



## Unmet Needs by Geography

County/Region	Total Needs Identified
<b>Niagara</b>	<b>35</b>
Niagara Falls	12
St Catharines	10
Welland	4
?Unknown	3
Fort Erie	3
Thorold	2
Port Colborne	1
<b>Simcoe</b>	<b>32</b>
Barrie	12
Wascana Reach	5
<b>Total</b>	<b>183</b>



Last Refreshed: 1/16/2022 4:20:00 AM

Menu	About
Needs	Overview
Unmet Needs	Sharing

Filters
County/Region
City
Age Category
Gender
Language

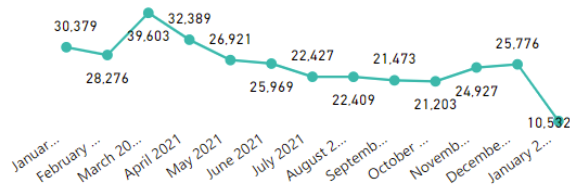
### Contact Reports

332,284

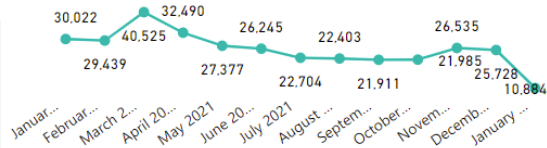
Date Range

1/1/2021 12/31/2022

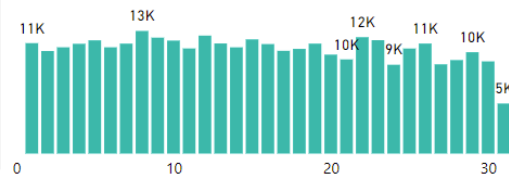
#### Total Contact Reports by Month



#### Total Needs by Month



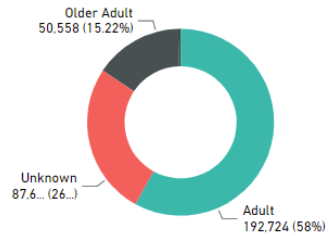
#### Total Contact Reports by Day of Month



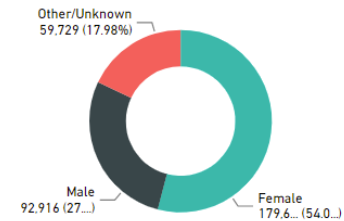
### Contact Reports by Geography

County/Region	Total Contact Reports
<b>Toronto</b>	<b>100,076</b>
Toronto	100,076
<b>Essex</b>	<b>45,802</b>
Windsor	40,935
Leamington	972
Amherstburg	800
Lakeshore	675
Essex	630
Kingsville	561
Tecumseh	475
?Unknown	366
LaSalle	339
Pelee	49
<b>Ottawa</b>	<b>30,500</b>
Ottawa	30,500
<b>?Unknown</b>	<b>25,681</b>
?Unknown	25,447
Gatineau	122
Winnipeg	20
Fredericton	17
St Johns	9
Katrine	5
Shannonville	4
Shawville	4
Val-Des-Monts	3
Ashton	2
Astra	2
Belle River	2
Chelsea	2
Dorchester	2
Glencoe	2
Maniwaki	2
Quyon	2
Whitehorse	2
<b>Total</b>	<b>332,284</b>

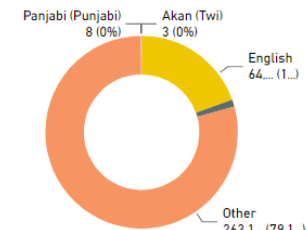
### Age Category



### Gender



### Language



# 211 - Powered by Partnerships



# Strategic Priorities for 211 Ontario

- **Enhance and expand** digital channels to increase the number of people served/connected to services.
- **Improve data quality and standardization** to increase interoperability with other systems
- **Boost knowledge sharing** for individual impact and system planning
- **Deliver a consistent 211 experience** for all stakeholders
- **Optimize Operating Model** for 211 service delivery in Ontario





## Contact information:

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Lakehead Social Planning Council, 211 North**

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**Karen Milligan, Executive Director,  
Ontario 211 Services**

[kmilligan@211ontario.ca](mailto:kmilligan@211ontario.ca)

**211 Dashboard**

<https://211ontario.ca/211-data/>



## Resources and supports:

### [CLEO Connect's tip sheets and referral information](#)

7 topics, including:

- detecting legal problems
- sources of online legal information
- legal services in Ontario

### [Steps to Justice Legal Topic pages](#)

Each sub-topic page gives links to:

- Questions and answers related to the topic
- Guided Pathways related to the topic (help with forms)
- Services: link to 211 and to legal services
- Tools and resources related to the topic

**Find your Community Legal Clinic**

<https://www.legalaid.on.ca/legal-clinics/>



## Calls to action: Truth and Reconciliation

- [Truth and Reconciliation Commission of Canada: Calls to Action](#)
- [Settlers Take Action](#)

## Education

- [Indigenous Canada - Free Course](#)

## Whose Land?

Learn about where you are situated, information for land acknowledgements and learn about the treaties and agreements signed across Canada (Turtle Island).

- [Whose Land?](#)



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# Thank you for joining us!

Subscribe to [CLEO Connect](#) for updates on new legal information and upcoming webinars.

**Contact me!** Brenda Doner at CLEO  
Brenda.doner@cleo.on.ca

