

Empower Families for Successful Referrals

Families often have complex needs that no one program or resource can meet. However, navigating the path from identifying a need to accessing a community service can be challenging.

The best practices outlined below grew out of information shared by families regarding their own experiences accessing resources. In order to feel empowered during the process families said they want to be:

- Well-informed about the resources available in their community.
- Involved in choosing where they receive services.
- Informed about where they are referred and what to expect from the referral process.

Some communities use electronic referral applications, such as IRIS, to make and track referrals. Organizations in these communities have access to additional features to support best practices for making family-informed referrals.

Incorporate the following tips into your practice to encourage families to actively participate in the process of selecting and accessing the resources they need.

Empower families by helping them explore and understand your community's resources:

- Discuss common ways to locate resources.
- Provide families with existing community resource guides, brochures, and online resources such as the Parent Helpline app: helpmegrowks.org/get-connected
- Encourage parents to utilize existing connections to build their knowledge of resources (for example, their doctor, school, family, other parents in the community, etc.).
- When possible, discuss multiple resource providers as options for referrals.

Empower families by involving them in choosing where they receive services:

- Cultivate parents as advocates. Use the **Family Support Worksheet** to help parents articulate their needs and self-identify the services and support they wish to receive.
- Use strength-based language when speaking about referrals. Discuss referrals in a manner that promotes and emphasizes parent choice.

"Our community offers many services to help with all kinds of challenges families face."

"Of the services we've discussed, which sounds like it might best meet your needs?"

"How do you prefer to be connected? If you'd like, I can contact them. Or, you can call them directly. It's your decision; let me know how I can support you!"

- Use local resource guides and tools such as IRIS or the Parent Helpline to empower families and build parent autonomy. Review resources together and discuss options. Enhance the parent's knowledge of service descriptions and eligibility criteria; support the parent's decision.

IRIS

When making the referral in IRIS, involve the family in the IRIS referral workflow. Share the Partner Selection screen with the family and together explore community resources that meet the identified need. Review the purpose and eligibility of potential referral options with the family. If the parent wants to contact the services, take a screenshot of potential services' IRIS Organization Cards to text or e-mail to the family.

- Meet families where they are. Acknowledge that a family may not be ready to receive a referral immediately after identifying a need. If a family isn't open to pursuing a referral today, remember to review available resources and offer to make connections in the future.

Empower families by informing them about where they are referred and what to expect from the process:

- Emphasize families' understanding of where they are being referred by providing a brochure, recording important information about the service on a sticky note, printing a screen from the service provider's website, or sending a text message with the resource contact information.

IRIS

When making a referral in IRIS, the Client View feature makes it easy to provide families with a printable summary of referral information. After making a referral, click on the Referral Card. Selecting the Client View button in the upper left-hand corner will open a print preview window using your default print options. This view will include the contact information, website, eligibility criteria, and purpose of the organization to which the family has been referred. Print the screen or save it as a PDF to share with the family via email. If you've made the referral on a phone or tablet, take a screenshot of the Client View and text it to the family.

- Provide details to orient the family to the service provider including:
 - A brief summary of the service offered and how it relates to the identified need.
 - When possible, the name of the person who will make contact.
 - A timeline for follow-up. Discuss when and how to follow-up on the referral if they aren't contacted within the expected timeframe.
 - A sense of what to expect from the initial phone call. Will they be contacted to schedule an appointment? Will the conversation include screening questions? Will the client be expected to provide information that wouldn't be readily accessible?
- When possible, speak authentically from your experience about what to expect ("I expect Susie will call you this week. She's helped a lot of families I know and is very easy to talk to.")