rootCAUSE

Referrals and Partnership Management

A core component of the Program Quality Roadmap

November 10, 2021

Webinar Logistics

- **Share your name, pronouns, organization, and city in the chat.**
- Use the chat if you are experiencing any tech issues.
- Share thoughts and comments about the discussion!

- **Type questions** in the the Q&A during the webinar.
- **Raise your hand** during the Q&A sessions to ask your question out loud to the group.
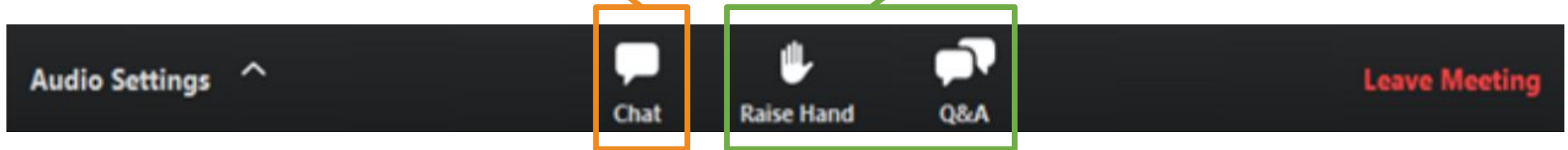
Panelists

Leandra Vernon
Fetal Infant Mortality
Review Coordinator,
Every Baby Guilford

Jean Workman
Executive Director,
Every Baby Guilford

Elbia Altamirez
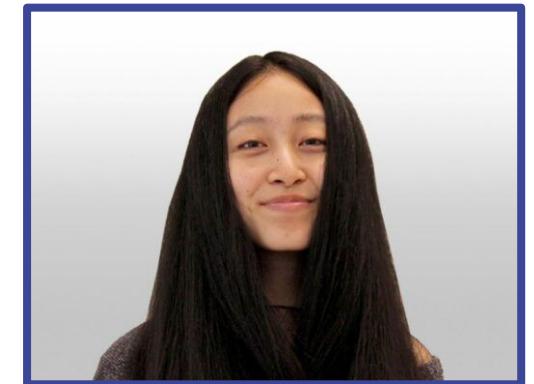Community Health
Educator, Every Baby
Guilford

~ Today's Moderators ~

Consuela Greene
Principal Consultant, Root Cause

Abby Fung
Managing Director,
Root Cause

Yifan Kong
Manager, Root Cause

Program Quality Roadmap

FOUNDATIONAL CONDITIONS:

- Organizational Mission & Vision are driven by an authentic understanding of community needs and strengths.

- Organizational Commitment to Racial & Economic Equity.

- Alignment between Organizational Mission & Vision and Program Outcomes.

- Organizational & Leadership Supports supply tangible and intangible resources.

Racial & Economic Equity

In the context of social services:

Racial equity is the condition achieved when a person's racial identity does not predict, in a statistical sense, their ability to access and benefit from quality services or the outcomes of these services.

Economic equity is the condition achieved when a person's income and/or wealth does not predict their ability to access and benefit from quality services* or the outcomes of these services.

Quality services include free, sliding scale, and fee-based services

Overview of Referrals & Partnership Management

Key Points for Partnership Management

Partnerships are the relationships among providers that rely on one another to deliver services to their clients, address specific challenges, and/or work towards common goals.

Informal — *Short-term or Long-term* — **Formal**
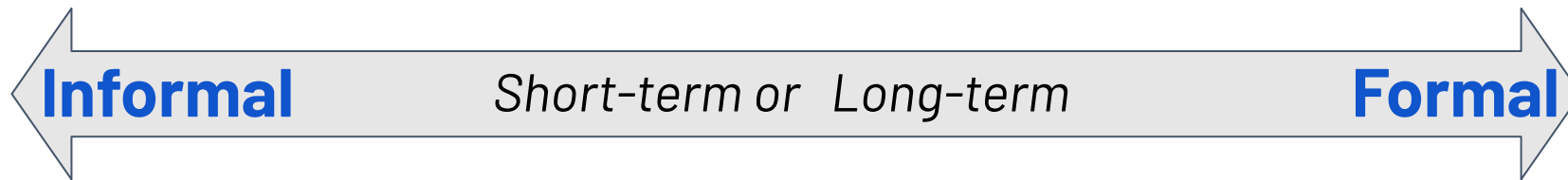
Once you've identified your partner(s):
- What are the expectations of the partnership?
- Determine a clear and common purpose with desired goals/outcomes
- Establish roles & responsibilities with shared accountability
- Establishing a formal written partnership agreement can support partnership management [review periodically, revise when necessary

Key Points for Referrals

Referrals are partnerships (ranging from loose to formal) with processes by which one organization connects a client to another organization to help the client receive services to address their needs. The referral can happen through direct organization contact, or through a referral the referring organization provides the client without engaging the receiving organization directly.

Some Best Practices
- Referral systems and services need to be accessible to staff and service participants
- Use clear and agreed-upon referral tools and processes with feedback loops
- Maintain up-to-date resource directories
- Understand the service landscape in your community
- Collect and analyze referral metrics

How to Put Partnership Mgmt Best Practices Into Action
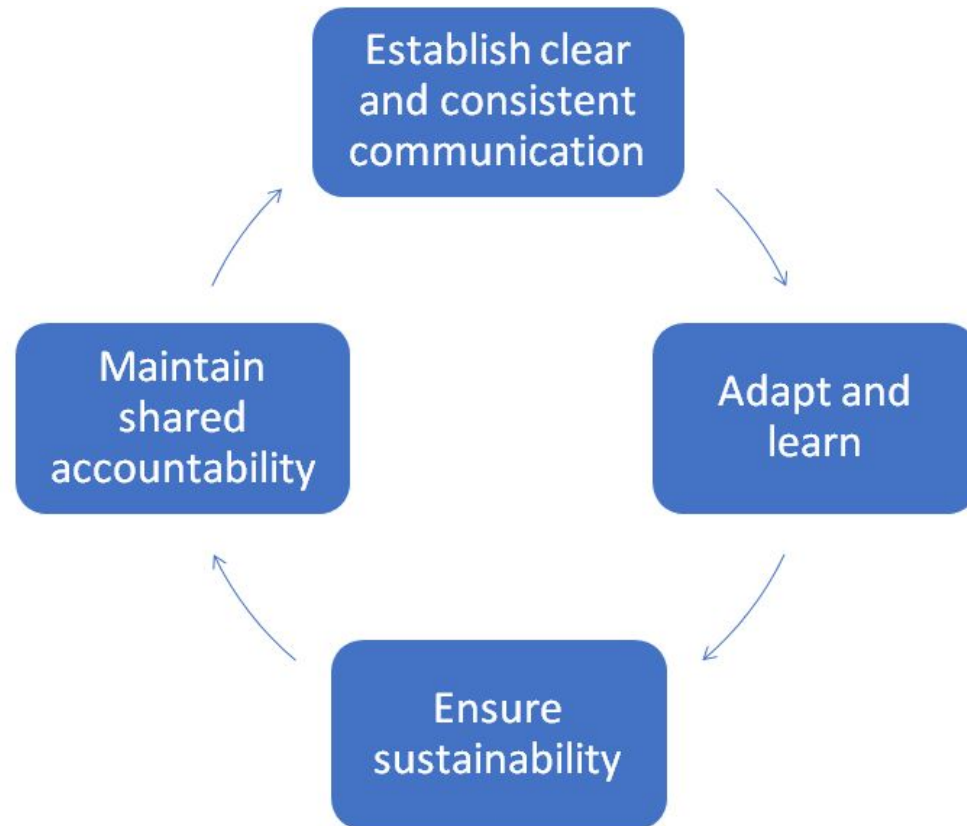
- In the same way you have to keep watering your plants, you have to keep nurturing your partnership after you launch it...

Establish clear and consistent communication
  - Have a regular schedule of check-ins

Adapt and learn with partners
  - Collect data so partners can discuss "wins" and opportunity areas
  - Make needed adaptations
  - Share results with partners and beyond

Ensure the sustainability of the partnership
  - Partners must commit staff, money, time, and organizational and leadership buy-in

- *Maintain shared accountability for partnership responsibilities*

Panel Discussion

Thank you for joining us!

1. An email will be sent to registrants in the upcoming week with links to the **recording**, **slides**, and the **Referrals and Partnerships Research Brief**

2. Go to https://rootcause.org/program-quality-learning-series/ to register for upcoming sessions:

    ○ Wednesday, November 10, 11am-12pm: **Program Accessibility**

    ○ Tuesday, November 16, 10am-11am: **Family and Community Engagement**

    ○ Tuesday, November 17, 9:30am-1030am: **Data and Measurement Capacity**

    ○ Wednesday, November 17, 11am-12pm: **Staff Support & Performance**

3. Connect with **Root Cause** at rootcause.org/contact-us

4. Connect with our Moderator:

    ○ **Consuela Greene** (cgreene@rootcause.org)

    ○ **Yifan Kong** (ykong@rootcause.org)

Extra Slides - can take out

How to Find Partners
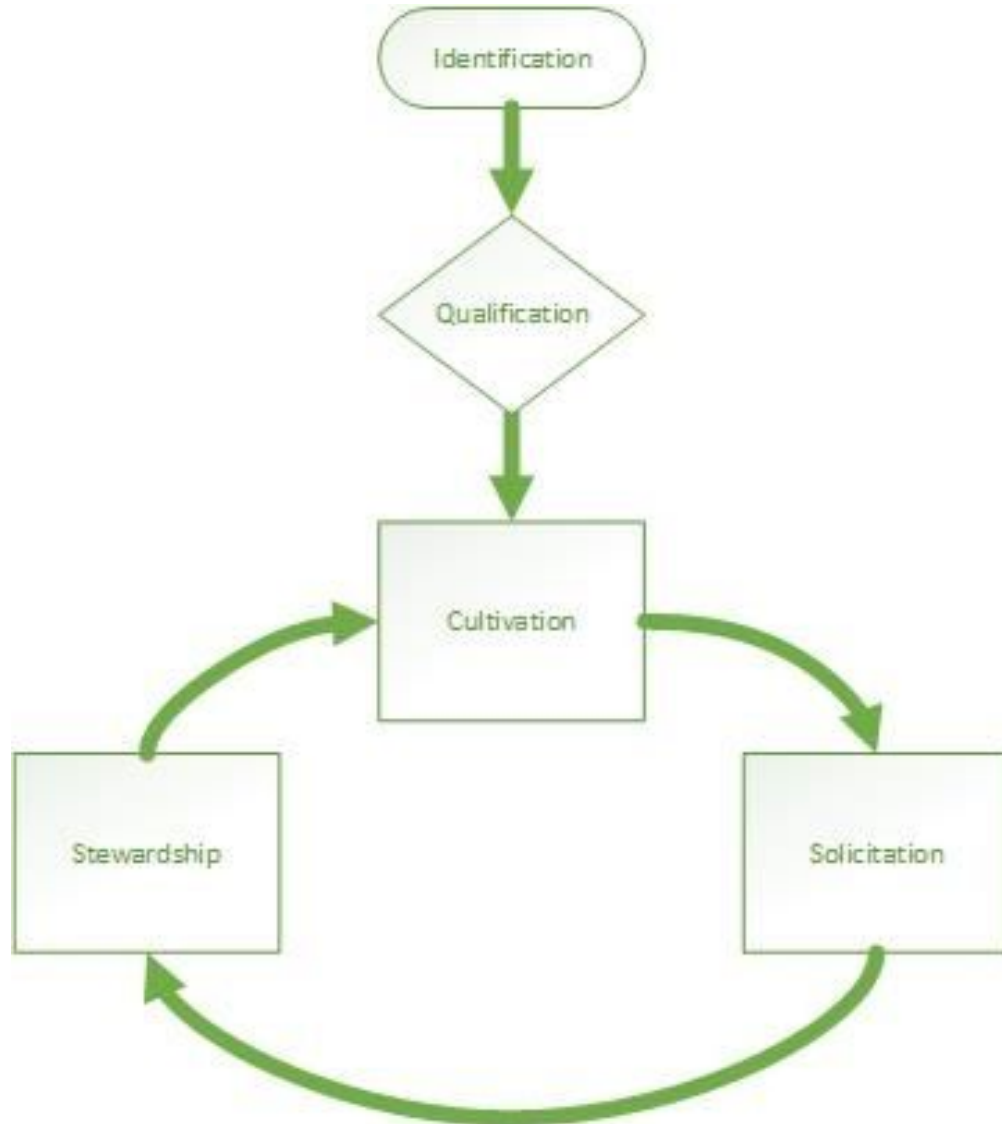
Partnerships can happen very organically.....but if you're a planner like we are, or are having problems finding partners, you can also make a game plan.....

1. <u>Identify</u> prospective partners
2. <u>Qualify</u> partners by assessing them against your partnership criteria
3. <u>Cultivate</u> relationships
4. <u>Solicit</u> - make the ask
5. <u>Establish</u> the partnership

Continue to Cultivate Prospective New Partners
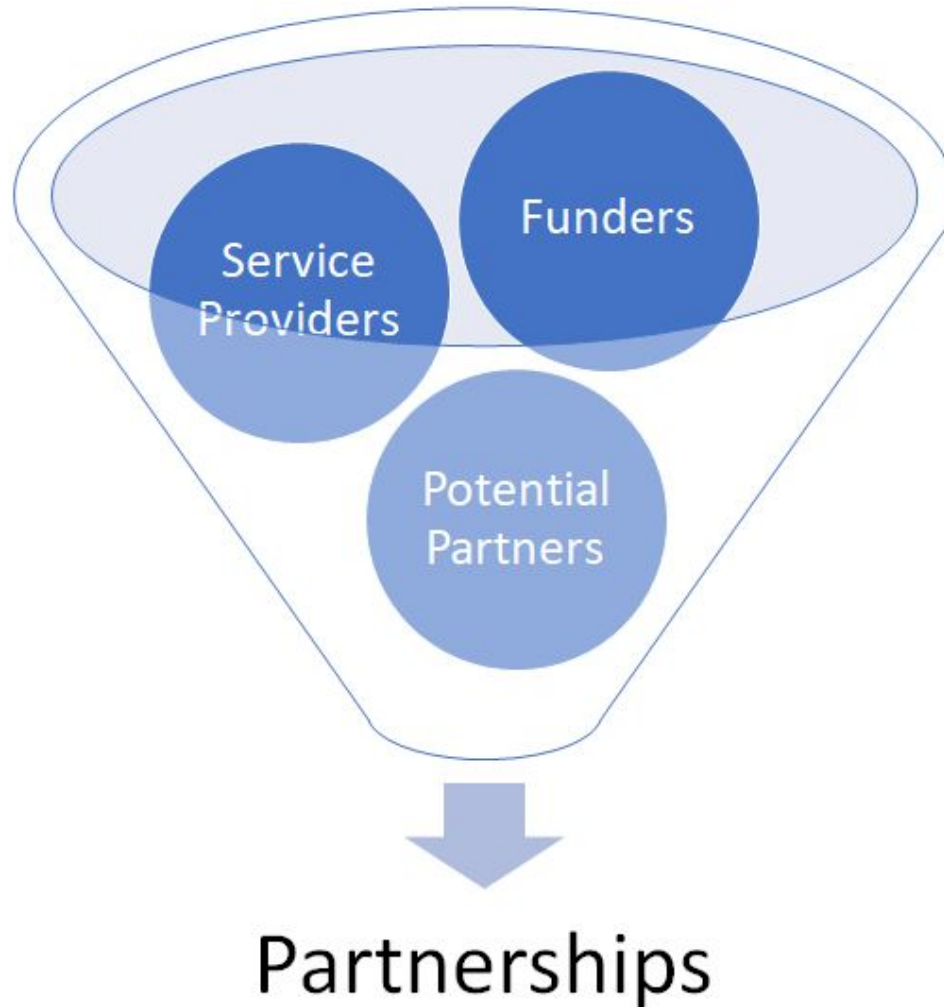
- Prioritize current partners but continue to identify and cultivate prospective partners
- Develop a relationship pool, or funnel, and keeping adding people to it
- Ways to do this include: Share expertise, join professional groups for your issue area or sector, help others with problems in one-off opportunities, speak at a conference, etc.