

Offering Referrals

Very often, people come to a program with multiple challenges, and a single program cannot meet every need. In order to holistically meet people's varying needs, program staff and volunteers need to be equipped to connect people to other community programs through strong referrals.

Effective referrals involve the following components:

1 Reflect on Values

Staff and volunteers must first reflect on their values and beliefs. It is essential that staff and volunteers embody a strength-based view of people and approach interactions through the lens of **cultural humility**. This means they are careful to reflect on any bias they are bringing into the interaction, take on a posture of life long learning about themselves and others, and seek to work towards justice.

2 Understand Needs

In order to offer a referral, staff and volunteers must first understand a person's needs. Learning about needs requires staff and volunteers to build trust and relationship, ask open ended questions, and listen well. It can also be helpful to learn about the needs in the community where the program is located. Census data, community reports, as well as 211counts.org are excellent data sources.

3 Educate Staff and Volunteers

Learning about local programs enables staff and volunteers to refer to a program that is likely to be helpful. It is important to know about programs that meet a variety of needs including food, housing, mental health, childcare, education, parenting support, child development, and physical health.

Be sure to learn the specifics of each program, including how it helps, eligibility requirements, enrollment process, location, and any other relevant information.

United Way 211 is an excellent data source to learn about local programs and is available in many states.

4 Have Information Available

When information about community programs is readily available, staff and volunteers can more easily provide it when needed. This involves having printed materials available to be handed out as well as PDFs and weblinks that can be texted or emailed. When making a referral, it is best to ask the person how they prefer to receive information.

Some programs offer a **resource center** where a variety of printed materials are displayed and available for people to take. Resource centers may also include computers where people can complete applications or search for jobs and community programs. Staff and volunteers can then make themselves available at the resource center to answer questions and share information about community programs.

A **resource guide** is an organized listing of community programs that can be used to make referrals. It is recommended that each program create a resource guide detailing programs in their local community. Staff and volunteers can select key programs contained in the resource guide and offer printed resources about them.

5 Provide Information

Consider how staff and volunteers will build relationship with people served and offer referrals. Is there time built into programming for interaction? Are there giveaways at a community event that draw people to a resource table and into a conversation? Does the program offer one-on-one support, such as coaching where people will discuss their life situation? Regardless of the strategy, it is important that all interactions are strength-based, empathic, and collaborative. When staff and volunteers help a person connect to a program by assisting them with scheduling an appointment or completing an application, it is called a **“warm referral”**. Warm referrals are considered a best practice.

6 Offer Prayer

Once a person shares a need, there is a natural opportunity to offer prayer. The need can be lifted to the Lord who is “our refuge and strength, a very present help in trouble.” (Psalm 46:1)

7 Follow-up

Follow-up after a referral has been made can be a source of encouragement, support for navigating challenges, and an opportunity to deepen relationship.

Information about community programs can be shared during...

A program that meets human service needs



Example: A food pantry sets up a resource center with a volunteer available to answer questions and printed resources for people to take home.

A community event



Example: Church leaders participate in a community event where they share information about their church programming and community programs. They offer giveaways to draw people to the table and then provide information based on interest.

A door-to-door community outreach



Example: A church shares information and prayer through a door-to-door community outreach in the neighborhood surrounding their church. They select community programs to share about based on census data about community needs.

A one-on-one interaction



Example: During a pastoral counseling session, a pastor learns that a family does not have enough food and offers a referral to a local mobile food pantry.

A church service



Example: Ministry leaders set up a resource center with printed resources available for people to take home after a service. Volunteers are available to answer questions and offer prayer.