Module 5C: Effective Referral and Linking

Purpose

The purpose of this section is to ensure that outreach workers understand the elements required for making successful referrals.

Recommendations for Instructors

The learning activities in this section are designed to engage participants with the subject material using informative and interactive approaches. Instructors will need to determine which, if not all, of these activities to carry out depending on a) participants’ learning needs and interests, b) the focus of the training, and c) time available.

Instructors are encouraged to prepare for each activity by reviewing the handouts to be given to participants and by reading the recommended resource papers and materials that are listed. These papers and materials, along with other relevant resources, will provide useful background information to assist in fulfilling the purpose of this section. The amount of time suggested for each activity should be adjusted as needed.

ACTIVITY 1 Making Successful Referrals

Purpose: To emphasize the required ingredients for making successful referrals

Time: 20 minutes

Materials: Handout: Checklist for Making Successful Referrals

Preparation: Be familiar with the handout, activity instructions, and be prepared to facilitate a group discussion.
**Procedure:**

1. Introduce the activity by noting that successful referrals in the HCH outreach context require more than giving someone a name, phone number, and wishing them good luck. As needed, review the various personal and systemic issues that hinder homeless people from accessing needed help.

2. Refer the group to the Checklist for Making Successful Referrals handout that has been created to remind workers of issues to consider in referring clients. You might choose to initially review the checklist with the group without much discussion, or simply move on to the next step.

3. Instruct each participant to think about a homeless client with whom they are working or have worked in the past. Have them identify a particular need (e.g. medical care, ID, public assistance, shelter/housing) for which a referral is required. Go through the checklist in order. Determine both the client’s and the worker’s readiness to make a successful referral. Factor in the client’s readiness in regard to the Stages of Change Model (Module IV). What still needs to be learned or negotiated to prepare for a successful referral?

4. Facilitate a discussion with the group about what they observed about making successful referrals in the scenarios they reviewed. Any new insights? Issues to consider that are not on the checklist? Strategies to ensure clients make it to appointments? Thoughts about how to use the checklist as a visual reminder in the office?

**ACTIVITY 2 Referral Role-plays**

**Purpose:** To practice skills in dealing with various referral situations

**Time:** 25 minutes

**Materials:** flipchart, marker

**Preparation:** Review and plan ahead for carrying out the steps of the activity.
Procedure:

1. Explain the purpose of the activity and the value of practicing responses to various scenarios that might occur.
2. Ask the group to brainstorm for about five minutes about various "sticky situations" they might encounter when going along with a client to see someone at a referral site. Write these on a flipchart. Encourage participants to be as specific as possible. If needed, prompt them with some of the following examples:
   - The client refuses to cooperate, e.g. will not give needed information or sign any paperwork
   - The person to whom the client is being referred treats the client in a paternalistic manner, directing his/her statements to you as the worker instead of the client
   - The client is too confused or psychotic to track what is going on
   - Despite having a set appointment, the client and you have been waiting for forty minutes past the time. The client is oblivious to this but you are becoming very irritable.
   - The person to whom the client is being referred shows not-so-subtle fear and contempt towards the client
   - The client is angry, hostile towards the receptionist who becomes very flustered and upset
3. Have the group choose three of these scenarios to role-play.
4. Divide into small groups of three. Each person in the group will take turns playing the role of 1) outreach worker, 2) homeless client, and 3) the person/agency to whom the client is being referred.
5. Instruct the groups to role-play each of the three scenarios, rotating roles for each of the three so that each participant plays all three roles. Allot approximately 15 minutes to complete the three role-play scenarios.
6. Close the activity by taking time to discuss what issues and insights came up during the role-plays.
ACTIVITY 3 Establishing Clear Working Relationships with Other Agencies

**Purpose:** To establish clear and mutually agreed upon working relationships with other agencies through the use of a memorandum of agreement (MOA)

**Time:** 15 minutes

**Materials:** Handout: Sample Memorandum of Agreement

**Preparation:** Review the sample MOA in the handout and other inter-agency agreements to which you have access, especially from organizations represented by participants.

**Procedure:**

1. Review the purpose and value for outreach workers to have a written memorandum of agreement with other agencies in which they work, have frequent contact (e.g. shelters, drop-in sites), or to which they make referrals. In some cases other agencies will agree to give priority to referrals made by your program or provide other specialized services.

2. Review the sample MOA on the handout with the group and/or any other agreements you might wish to examine. Invite questions or comments for discussion. Urge participants to think about agreements they wish they had with other agencies and how such agreements might be reached.

3. Encourage participants to review existing written interagency agreements in their own work settings that apply to them. Suggest that if none exist they discuss this matter with their supervisors and team to determine the value and importance of creating an MOA with other sites.