



## Using Referral Sources

**Working in collaboration with existing community services is vital to the case management system. A major principle of this model is a good referral system.**

- Share resources and lessons learned between staff. There is no reason to reinvent the wheel when using outside services.
- Integrate your program into the community to widen the availability of resources.
- Invite community representatives from various referral agencies in your area for community meetings.
- Send literature about your program to referral sites.
- Get to know the contacts at the various referral agencies.
- Integrate resource sharing into the programmatic design at your site (In-house resource log, community rolodex or database with important numbers and contact persons, tenant and staff input on the quality of services offered by referral agencies.
- Be mindful that sharing of confidential information between your site and the referral site should be done only when a consent form has been signed by the tenant. Be sure to have releases (consents) signed by tenant for active and consistent communication between case management and referral site.
- Be sure to document all salient information received or given to referral agency.

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Note: This document is included within the *Supportive Services* section of CSH's *Toolkit for Developing and Operating Supportive Housing*, which is available at [www.csh.org/toolkit2](http://www.csh.org/toolkit2). This document has been adapted from the HUD-funded curriculum *Case Management Services*, which is available at [www.csh.org/training](http://www.csh.org/training).