

Ongoing Use

Worksheet 2

In order for the Robust Referral System to be most helpful, you will need a plan for how you will use it and keep it up to date. This worksheet is designed to assist you with that plan.

Who within your congregation will be authorized to make referrals? What type of referrals will they be authorized to make (i.e. agencies like shelters and food pantries, system needs like transportation and legal assistance, mental health, group support)? Remember, these persons will need to be trained on the referral-making process and will need clarity around their responsibility for follow up. For example, follow-up may be a phone call after 2-4 weeks to confirm that the individual has been able to connect to the referred provider and to offer assistance in overcoming barriers, if any. Alternatively, the person might be responsible for notifying the pastor of the referral made for follow-up by the pastor.

Name/Role

Type of Referral

_____	_____
_____	_____
_____	_____
_____	_____

What time of year will you review the list to make updates? _____

Who will be responsible for reviewing and updating the list? Updating the list includes confirming that all referral sources listed still exist and that their contact information is up-to-date. It also includes adding any referral sources discovered in the past year and considering whether there are new needs identified for congregants and, if so, finding and adding those referral sources.

_____	_____
_____	_____
_____	_____

Reach out to the people listed above to set a meeting date. You might create a calendar invite, setting multiple reminders leading up to that meeting.

Resources provided in the PowerPoint slides of Video 2:

[NC Crisis Resources](#)

[SC Mental Health State Resources](#)

[SC Mobile Crisis Response](#)