



PRINCIPLES FOR SERVICE REFERRAL AND OUTCOME MANAGEMENT

A core role for resident services staff is referring a resident to an outside service provider that can fulfill the resident's goals or address his or her needs. In order to ensure that the best possible match is made between the resident and service providers, resident services staff must identify and assess service providers before establishing partnerships. There are eight core principles to keep in mind when designing referral and follow-up systems for resident services programs:

1. If you wouldn't use a particular service, then carefully consider whether or not you want to refer a resident to use that service.
2. Attempt, as best you can, to make sure that the resident is truly interested in obtaining services and following through with the provider's programming. If too many of the residents you refer express disinterest in the provider's services it could negatively impact your partnership with that provider.
3. Be knowledgeable about the service provider's program offerings and help residents prepare to enter the program. For example, if you are aware that a resident does not possess business attire or a social security number, take care of these issues before sending the resident to a workforce development provider.
4. Touch base with both the resident and the provider within the first week to follow-up on how things are going from both perspectives.
5. Keep checking in with the resident and the provider as time passes. Document progress or lack thereof.
6. On a monthly basis, take the time to compile data on referrals made and their outcomes. Analyze the data and determine areas of strength and areas that require improvement.
7. Share your perception on the outcomes with the residents and your provider partners. Express your interest in working together to achieve success for all involved.

8. Document and disseminate your outcomes to all stakeholders. Include both your successes and your plans for addressing any shortfalls. Evaluate where the program is compared to the targets that you established during the program's design.

Remember, without data on the outcomes of your referral services, your organization will lack a dependable mechanism for responding to residents' complaints or funders' requests for information. If you believe you provide a great service to your residents and the community, prove it by measuring it!

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