national healthy marriage resource center

Referral Partner Organizations:
How to Approach and Engage Them

It is important for any healthy marriage and relationship program to make strategic partnerships with organizations that can make referrals.

This tip sheet will provide guidance on:

1. what you need to know before making the first contact with potential partner referral organizations;
2. how to pique their interest in your healthy marriage (HM) programs;
3. how to approach potential partner referral organizations;
4. what to communicate to them about your HM program.

So you've identified potential partner referral organizations, now what?

There are some important action steps between identifying and meeting with the potential partner referral organization.

Now, the focus naturally shifts to how to get them interested and on board with your HM program. While it makes sense to think that the next step is to immediately contact the organization and schedule a meeting, the experts recommend otherwise.

The information and quotes in this tip sheet were informed by participants of a Moderated Audio Forum (MAF) hosted on August 22, 2007.

Participants were identified as experts on the topic by their Federal Project Officer. The participants of the MAF included:

- **Jennifer Baker** – Forest Institute of Professional Psychology
- **Cosette Bowles** – Alliance for North Texas Healthy Effective Marriages
- **Deborah Cave** – Colorado Coalition for Adoptive Families
- **Carolyn Curtis** – Healthy Marriage Project of Sacramento
- **Andrew Daire** – University of Central Florida
- **Colleen Ellingson** – Adoption Resources of Wisconsin
- **Alicia La Hoz** – Meier Clinics Foundation/ Family Bridges
- **Dennis Stoica** – California Healthy Marriages Coalition
- **Carolyn Wiseheart** – Texas-San Angelo

The MAF was moderated by Umi Chong and Patrick Patterson of the NHMRC.

What do you need to do and know before you make the first contact?

"It's been my experience that we've been most successful when we do our homework before the call. If … we spend a lot of time understanding what their program is and what their needs are and frame what we're doing and how we can help them meet their mission and meet their goals, then we have a much, much higher success rate."

Experts emphasize the importance of doing more research on the organization before making any contact. One expert said, "After identifying a partner, do your homework on the partner organization!" While you may think you have gathered enough knowledge about the organization during your selection process, do more research on the organization to better understand them. This information will help you to tailor your communication with the potential partner organization.

Learn more about the organization's mission, priorities, needs, programs, and influential staff.

The experts recommended going to the organization's website or other publicly accessible resources to learn about their mission, priorities, programs that they currently offer, as well as the needs for their clients. Additionally, they stressed learning about the staff, particularly the "people of influence" within the organization. For example, one HM program, in doing their homework, found out that the board president of the potential partner organization played a critical role in driving the organization. Based on this finding, the HM program knew they needed more influential support to connect with the board president. Their strategy was to bring someone from the state agency with them to the initial meeting to facilitate the referral relationship. Another HM program shared that after they had visited a potential partner referral organization's website, they better understood the organization's top priorities. For each priority listed, this HM program identified two or three ways building healthy marriages supported those priorities.

"After having done our homework, [we try to identify] what it is that we can do for them. And we find that niche, because we're not looking for somebody to give us something. We're looking to give and finding where that is, so that [the referral relationship] can be something mutual."

How do I pique the interest of my potential partner referral organizations?

The experts agree that identifying and creating opportunities that allow you to learn more about the organization and find out first-hand about their priorities are key to piquing their interest. These opportunities demonstrate three things to the

Identify and create face-to-face, inperson opportunities to make some initial contact.

referral organization:

1. You are serious about serving their target population.
2. You are willing to take the initiative in developing a working relationship with them.
3. You want to know more about their needs.

Use opportunities to listen and learn.

When making early contacts, it's best not to be demanding or to exert pressure, but instead, listen to the referral organization. Here are some examples to pique interest without pressuring the referral organization:

- Hold a community discussion roundtable and invite the leaders of the potential partner referral organization to speak about their organization.
- Invite potential referral organizations to your monthly board meeting, coalition meetings or host community forums.
- Identify a coordinating agency in the community and offer your facility to host the next quarterly meeting of community organizations that includes its constituents.

In these examples, HM programs strategically leveraged opportunities to not only learn more about the needs of the potential partner, but also to make brief contact that they could later use as a reference point when attempting to secure the initial face-to-face meeting and access to people of influence within the organization.

How should I approach the initial contact?

While it's important to be prepared with talking points, experts emphasized that you don't want to give a "canned pitch." Experts noted that the initial conversation should be a sincere dialogue focused on the referral organization.

Focus on their mission and goals. Then frame what you do in terms of how it will further their mission.

Highlight your understanding about their organization and its needs and challenges. Frame your "offering around them rather than pitching what you're doing."

Tailor your presentation of the HM program to the individual needs of the organization. Articulate how the HM program fits into meeting their organizational needs and priorities.

During the initial contact, experts stressed the importance of listening to what the potential partner referral organization has to say. Briefly process and paraphrase what they said incorporating some of the things that they mentioned while introducing the HM program. For example, if the organization serves the child welfare population, respond by including how the HM program may help the parents by equipping them with better communication and conflict resolution skills. Also, point out how that will create a more positive environment for the child. The homework you did prior to the meeting becomes very beneficial at this point because you already have an idea of what their needs are and can clearly link what you're hearing and learning about them with the HM program and how it could be of service to them.

Additionally, the experts noted that gaining access to and meeting with somebody in the organization is

Top-down or bottom-up---It doesn't matter where you start, but the relationships you cultivate along the way with staff who will champion your HM program are essential.

the most important thing because it serves as a starting point. Experts shared that they've met with staff at the top levels as well as front line levels. They emphasized the importance of meeting with other staff levels to make sure there is buy-in and support for the HM program throughout the referral organization. Experts noted that it's not about titles, but about cultivating relationships with all staff members — at any and all levels — who will then champion (support or "cheerlead" for) your program to make the referral process happen. Support at all levels may translate into some or all of the following:

- Administrators endorsing the HM program
- Managers allowing you to speak at staff meetings
- Front-line staff knowing about your HM program and keeping it on their radar screen when servicing clients.

What do I communicate to them about my HM program?

Share program goals, service description, class syllabus and schedule, skills learned, and any supports provided that will facilitate participation.

Experts noted that communication about the HM program should be concrete, concise, and brief. Also, communication should highlight how the skills learned in the HM program will bebeneficial to clients as well as help the referral organization meet its priorities. Some HM programs have developed a "one-pager" that covers:

- HM program goals
- Description of the services (remember, not everyone knows what marriage education is or its benefits)
- Description of how the classes will run and what will be covered in each class (the logistics of the program schedule)
- What skills and benefits participants are likely to gain by participating

Experts stated that it's very useful to emphasize that the service is free or low cost and if food, transportation, and childcare supports will be provided as this demonstrates that your program is really thinking about the clients and their needs.

Tips for Approaching and Piquing Interest of Potential Referral Partner Organizations

Based on their experience, the experts have identified some subtle yet important action steps and strategies for preparing for that first introductory meeting.

- ✔ Approaches are most successful and effective when you do your homework before the

Tip: To prepare, ask yourself "What is it that we can do for them?" To find where your HM program can fit in with theirs, ask yourself, "How does my HM program help them achieve their mission?"

initial meeting. You can't just talk about your program, but must understand the potential referral partner's organization and frame HM services in terms of how it would facilitate their organizational goals.

- Try to identify a mutual contact to broker the referral relationship. This individual may be a staff person, board member, former employee (with a good reputation) or a trusted community leader who can advocate on your behalf. Use your personal and professional contacts and brainstorm with colleagues about potential "brokers" who have an existing relationship with your potential referral partner.

Tip: Reference your affiliation to the mutual contact (or broker) in the initial meeting.

Tip: Approach the gatekeeper about good forums to present information to various staff. Offer to bring donuts or bagels to a morning staff meeting where you present a HM program overview. Just as incentives are effective at attracting participants, they can help attract referral partners too!

- Look for opportunities to meet with as many levels of staff at the referral partner organization as possible. One HM program that did not do this found that that while administrators supported the HM program, front-line staff did not because they were overwhelmed with existing tasks and neglected to make HM program referrals. While you may not always be able to meet with all levels of staff, do you best to identify and work with organizational gate keepers to get their input on how and who to reach within the organization to get support.