

Establishing and Providing Effective Referrals for Family Planning Clients



How to Use This Guide	This guide is designed to support facilitation of an interactive discussion about Establishing and Providing Effective Referrals for Family Planning Clients . This discussion guide is part of the Establishing and Providing Effective Referrals for Family Planning Clients Toolkit . Facilitators should feel free to adapt and revise this guide.
Learning Objectives	By the end of the discussion, participants should be able to: <ul style="list-style-type: none"> » Describe the Title X Program Requirements related to providing referrals » Explain at least two reasons providing effective referrals is critical to quality care » List at least three strategies for creating systems to provide high-quality referrals
Length	At least 60 minutes , with more time for discussion as schedules allow.
Materials	<ul style="list-style-type: none"> » PowerPoint Slides with Notes: Slides with speaker notes, activities, and discussion questions » Referral Quality Staff Observation Activity (Be a STAR), Instructions, and Handouts » Establishing and Providing Effective Referrals for Family Planning Clients Toolkit: A guide to support provision of referrals in family planning service sites
Format	This discussion is designed to be conducted in person (or slides 1–16 can be done by webinar) .
Suggested Participants	Staff from one or more family planning clinics. Involving multiple sites can facilitate peer-to-peer sharing. Having representation from clinical, administrative, and financial staff can help address system issues.
Before You Start...	Facilitators should review and be familiar with the tools and resources outlined in the Establishing and Providing Effective Referrals for Family Planning Clients Toolkit .



For related tools and tips, see [Establishing and Providing Effective Referrals for Family Planning Clients Toolkit](#)



Establishing and Providing Effective Referrals for Family Planning Clients



Establishing and Providing Effective Referrals for Family Planning Clients



5 minutes



Slides 1-2



Present Slide

Facilitate

1 Establishing and providing effective referrals for family planning clients

Activity:

- » Conduct participant and facilitator introductions.

2 Learning objectives

Title X Program Requirements for Referrals



10 minutes



Slides 3-5



Present Slide

Facilitate

3 Family planning is entry point to health care

4 Title X Program Requirements

5 Other health & social services providers

Discussion:

- » Are there any other agencies you frequently refer clients to?
- » What agencies refer to you for family planning services?

Title X Program Requirements for Referrals



10 minutes



Slides 6-10



Present Slide

Facilitate

6 Establishing and providing effective referrals toolkit

7 Written policies

8 Relationships with other service providers

9 Local resource list

10 Referral agreements

Establishing and Providing Effective Referrals for Family Planning Clients



Providing Supportive & Effective Referrals



10 minutes



Slides 11-18



Present Slide

Facilitate

11

Referral types

12

Provide supportive referrals

13

Provide referrals proactively

14

Document and develop systems support

15

Sample referral form

16

Close the loop

17

Track referrals

18

Apply principles of quality improvement

Discussion:

- » What are we trying to accomplish? What is our goal?
- » How will we know (i.e., measure) that a change is an improvement?
- » What changes will lead to improvement?

Establishing and Providing Effective Referrals for Family Planning Clients



Referral Peer Observation Activity

○ 20 minutes  Slides 19-21

 Present Slide

Facilitate

19 STAR model for referral quality

20 Peer observation activities

Activity:

- » Participants pair off.
- » Use Handout 1 as a reminder of the STAR components.
- » Use Handout 2 to select and act out one or more scenarios. One participant plays the role of the client, one plays the referral-maker, and other participants are observers/mentors.
- » Role-play; ask partners to give each other feedback.

Discussion:

- » What went well? Not so well?
- » Was every aspect of the STAR model considered?

Second Activity:

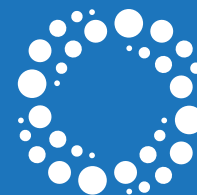
- » Before asking all participants to reflect even more on using the STAR model (next slide), seek one pair of volunteers to role-play another scenario from Handout 2 for the larger group (a “fishbowl” activity).

21 Reflection

Activity:

- » Get feedback on the role play from the larger group.
- » Was the referral-maker in the scenario:
 - ✓ **Supportive?** Compassionate? Non-judgmental?
 - » In what ways?
 - ✓ **Thorough?** Complete?
 - » Did the referral-maker gather and share all of the information needed for an effective referral?
 - » Was the referral-maker knowledgeable about the services the client was seeking?
 - ✓ **Active?** Was this a “warm” or “cold” handoff?
 - » Did the referral-maker do enough to locate and schedule the care the client needed?
 - » Did the referral-maker address all of the potential barriers the client might face, keeping her/him from utilizing the referral?
 - ✓ **Referral quality?** Was there anything that could be improved?
 - » Was there anything missing?
 - » Did the client seem satisfied? Would you be if you were the client?
 - » What could have been done or said differently?

Establishing and Providing Effective Referrals for Family Planning Clients



Conclusion



5 minutes



Slide 22



Present Slide

Facilitate

22 Thank you!

Discussion:

- » For these resources and others, go to FPNTC.org.
- » Questions?