



SAM's WORK

Suggestions for Successful Referrals

- ☑ **Get to know the community resources** that your particular clients are most likely to need. Visit the agency; get to know the staff. Identify a contact person. Have a general idea of services provided and the eligibility requirements. Be aware that these may change and that eligibility is often a complicated issue. It is wise to talk to an agency staff person at the time the referral is made to ensure that services are appropriate and available.
- ☑ **Build rapport with your client.** Establish credibility. A client is more likely to follow through if you are respected and trusted to provide helpful information.
- ☑ **Listen carefully.** **What are the priorities** or most important issues for your client? You may see other needs, but the referral is much less likely to be successful if the service is not deemed important to the client. If you feel that the referral is urgent or a priority, your first step may be to educate the client and increase awareness about the value of the particular program for him or her.
- ☑ **Don't overwhelm client.** Make one, or at most two, referrals at a time. Identify and address barriers to accessing services. The application process, cost, language, child care, and transportation may be issues.
- ☑ **Assist client** by providing contact information in written form. Suggest that you make a telephone call together to get additional information on services and eligibility, to request an application or to make an appointment. Client may have other questions for program staff. If you intend to send a referral to the agency yourself, inform client and obtain client's approval.
- ☑ **Follow up with client** regarding the referral, either by telephone or at the next visit. Was the application completed or the appointment kept? If not, what were the issues? How can you help?