Checklist for Making Successful Referrals

☐ I have an adequate understanding of the client’s situation and perceived needs.

☐ The client and I have talked about how to prioritize these needs and what options exist to help address them.

☐ He or she is willing and ready to be referred.

☐ "We have discussed what issues might make it difficult for him or her to follow through with the referral."

☐ I am familiar with the agency to which I am referring the individual, including its eligibility requirements and services?

☐ The agency has the capacity and willingness to serve people experiencing homelessness in a knowledgeable and respectful manner.

☐ I have a working relationship with at least one staff person at this agency who can provide useful information and help advocate for the client.

☐ I have considered whether or not to accompany the client based on the individual’s:
  Ability to negotiate complex social situations
  Ability to provide and receive information
  Ability to tolerate waiting
  Level of ambivalence about seeking help
  Interpersonal style (passive to argumentative)

☐ If the person is going alone, I have provided sufficient information and “coaching” to help make the referral successful?

☐ I have made a plan to follow up with the client to see how things went and to determine next steps?

☐ I have a backup plan if this referral fails to work out for any reason.

References:  Long and Jacobs (1986:4-32--4-33); Schutt and Garrett (1992:61-64); Wood (1992:41-42)