

## Making a Referral

*Referrals can be made in many ways, ranging from verbally talking to someone about seeking help, to casually distributing a pamphlet of related information. It is very important to be sensitive to the timing of the referral and the interaction between you and the student being referred, especially if the nature of the referral is of a sensitive nature.*

### When to Make a Referral

- Refer out of a desire to help, not out of a need to pass the problem along. In other words, a referral is a *transfer of trust*
- When students present problems or requests for information which are beyond your level of competence
- If a problem is personal, and you know the student outside of a professional relationship (relative, close friend, etc)
- When you feel that personality differences (which cannot be resolved) between you and the student will interfere with effective progress
- If the student is reluctant to discuss the problem with you for some reason. If, after a period of time, you do not believe your communication with the student has been effective.
- As a general rule, "When in doubt, refer." Do not wait until it is too late for anyone to help or assist the student.

### How Do I Make a Referral?

1. *Be approachable.* If you set a friendly tone, people will generally respond in kind.
2. *If you're sure the student will accept a direct referral,* give them the name of the referral source and tell them how to make the contact, and what to expect. Always make sure the student knows what to expect when they are being referred.
3. *Look out for the "Red Tape Shuffle!"* Watch out for students who are getting the run around. If a student is confused or being sent from office to office, be a part of the solution and find someone who will help. If you don't have the information, or a person's name to refer to, try to get it. Never refer the inquiry to another place or number unless you are sure that place or number has the information. If you are not sure about the information or the source, make the call yourself and then pass on the answer and the source to the student.
4. *Refer the student to a specific person* (wherever appropriate) rather than to a department in general. Familiarity with the personnel and functions of each department will help you accurately direct the student to the right person or place.

5. *Be creative.* Explore possibilities with the person. Never be satisfied with a dead end. Always explore alternatives.
6. *Respect personal information.* Sometimes students will tell you about their difficulty. When you call another source to find out information, don't tell the source anything about the student without his/her permission. At times, you will have to report what you have heard to your supervisor but be careful to report vertically and not horizontally.
7. *Show your interest.* If you happen to see a student to whom you have given help, ask in a general way if the information you gave was helpful. Sometimes it is nice to know that you did help the person and it also lets the students know that you are concerned.
8. *Be tolerant.* Sometimes students will ask questions which seem fairly straightforward or simple. Don't assume that a student knows how to find everything on campus (especially a new student, but even upper-semester students). Experience differs from student to student.
9. *Learn to ask questions.* Ask questions of the student. Make sure that you (and s/he) know what they are looking for. Sometimes people are looking for one thing but they ask for another or ask for it by a different name. Don't be afraid to be persistent to find out what their question really is.
10. *Don't send a student away without them know why they are going to the place you're sending them.* If they don't know why before they leave your office, they won't know why when they get there. Check with them to make sure they understand why you're referring them to a specific service/office/departement.
11. *If the person seems slightly hesitant,* you can either explore the hesitancy with them and help them find a way to cope with it; or you can suggest that you set up the contact and have them contact the student.
12. *If the person is very hesitant,* you can suggest that you set up a meeting/appointment and both go together. Be sure that this is ok with the person you are referring the student to.
13. *If the person refuses to be referred,* you can explain your limitations and see if they still want to work with you knowing your limitations, or confront them with your limitations and refuse to work with them if necessary. The latter problem happens very seldom, but can be a problem to the helper.

## Things to Remember...

- You are a referral agent
- Your knowledge of available resources is your greatest asset in referral. The more you know about the purpose and function of various helping agents, the more effective you will be in helping students develop action plans for using these various resources to complete their goals
- A good referral is a measure of your competency, not your inadequacy