



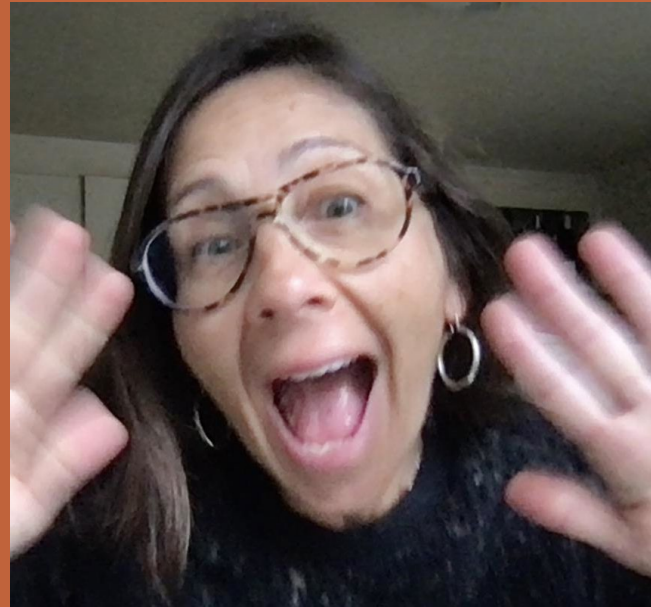
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NEIGHBORHOOD

The Heart of the Referral

Staff relationships and the successful referral



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Michelle Reiss - Top
Associate Director of Data & Learning
Data & Evaluation Team
MEDA



Our Lead Agency



Mission Economic Development Agency

Rooted in the Mission and focused on San Francisco, MEDA's mission is to strengthen low- and moderate-income Latino families by promoting economic equity and social justice through asset building and community development.

Founded in 1973 in the Mission

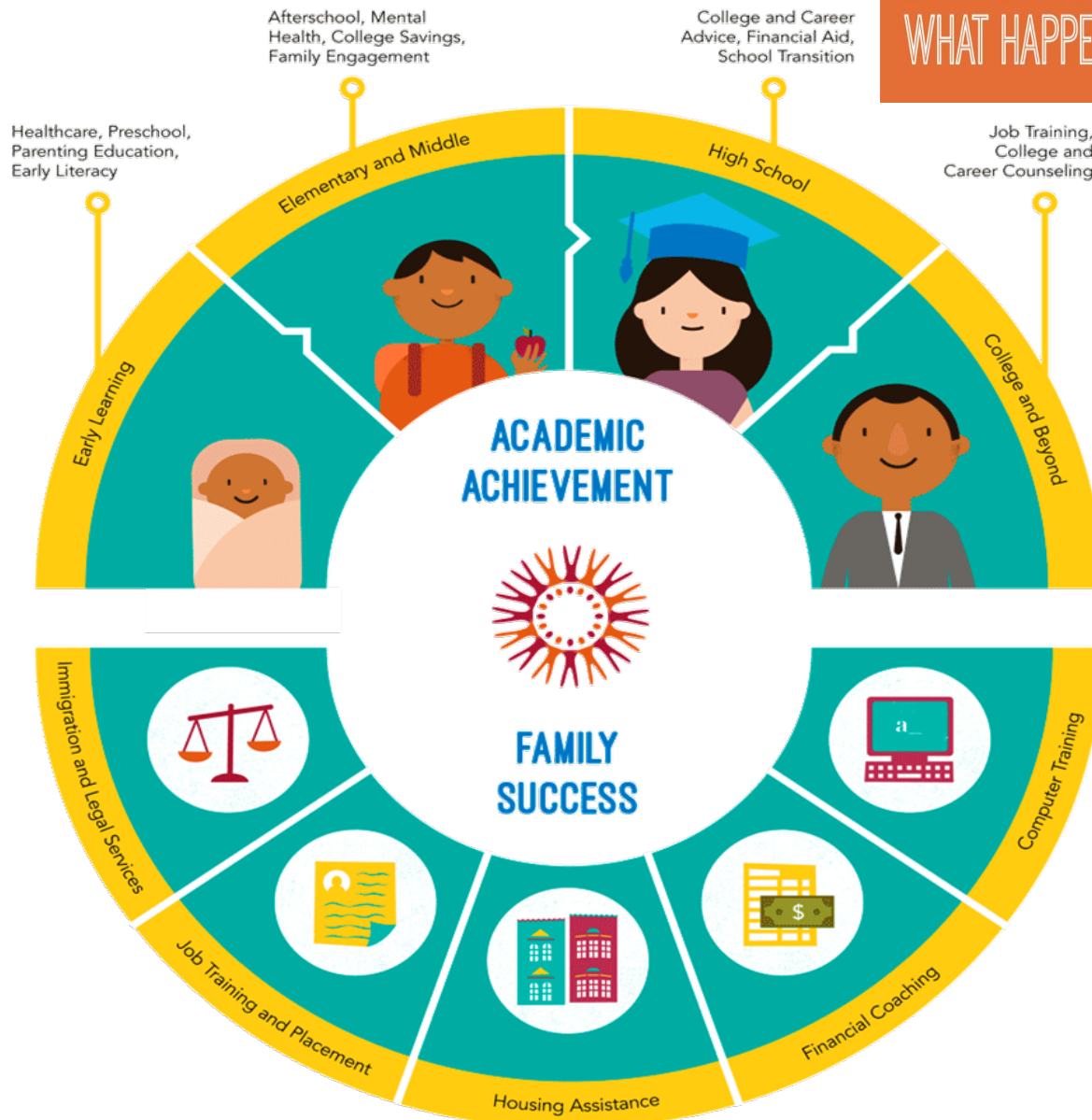


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MISSION PROMISE NEIGHBORHOOD



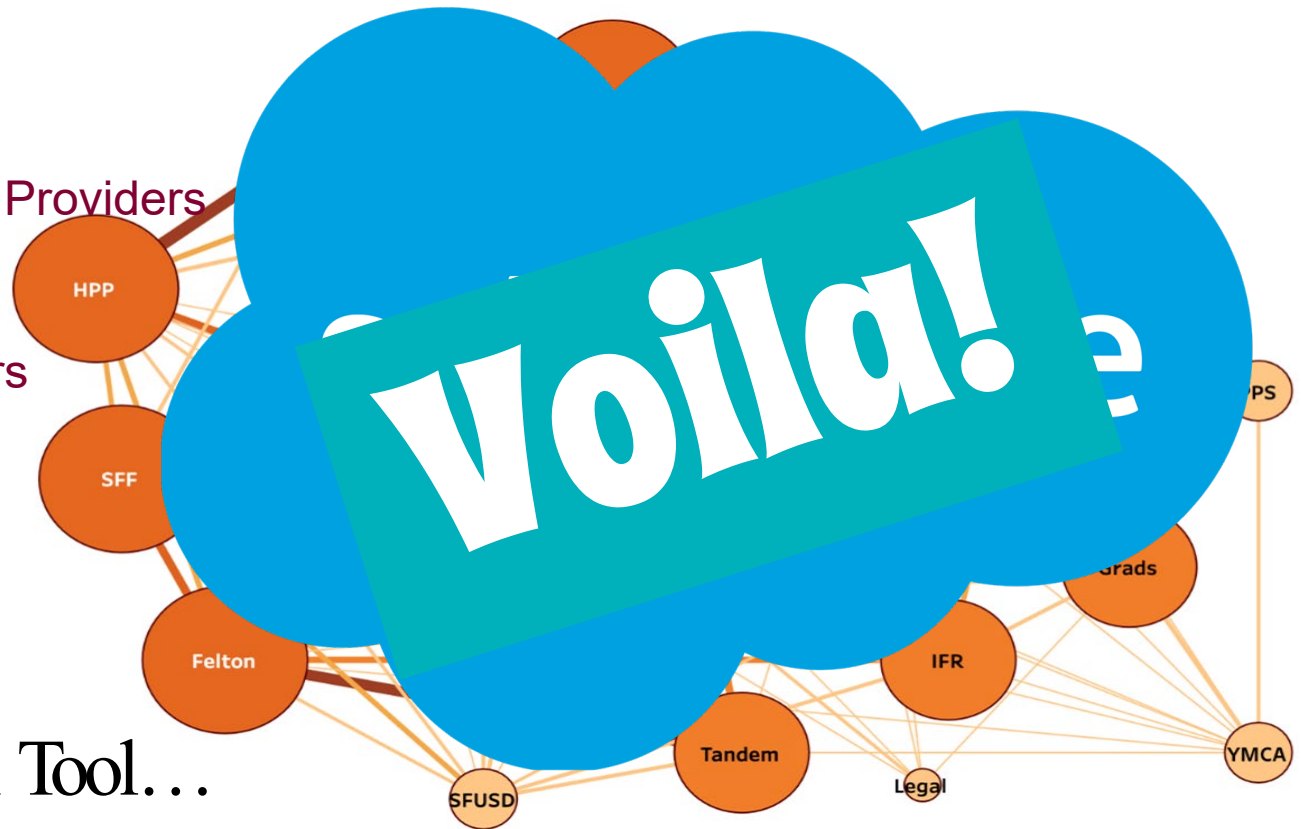
EDUCATION IS ABOUT MORE THAN
WHAT HAPPENS IN THE CLASSROOM.



Original Concept for Referrals

MPN is:

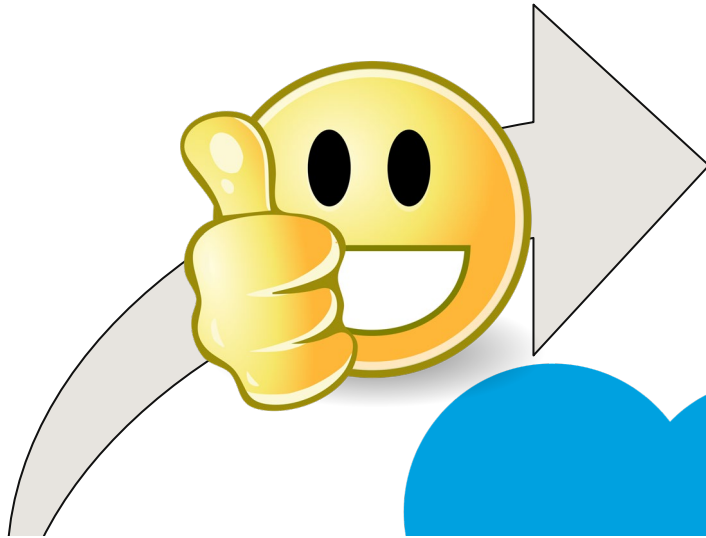
- 9 Schools in SFUSD
- 3 Early Care Centers
- 20 Family Child Care Providers
- 15 CBOs
- City Departments
- 10 Service Connectors



Build a Referral Tool...

And Everyone would be an expert referral maker!

The Technical Solution



Referral Age 7.0

Record updated by Staff on the "other end"

Referral Open Date	12/10/2020	
Referral Status	Closed - Successful	
Result	Successful_Registered	
Closed Date	12/17/2020	

SEARCH NEED: Refer "To" Program

SEARCH NEED: Refer "To" Program

SEARCH NEED: Refer "To" Program

business assistance

Programs (MP)
5 Results · Sorted by Relevance ▾

PROGRAM NAM
Small Business
Business Devel
Fondo Adelante
BayLegal Free L

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A new referral has been created for the following program.

Business Development
Pending - New
[OutboundReferral-10062](#)
[\(Mission Promise Login for Partners\)](#)

Dulce Fake
Mobile: (415) 555-5555
Home:
Preferred language: Indigena language

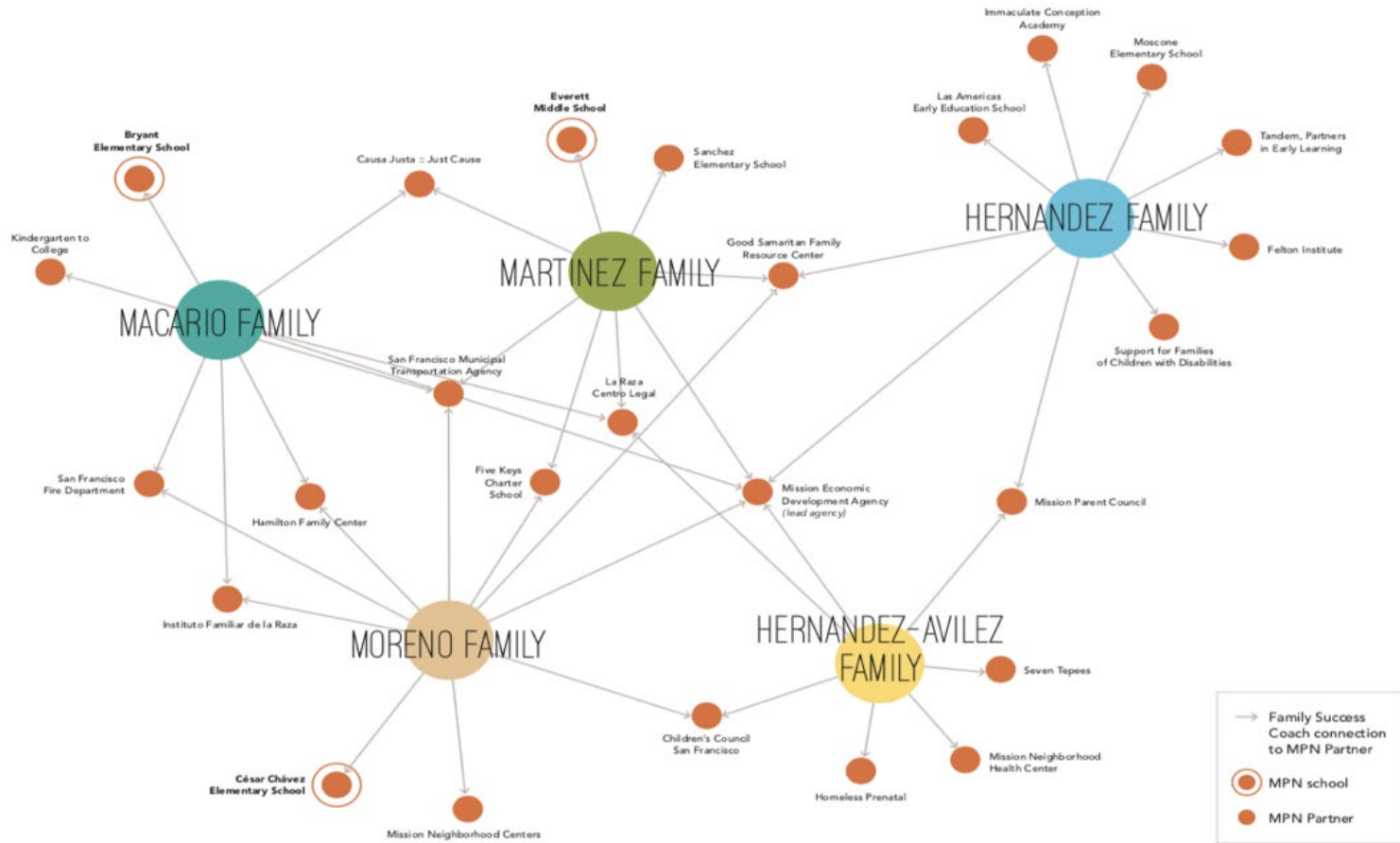
Email Alert Sent to Program Staff

Owner BDP Referral Queue

Created By Dulce Lomeli, 12/10/2020 1:20 PM

Last Modified By Luis Quiroz, 4/6/2021 4:08 PM

Organic Reality: FSC's As Hub



Human Centered Design team assembled to figure it out!



A variety of staff and roles from around the partnership aimed to find the root of the problem

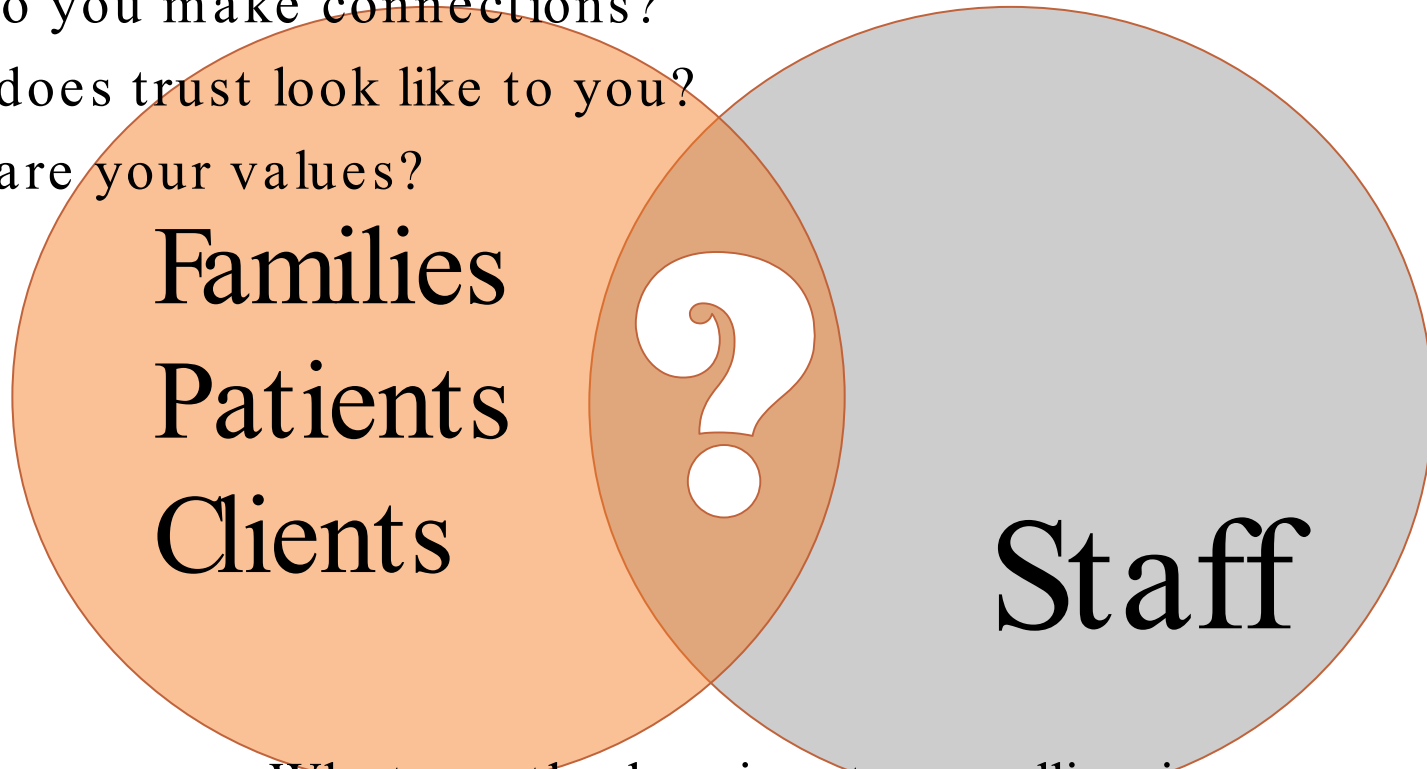


Interviewed Both Families & Staff

How do you make connections?

What does trust look like to you?

What are your values?



What are the barriers to enrolling in your program?
What do you do when you see a problem you can't help with?

The Student Becomes the Teacher

What we learned about how clients share information with each other made us jealous

“If families are creating personal connections on their own - why aren't we?”

-Design Team Staff

Decided to focus on Staff
Staff are the gatekeepers to the clients

So What Broke?

We assumed A LOT. Like ...

Job descriptions people didn't have

Like talking to people about problems outside their domain

Computer access people didn't have

After-school staff running around playgrounds

Time people didn't have

Intake staff juggling phones, rocking babies, translating forms all at once

And the warm handoff is a very big deal

Technology doesn't create trust It can only reflect if you've built it

"I don't know anyone there myself. I can't risk sending one of my families there."

Staff mistrust that no one was going to be there on the other end of the referral was the biggest barrier

"I don't trust the information about the service is up to date."

They had been burned too many times in the past and no digital database was going to change that. Even though our tech solved for this, several other barriers were in the way of them ever using it.

At RISK: The reputation and relationships with the parents, students, patients, clients they work so hard to build.

Ah-hah!

The problem
at the root

Recommendations

Staff Networking – Create trust and relationship building across staff who will refer to each other through **in-person** events. Supplement with a **digital** communication channel for staff to connect.

The FSC Connector model – The skill set of “Connector” is a specialty and is not transactional. Create the position or find one to lean on.

Find your “Love Connection” Referral Programs – No one can be the expert on every other program. Identify the top priorities everyone can focus on. For us it was **Mental Health and Housing**

Formula for 1st Visit Success – 3 easy tips to make the first visit as successful as possible. This builds confidence for both staff and families;
1. We offer..., 2. Be sure to bring ...3. Don't worry if...



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**Your solution will be
unique
to your community**
But here's a peek at ours...

The people at the center will reveal the solution

“I don’t use Salesforce to start a referral.


Oh - and I only enter it into Salesforce later if I have time.”

Insight: The digital tool does not match their skill set or their environment

 **Idea:** Salesforce is used at the end. Use it as a platform for more than record keeping

“I know someone there so I call them first.”

Insight: I’m limiting the referrals I can make to who I personally know

 **Idea:** Create ways to connect with more programs so relationships aren’t silo’d

“I will only make a referral after I get a commitment from someone there, that they will personally help my client.”

Insight: Warm handoff, Trust, Trust, Trust. It doesn’t start with a machine - it ends there

 **Idea:** Build a system to connect professionals, **not** clients to a stranger they don’t know

Full MPN Referral Redesign Solution

RAISE TOP-DOWN SUPPORT

- MPN communicates the benefits of having direct service staff participate in MPN Network activities to partner organization.
- Partner organization communicate and create time for direct service staff to attend meet ups and lead activities to empower more connection to services.
- MPN routinely share research on burnout in the field, ways to prevent it, and the cost of outcome and resource.



DIRECT SERVICE STAFF MEET UPS



- Meet-up's will be focused on providing staff with:
1) Staff Mental Wellbeing 2) Professional Learning 3) Fun!!
- Meet-up's will allow for relationship building, new individual working relationships and a place for staff to talk about the challenges and rewards of their work.
- MPN will initiate meet ups but the group who attends will continue to further define how the meet ups happen and drive the content themselves.

FRIENDLY ORGANIZATION VIDEO

- Partner staff will create a low budget and easily editable video to share with clients- i.e. what their building looks like, how to navigate service, address misconceptions and how to make visit successful.
- Video will lessen clients apprehension to attain services due to cultural and physical barriers. It may also reduce staff personally escorting client to partner's organization site.
- MPN will provide a video guidelines and will help brainstorm ways to showcase partner videos.



WHAT'S APP MPN NETWORK GROUP



- Using app among the MPN Network will allow for easy communication among staff at different agencies to answer questions and feeling confident about referring their client.
- This digital group is a way for those who have the hardest time attending the meet-ups to personally engage with other staff who could help them support clients.

PROTOTYPE: Program Video Storyboard



Designed for Families
Loved by the staff who refer them!

The Video Formula

1. Exterior Shot - Help me see where I'm going
2. Friendly face of reception/intake
3. Friendly faces of staff you might work with
4. Keys to Successful 1st Visit (We offer.., Be sure to bring.., Don't worry if..)
5. Client testimony (a few sentences)
6. All in native language

As for Technology

Guess what?

They still want it!



As a platform for connecting with each other in a warm, welcoming way



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Thank you!

missionpromise.org

medasf.org