

Integrated Planning Table

Warm Transfer Guideline Final Report

Background

The Child Youth and Family Services Coalition of Simcoe County has identified four key strategic directions to ensure it meets its vision of “All children, youth and families thriving in a strong, nurturing community”. One of the strategic directions was to advance collective action to improve experiences for children, youth and families. A priority of developing cross sectional opportunities to solve issues was set. One of the issues identified was the lack of direct referral to help needed, or as referred to as a warm transfer.

The Warm Transfer Guideline was developed in recognition of the work underway with the Moving on Mental Health initiative, the Special Needs Strategy and the Autism Spectrum Disorder Partnership. The intent of the guideline is to support a culture within Coalition member organizations where patients, families, and caregivers are able to access the services they need within no more than two attempts of doing so.

These guidelines were developed in alignment with the Integrated Planning Table Terms of Reference and in particular, the core Functions of:

- Identifying gaps in services for children, youth and families in Simcoe County, facilitating discussion and developing an action plan to address the gaps
- Developing processes for cross sectoral protocols and pathways to service
- committing to system planning that incorporates the needs and goals of all children, youth and families

Purpose

The purpose of this guideline is to reduce the number of linkages a family or individual has to make so that no matter where they go within the system, they will be navigated to the correct resource as efficiently as possible.

Value:

We recognizes that it is often difficult for individuals and their families to ask for help. It is critical to provide support in a safe and confidential manner.

We also recognizes the need for efficiencies across our service systems; contributes to continued collaboration and partnership.

Definition

For the purposes of this guideline a Warm Transfer will be defined as:

An individual or their family member will be linked to the most appropriate resource (based on information given) as quickly and efficiently as possible.



Warm Transfer Guideline

This transfer can happen in the following three ways/scenarios:

1. The initial person receiving the request will immediately start a three-way linkage to connect clients and their families.
2. The initial person receiving the call will get the client contact information along with appropriate consent (as per respective agency protocol), connect with the appropriate linkage and leave the family's contact information, as well as provide the family with the same contact information. The individual providing the number will remain as a contact point should the client be unable to reach the suggested service provider.
3. Should the family request to follow up on their own, contact information for the linkage will be provided.

Best Practice Guidelines to Consider

- To help me find the best services for you,
 - is there a specific language you would prefer to receive service in?
 - are there any cultural considerations that would help me best direct you to service, for example First Nation, Metis, Inuit, immigrant, or services specific to the LGBTQ community?
- The individual receiving the call can use 211 as a tool to best locate the service within the region.
- Within two contacts, the individual will be connected to the resource they need.
- If a message is left, the receiving service will follow up with the caller within two business days.

Warm Transfer Pilot Results

Four agencies participated in the pilot:

Catulpa

CTN

EarlyON Simcoe North

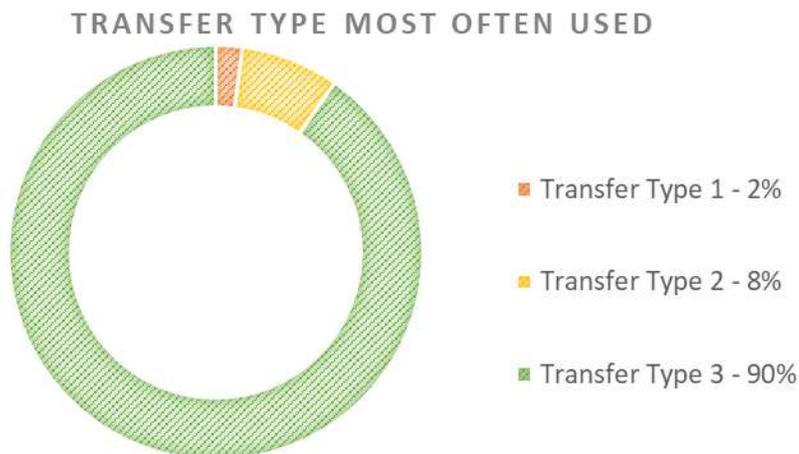
New Path

Evaluation Methodology

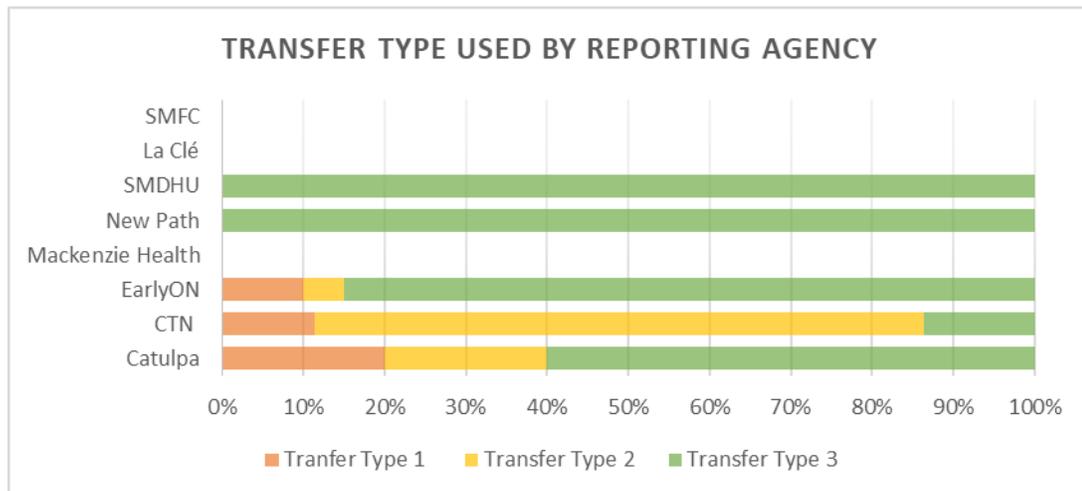
- Data was collected between December 17, 2018 – April 30, 2019
- Respondents were asked to track the number of times their agency transferred an individual or family to another service provider when their agency did not provide the service requested by the individual or family.
- The transfer was categorized under three definitions:
 - **Transfer Type 1:** Three way linkage is completed to connect a client and their family directly with the appropriate service provider immediately.
 - **Transfer Type 2:** The client's contact information is left with the appropriate service provider (consent per respective agency protocol). The family is also provided with the agency's contact information. The transferring agency remains as a contact point should the client be unable to reach the suggested service provider.
 - **Transfer Type 3:** The client is provided with the contact information of the appropriate service provider and follows up with on their own.

Findings

- As outlined in the below chart, over 90% of the time, participating agencies reported that Transfer Type 3 was utilized.



- Due to organizational policies and procedures, some member agencies cannot align with the Coalition’s approach. It was difficult to get a consistently implemented approach.
- There is significant variation between participating agencies. Some exclusively rely of transfer type 3, however others such as CTN rely on transfer types 1 and 2.



Recommendations

- While Transfer Method #1 (three way linkage to connect a client and their family directly with the appropriate service provider immediately) is recognized as the preferable warm transfer option, Coalition member agencies are encouraged to implement the Warm Transfer method that best aligns with their individual organization’s policies and processes.
- The Guidelines be posted on the Coalition website as a member resource.