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5 Tips for Strengthening Referral Networks

Changes in funding, staffing, program policies, and service availability can leave referral information outdated or unclear. When contacts or services are hard to confirm, staff may spend more time searching for information and newcomers may wait longer for support. This tip sheet provides practical steps to help you strengthen your referral network to ensure newcomers can quickly and efficiently access the supports they need.

1. Prioritize the most important updates first

This can help focus your time on the outdated information that is most likely to affect newcomer access to services.

- **Start with high-use and time-sensitive referrals.** Review the resources staff rely on most often, especially services where delays may affect health, safety, housing, legal stability, or access to benefits.
- **Review recent referral challenges.** Ask staff which referrals have been difficult to complete because contact information was outdated, eligibility had changed, services were unavailable, or the provider did not respond.
- **Explore which available services may have recently changed.** Pay close attention to programs affected by funding shifts, staffing changes, new eligibility rules, or waitlists.

2. Prepare before you reach out

A little preparation can reduce unnecessary back-and-forth and demonstrate respect for other providers' time.

- **Specify what you need to verify.** For each prioritized program, identify the exact information that needs to be confirmed, such as whether they are accepting referrals, what services are currently available, whether eligibility requirements have changed, and whether the listed contact is still current.
- **Review what is already public**. Check the partner's website, program pages, referral forms, and staff directory before reaching out.
- **Organize program information in one place.** Use a shared spreadsheet to track contact information, services provided, populations served, service area, eligibility requirements, and language access options.
- **Document the referral pathway.** Capture what you already know about how referrals should be made, what documents are needed, whether appointments are required, expected response times, and follow-up steps. You will then be ready to update this as needed.

3. Choose how to reach out

Choose the method that fits what you intend to verify and what level of relationship-building may be needed.

- **Use email** when you have a relevant contact person and a focused request.
- **Use phone calls** when the right email address is unclear or online information may be outdated.
- **Use introductory meetings** when updates need more explanation or involve several referral pathways.
- **Use group conversations** when multiple providers need to share updates or clarify referral pathways. Regional check-in calls, such as county refugee forums, can help providers identify outdated information and update referral options across the network.

4. Craft clear and actionable messaging

When you connect with a provider or community partner, clearly explain what you need to confirm and make it easy for them to respond or reroute you.

- **Introduce yourself.** State your name, role, organization, and the community or program you support.
- **Clarify your request.** Explain the information you are trying to confirm, then ask for the specific answer, contact, referral step, or next step you need.
- **Make it easy to redirect the request.** Ask the recipient to forward your message or share the appropriate contact if needed.
- **Leave room for continued conversation.** Offer to schedule a follow-up or ask how they prefer to stay connected.

Sample Message:

Hello [Name],

My name is [Name], and I work with [Organization/Program]. We are reviewing our referral information to make sure newcomers are connected to accurate and current services. Could you please confirm whether [Program/Service] is currently accepting referrals for [Population/Service Need]? We are also hoping to confirm the best referral contact, current eligibility requirements, the service area, and any documents needed to make a referral. If you are not the right person to contact, would you be willing to forward this message or share the best contact?

Thank you for your time,
[Name]

5. Keep referral information current

Updating a referral network is not a one-time task. Build simple routines that help staff maintain accurate information over time.

- **Assign ownership.** Identify who is responsible for updating the referral list, reviewing staff feedback, and following up with partners when information changes.
- **Set review dates.** Add a "last verified" date and a "next review" date so staff know when information may need to be checked again.
- **Create a feedback loop.** Encourage staff to flag outdated contact information, failed referrals, long response times, or changes in service availability.
- **Use patterns to guide partnership development.** When the same gap appears repeatedly, consider whether libraries, schools, workforce programs, local employers, or other community-based organizations could help address unmet needs or strengthen referral pathways.

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