

Developing a referrals network

Recognize the limits of your skills and expertise when supporting your clients. In some cases, your role as a coach may be to connect your client with trusted, specialized financial empowerment resources. This can include drawing on your local referrals network.

Your referrals network is your list of individuals, organizations, or service agencies who can offer specialized support which you do not offer. It can also include others in your own agency who have skills and knowledge in some areas that you personally do not. These should be people who you trust to provide accurate, non-judgemental information and service. In developing your referrals network, consider:

1 What knowledge areas do your clients need?

Who can offer support for these needs, such as:

- tax filing and access to benefits
- debt or credit counselling
- accessing housing
- accessing employment counselling
- other?

2 Who exists in your community services already?

- Match the needs list with staff you know, and have contact info ready when it is needed. This could include local government offices, neighbouring agency departments, community organizations.

3 Brainstorm!

- Who else do you need?
- Who else would have ideas on where to go?

4 When you find a new or previously unknown referral source, make sure they are a trusted and reliable resource for your clients.

- Get and check references; meet with potential referral partners
- Ensure the information they offer is unbiased
- Identify key contact person(s) who agree to be a referral source and understand why it is important for your clients
- Is there a fee for the service? Any potential risks?
- Remember: Your clients **TRUST** your recommendations!

5 Keep your list updated.

- Add and edit as needed
- Always be aware of client needs



Connect and share

Do you already have an active referrals network? Make sure to connect with others in your agency and share information, including both frontline staff and managers. This work may already have been done or begun by someone else!

Building the conversation

“It sounds like you’re ready to start tackling your debt. We have a debt management workshop coming up down the hall at ABC services, would you like to attend? Let’s get you that information before we get into the rest of today’s session.”