

# Selecting Partner Referral Organizations

## How can you effectively partner with referral organizations?

This tip sheet will provide guidance on 1) what a partner referral organization is, 2) why partner referral organizations are important, and 3) what you should look for in selecting partner referral organizations.

### What is a “partner referral organization?”

A partner referral organization is another community organization or program that agrees to refer or send their clients to your healthy marriage (HM) program for services. Oftentimes, the referral arrangement works in both directions. In this manner, the partner

Partner referral organizations don't deliver the services, but deliver clients by referring them to your program.

referral organization does not deliver your HM services. Instead, the partner referral organization agrees to identify clients in their programs who would benefit or are interested in HM services, and refer these clients to your HM program, and vice versa, you would refer HM clients who need or would benefit from their services.

### Why do I need partner referral organizations?

No program is an island, relying entirely on itself for success. Successful programs know that other community organizations are necessary to support

No Healthy Marriage program is an island particularly when it comes to recruitment.

and enhance their services and better meet the needs of their clients. In fact, successful programs know how to select and develop relationships with other community organizations. Community partners can strengthen HM programs by offering additional resources and facilities, providing input on improving the quality of services, leveraging organizational assets, and extending the reach of their program deeper into the community.

This is particularly true for recruiting potential clients into the program. No matter how well developed your program is, or how capable your staff and facilitators are, recruitment is an ongoing challenge for programs. Recruitment will become increasingly harder, more resource intensive, and time consuming



because you have to find more new participants within the target population. This may lead to burn out among staff as they feel that they have exhausted

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 Wisenheart**—Texas/San Angelo

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

their outreach opportunities. One way to avoid this is to set up productive referral partnerships with other organizations to facilitate referrals and the longevity of your HM Program.

## What should I look for in selecting referral partner organizations?

Don't jump in too fast and partner with any or every organization in your community. It's better to do your homework and identify the right organizations with which to partner. While some experts recommend you go to the largest organizations in your community to get the "biggest bang for your time and resource investment," other experts argue that going to smaller organizations that have a "closer pulse on the community" pays off and yields an equal number of referrals.

Slow down and think strategically. What organizations share your passion and would give you the most referrals for your time and resource investment?

In any event, most experts agree that it's better to invest time upfront to identify community organizations that share the same passion for serving your target population and value healthy marriage. These partners can be productive because they understand what you offer and feel that your program will benefit their clients.

## Criteria and Tips for Selecting Referral Partner Organizations

As one expert noted, "potential partners are initially very enthusiastic ... [however], good intentions are not [always] sufficient." Here are some criteria and tips experts highlighted to consider in selecting your referral partner organizations.

- Look for organizations that share your passion to serve the community but are not necessarily equipped with the capacity to do so. Alternatively, identify organizations that offer relationship education services but do not have the capacity to expand and serve new segments of the community.

**Tip:** When approaching these organizations, demonstrate how HM services add to the services they offer. HM services may fill a gap in their service offerings or complement their work. Identifying how your HM program meets their goals may be a way to pique their interest and build the relationship.

- Look for organizations with a proven history of successfully serving your target population and community. Proven history means looking beyond the glossy brochures and asking other community-based providers about their experience working with and delivering services in the community. For example, one grantee noted that they have encountered a few referral partners where “their materials looked nice and everything about them looks nice,” but upon further interaction, the partner really did not possess real substantive experience working with the community.

**Tip:** Ask members of your target population because reputations travel by word of mouth and they will know who the trusted organizations are.

- Look for organizations that have an established level of trust with your target population. This means the organization is welcoming and has provided positive experiences for your target population.

**Tip:** Don't discount less established organizations. Keep the door open and look for win-win opportunities to work together. The following is a creative example. One HM program asked its existing referral partners to mentor less established organizations so that they can learn the ins and outs of organizational development. The mentor organization shared strategies on how to make referrals to outside programs, such as making referrals to the HM program.

- Look for organizations that are administratively and financially stable, as this can be an indicator of good business practices. Organized providers that have processes and procedures in place will have channels that make it easier for you to gain access to their staff and introduce your HM program or integrate your HM program into their referral system.
- Get an accurate sense of the number of referrals the organization can provide monthly or annually. This will allow you to have realistic expectations and hold your referral partner accountable. For example, one HM program found that roughly 25 percent of referrals translated into actual client enrollments into their HM program. Based on this finding, the HM program was able to work backwards to figure out the number of referrals

needed to meet their target enrollment numbers. The HM program then used this information as the basis for seeking additional referral partners so that they would generate their target enrollment numbers.

**Tip:** Think about stratifying referral sources according to the number of referrals that they are going to generate. For example, one program categorized their referral sources into tier 1 and tier 2 where tier 1 provides 75% of their referrals and tier 2 provides 25% of their referrals. Based on the productivity of referrals, this program stratified their level of effort and resources to devote to the referral partner.

- Look for organizations that are sensitive to your target population. For example, one HM program that serves ex-offenders knew that any organizations it partnered with would have to serve their clients whole heartedly without reservation or judgment.

**Tip:** If at first you don't succeed—try, try again! In developing partner organizations—as in recruiting participants into HM programs—timing is everything, and persistence is key. A partner organization may not see the value of partnering when first approached, but may eventually see how their clients could benefit from your services.

- Know that there is variation among the same types of programs. For example, not every Head Start or Healthy Start is the same, so don't limit and determine your approach to them based on past positive or negative experiences.

**For current information and strategies to help your healthy marriage program, visit the National Healthy Marriage Resource Center (NHMRC) website at [www.healthymarriageinfo.org](http://www.healthymarriageinfo.org).**