REFERRAL ROUNDTABLE PROJECT: IMPROVING REFERRALS FOR CLIENT SUCCESS

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Project Background

In the 2024/2025 fiscal year, Simcoe Muskoka Skillforce (SM Skillforce) undertook a project to enhance the client referral landscape amongst literacy and employment service providers to ensure a more supportive experience for the client that seeks to improve their outcomes and set them up for success. Four community roundtable events were held to discuss the current process for referrals, where there were barriers and challenges to consider, and how referrals across the network could be improved. The results were successively summarized and shared back to participants at each roundtable to build on the learnings and discussions of the previous session. Outcomes of the project included the identification of existing tools and development of a new tool to support client referrals, as well as enhanced connectivity and understanding between service providers.

The following report summarizes the project methodology, findings, and outcomes, as well as proposes recommendations for the next steps of the project.

Methodology

This section details the steps that were undertaken as part of the referral roundtable project, including the four referral roundtable events and consultation with end users.

The first referral roundtable event was held in Orillia, Ontario on June 26, 2024, with 50 attendees and provided a platform to investigate the current referral environment and identify key opportunities to enhance the referral process. The identified opportunities were prioritized after the meeting, via SurveyMonkey poll, and top priorities identified for further discussion at the second roundtable session.

The first event identified the importance of ensuring any solutions were developed with the clients in mind and as a result, consultations were also conducted with 15 clients of both literacy and basic skill service providers and employment service providers over the summer and fall of 2024 to inform the second roundtable session. Discussions focused on client experiences with referrals and the challenges and successes they had experienced, as well as what would make it easier for them to leverage referrals. Results were summarized and shared with attendees at the second referral roundtable.

The second referral roundtable event was held in Bracebridge, Ontario on November 13, 2024, with 46 attendees and provided an opportunity to dig deeper into the top four priorities that were identified from the first roundtable session. Discussion included how best to implement solutions to the priorities identified and how to measure success.

The final referral roundtable events were focused on informing front line staff and encouraging regional connections, and as a result two separate events were held. A Simcoe County event was held on February 18, 2025, with 21 attendees, despite inclement weather, and a Muskoka event was held on February 25, 2025, in Huntsville with 15 attendees. These events introduced frontline staff attendees to the goals of the roundtables and current tools available to support client referrals. It also provided a platform to collect feedback on what frontline staff would like to learn or do more of from a professional development perspective at future events.

After each event, the feedback and insights collected were analyzed, shared back with attendees, and used to identify and move forward key outcomes.

Participants at the three events included a cross-section of community service organizations (i.e. Community Living, Welcome Centre, etc.), literacy and basic skills providers, Employment Ontario providers, Ontario Works, and local and provincial government partners. Networking and facilitating connections were a priority at each of the events, and time was set aside on the agenda to enable conversation and new connections via speed networking. Feedback about the networking opportunity was overwhelmingly positive.

What We Heard

The following section provides an overview of the discussion and feedback collected throughout the project.

Clients

Discussions with clients identified the following themes to consider in support of enhancing the referral landscape in the Simcoe Muskoka area:

Information Access: Clients primarily learned about community support agencies through Google searches, word-of-mouth, Info Orillia, libraries, social media, and agency referrals. Suggestions for improving access included advertising in newspapers, on bus shelters, and via radio. Respondents emphasized the need for a centralized resource to find all the relevant information about an organization. Clients want to confidently navigate community supports on their own.

Barriers to Access: Clients indicated they faced challenges such as social discomfort (shyness, embarrassment), financial constraints, anxiety, transportation difficulties, lack of information, and mental health concerns that prevent them from learning more about or requesting assistance to help accomplish their goals. In order to counter this, they recommended several solutions including

- Mass email campaigns and bulletin boards in affordable housing complexes.
- Direct referral calls made by agencies.
- Improved inter-agency awareness and coordination.

Most Valued Supports: Mental health services, résumé assistance, food banks, transportation subsidies, internet access, and knowledgeable service providers were cited as the most helpful supports. Clients indicated they felt respected and supported, which they appreciated about regional service providers.

Desired Services: Clients expressed a need for increased access to furniture, mobility support, job trials, and clearer transit navigation.

Service Awareness & Outreach: Clients recommended expanding outreach efforts through newspapers, bulletin boards, libraries, flyers, municipal offices, grocery stores, churches, podcasts, and digital platforms like Spotify and TV.

Barriers for Other Populations: Client indicated seniors, individuals with physical disabilities, those experiencing homelessness, individuals lacking transportation, people with mental health challenges, and non-English speakers face additional challenges when trying to access community services.

Community Feedback Mechanisms: Clients valued being consulted and suggested there was an opportunity for more focus groups, feedback posters, direct engagement, and community support fairs with feedback opportunities.

Referral Roundtables

Discussion from the first referral roundtable centered around the topic of referrals – what makes them successful and what are barriers to success. The following section summarizes the feedback.

When roundtable participants were asked what makes a successful referral these were the themes that were discussed:

- On-going follow up on clients and support for follow through.
- A warm hand off between service providers to ensure the client feels comfortable and supported through the process.
- An understanding of client needs and goals to ensure that referrals help clients meet their desired outcomes.
- Client readiness and willingness to take on the additional tasks that might be required from referrals.
- An understanding of referral services and the entry requirements for referrals and timelines to program entry.
- Signed release of confidential information where appropriate and possible.
- Common referral form to share the most relevant information.
- Having a social worker present to support the end user through referral processes.

When roundtable participants were asked about what prevents them from going above and beyond to facilitate a successful referral these were the themes that were discussed:

- Organizations lack the resources, including sufficient staff and staff time, to spend additional time on referrals.
- High staff turnover.
- The information sharing required for a smooth referral handoff is challenged by the red tape of the referral process and the consent and confidentiality that is required when handling client information.
- There is a lack of knowledge and understanding of the scope of organizations in the community available to support clients and when/how to complete that referral.
- A general concern that referrals will take clients away from the organization and leave them unable to meet their funding targets.

When roundtable participants were asked about how to address those barriers, the following themes were discussed:

- There is a need to make referrals simple and seamless, so they are not onerous for the client or organizations.
- A streamlined referral process using a shared intake and information sharing platform would make referrals easy.
- In order to make effective and impactful referrals, service providers need current and meaningful information about other community partners and resources.

- More networking and information sharing opportunities amongst community partners was considered key to facilitating effective referrals and building relationships.
- Creating case-specific service provider teams to provide client wrap around support could enhance outcomes.

Key Priorities

Four key priorities were selected for further exploration and roundtable discussion based on a discussion during the first roundtable and a follow up ranking poll that was shared amongst attendees. The key priorities identified include:

Priority 1: Better Engagement and Connections

Priority 2: Referral Directory

Priority 3: Common Streamlined Referral System

Priority 4: Frontline Staff Education and Engagement

Key considerations were identified for each priority at the second referral roundtable and are summarized below.

Priority 1: Better Engagement and Connections

The goal of this priority is to better engage and connect community service organizations across a range of services to better support and enable learner and job seeker success.

Referral Process Challenges:

- The process of making referrals was often challenged by delays due to agency waitlists, staffing changes, and rigid funding requirements that ultimately limit access to critical community services.
- Service providers must be aware of each other's capacities and mandates to ensure accurate and efficient referrals, and to avoid overwhelming services when not truly required.

Enhancing Personal Support & Client-Centric Approaches:

- Building trust through direct personal contact, guided/warm handoffs, and breaking down service navigation steps will improve the outcome of the referral for clients.
- To facilitate more streamlined referrals, agencies would need to focus on quick, client-aligned solutions while considering privacy, consent, and other systemic barriers.
- Simplifying processes and reducing over-reliance on tech-driven solutions helps enable access to referrals for all clients.
- A more flexible approach, including warm referrals and direct client handoffs, can reduce client re-traumatization and frustration.

Collaboration & Networking:

- Strong inter-organization networking prevents service duplication, improves referral efficiency, and reduces strain on overburdened organizations.
- A centralized and multilingual directory with all relevant community service providers, such as 211, can streamline referrals and improve access.
- Secure, collaborative platforms like Slack or dedicated websites could facilitate real-time information sharing but IT restrictions can make implementation difficult.

Data, Tracking & Continuous Improvement:

- Tracking referral success through quantitative and qualitative data helps measure impact and identify gaps and should provide insight and a feedback loop into how referrals can be improved on an on-going basis.
- By leveraging human contact, minimizing service silos, and fostering collaboration, agencies can enhance the overall client experience and promote better access to support.

Priority 2: Referral Directory

The goal of this priority is to explore the creation of a single location where community service organizations can go to find out about who else is out there to support their client needs and make a referral to.

Efficiency, Accessibility & Structure:

- It would be beneficial for the referral directory to be accessible in both digital and print formats to serve all clients, including those without internet access.
- Print versions could be available in key community locations, while an online version should allow for real-time updates and remain user-friendly. A designated champion should oversee its accuracy and relevance for both the Simcoe County and Muskoka District regions.
- To enhance usability, information about organizations and referrals should include clear service descriptions, eligibility criteria, and a sub-referral system for clients needing multiple services.

Usability, Functionality & Maintenance:

- The directory should be simple, minimizing clicks and complicated menus. It must remain consistently accurate, and it would be beneficial for agencies to be able to update their information in real-time.
- A keyword-based search system by service type or location will improve navigation.
- While advanced features like AI may be appealing, the focus should remain on optimizing existing systems rather than overcomplicating it.

Communication, Coordination & Oversight:

- Collaboration among service providers will be essential to continue to enhance referral opportunities for clients, with regular meetings ensuring consistent understanding of services.
- A tool like Slack could help agencies share service capacity updates.
- Dedicated staff time would be necessary for maintaining the directory, participating in networking, and making client connections.
- A schedule to maintain and update the directory should be developed, with a central figure overseeing its accuracy, professional engagement, and outreach.

Impact on Clients & Service Providers:

- A streamlined, well-maintained directory will enhance referral efficiency, reducing client frustration and improving outcomes.
- It is anticipated that clients could receive clearer, more timely referrals, leading to better client engagement.
- Service providers will also benefit from a more organized and informed process, which could lead to increased success in meeting service targets.

Priority 3: Common Streamlined Referral System

The goal of this priority is to explore the development of a shared and streamlined referral system to enable a smoother process for client referrals amongst community service providers.

Accuracy, Updates & Capacity Management:

- A successful referral system must be regularly updated with accurate service details, including wait times, capacity, and eligibility criteria.
- It would be beneficial for service providers to receive ongoing updates to ensure they make informed referrals.
- Managing capacity will prevent clients from facing long waitlists or feeling abandoned, making it essential for agencies to communicate their availability consistently through any referral system.

Efficiency, Integration & Usability:

- A centralized intake program that integrates seamlessly with existing systems (e.g., CAMS, SAMS) would streamline the process, reducing duplication and administrative burden on organization staff.
- Linking intake forms directly to the referral system further enhances efficiency.
- Any shared referral system should be user-friendly, easy to navigate, and require minimal training to ensure staff can focus more on client care rather than searching for information.

Consent, Confidentiality & Security:

- Consent and confidentiality need to be a primary consideration with any referral system or process put in place.
- Client consent must be obtained before referrals, with clear communication about the referral process.
- Confidentiality and privacy protections need to ensure compliance with oversight and funding requirements and maintain a secure system. As a result, platforms like Slack or AI-driven solutions may not be suitable due to confidentiality concerns. The focus should be on a secure, purpose-built referral tool that integrates with existing processes.

Feedback, Oversight & Continuous Improvement:

- A strong feedback loop will be important to measure referral success and impact, ensuring clients are connected to and benefit from appropriate services.
- Success can be tracked through participation rates, referral accuracy, client satisfaction, and outcome, were appropriate.

- A dedicated overseeing organization should manage ongoing system development, updates, and staff engagement.
- Encouraging regular participation and feedback will help refine the system and enhance its effectiveness over time.

Priority 4: Frontline Staff Education and Engagement

The goal of this priority is to ensure frontline staff of community organizations are engaged and informed about opportunities to enhance client outcomes through referrals and any systems to support those.

Supporting Staff & Resource Allocation:

- Frontline staff can feel overwhelmed due to the job pressures, so engagement efforts must focus on demonstrating how referrals, and any directory or new system will ease their workload rather than adding to it.
- Staff should be actively involved in referral system development to ensure practicality.
- Adequate funding and resources must be available for training, education, and ongoing system maintenance across all organizations.

Training, Onboarding & Rollout:

- The rollout of any new platform or process will require thorough testing and refinement before implementation.
- Training should be frequent, well-documented, and provided in multiple formats to accommodate different schedules and learning styles.
- Leadership will be needed to model the value of participation, and incentives like food or recognition can encourage engagement.
- Training should be scheduled in advance, structured to avoid overwhelming staff, and designed to be engaging and accessible.
- Training on 211 or other structured referral tools should also be prioritized.

System Usability & Agency Commitment:

- For widespread adoption, any developed referral system must be user-friendly, with a simple interface and easy navigation.
- It would be beneficial if organizations commit to its success, ensuring staff have dedicated time to utilize and update the system.
- Opportunities for networking and agency collaboration will further improve referrals and staff knowledge-sharing.

Referral Platform Development:

- Efforts to utilize and develop a referral platform should support and enhance the Fleming SSM Referral Platform and the SERCO SSM Referral Platform.

Feedback, Evaluation & Continuous Improvement:

- Tracking feedback and outcomes from staff and clients will indicate the effectiveness of the process's and system.
- Regular connection opportunities, networking events, and an up-to-date, searchable service directory will further enable referrals and enhance client outcomes.
- Ongoing evaluation is essential to measure improvements in client outcomes and refine the system over time.

Frontline Staff Discussion

Frontline staff were asked what they would like to learn or do at future frontline staff education meetings and the following key themes were discussed:

Networking: There was a strong desire to continue to allow staff to network with one another to enhance organizational connection and understanding of the scope of resources available in the community and their respective regions. It was noted that efforts should be made to try and truly be inclusive of all front line staff (i.e. shut down the office for one day) to really maximize learning and impact of meetings across organizations and staff.

Enhanced Connection and Knowledge Sharing: Staff expressed an interest in meeting to share information on tools, resources, and general organizational updates on a more frequent basis. It was suggested a tool like Zoom could be used to facilitate bi-monthly or quarterly meetings. It was also noted that when meeting in person, it would be helpful for each participant to share a bit about what each organization does or allow organizations to set up in a trade show format.

Broader Participation: While SM Skillforce worked hard to engage a range of organizations to participate in the roundtable sessions, there were some key organizations missing from attendance at the each of the sessions. Participants indicated they would like to see more involvement from Ontario Works, housing and shelter providers, and mental health organizations.

Outcomes

SM Skillforce immediately set to work developing solutions, opportunities, and resources to support the development of improved referral processes based on the feedback received from the roundtable sessions. As a result, a number of outcomes were already achieved through the course of this year's project, including resource and tool identification and development, improved connections between service providers, and service provider education and engagement.

Referral Directory: Based on feedback from participants that indicated community service partners would like to better understand who and when to refer to, SM Skillforce created a digital, searchable, online directory of community service providers in draft format. Feedback was received from the final roundtable events in Simcoe and Muskoka, and amendments have been made accordingly. SM Skillforce is now in the process of adding agencies to the database. A digital form was created to share with all relevant community service organizations. This can be sent out annually, or as new partners join the directory. It was suggested that the directory could be used as an initial tool to search for community organizations to make a further referral, whether through direct contact or an existing referral system.

Existing Referral Tool Identification and Promotion: During the roundtable discussions, participants identified that regional service system managers (SSMs) have tools to support referrals. Fleming College SSM has a referral system that allows referrals across community organizations, beyond those directly served or funded by the SSM. Currently SERCO's referral system is focused on referrals within the organizations they serve or fund, however they are exploring future opportunities to enhance the platform. SSMs were invited to share their referral tool with frontline staff participants in their respective region at the final roundtable events, and there is an on-going commitment for further education and enhancement of the referral tools to better meet the needs of clients and the organizations they serve.

Slack: A Slack page was developed and explored as a potential tool to support the priority of a streamlined referral system. As a result of confidentiality concerns, discussion indicated this was not the preferred solution for a referral system. However, further discussion noted that purpose Slack could be repurposed to support other priorities that do not require confidential information sharing (i.e. community organization announcements, questions and answers, etc.).

211: 211 was identified as a good source of virtual and phone-based information on community service organizations that could also support client referrals, beyond a referral directory. 211 was invited to give a presentation at the final roundtable events to help service providers understand the resources available to assist in making referrals.

Frontline Staff Education: The final roundtable events provided an avenue to bring together frontline staff to learn about referrals and the discussion that had taken place to date, the referral directory that had been developed, 211 as a tool that could be used to support their referral efforts, and the SSM referral platforms. This was the first opportunity to bring together frontline staff across organizations of what intends to become an annual event.

Improved Connections: Building and enhancing connections between different community service organizations was a key goal of this project. Each roundtable session allocated multiple opportunities for networking and participants frequently noted the value they received from it, meeting new people and learning about new resources. It was suggested future networking could be more regimented and focus on building more regional-level connections.

Conclusion and Recommendations

The SM Skillforce Referral Project has made significant strides in improving the referral process for employment and literacy community service organizations, and more generally across the community. By fostering meaningful discussions with organizational leaders, the project has articulated key challenges in the referral system and identified and supported the development of targeted solutions to enhance connectivity, knowledge and resource availability. However, there is still much opportunity to enhance the referral process and systems to better enhance client outcomes, and SM Skillforce intends to continue to lead those efforts into the coming year.

Building on the four key priorities and the extensive feedback gathered from both organizations and clients, the following potential actions outline the recommended next steps for further strengthening the referral process and systems:

- Continue to offer regular education, knowledge sharing, and networking opportunities for community service providers, especially on a local/regional basis. These could include:
    - Service provider networking
    - Service provider tradeshows
    - Presentations by different service providers on the scope of their services
    - Sharing successes and outcomes generally
- Continue to offer an up-to-date and searchable directory of service providers. Expand and reach out to relevant service providers, as identified, starting with those in Appendix A.
- Promote and support the uptake of the Fleming SSM Referral Platform, and future enhancement, where relevant.
- Support the enhancement of the SERCO SSM Referral Platform for more comprehensive referral solutions, where possible, and promote, where relevant.
- Establish an on-going evaluation framework to monitor client and organizational outcomes and feedback.
- Continue to engage clients to better understand their needs and ensure referral solutions meet them.

Appendix A: Who Others Would Like to See in the Room

Who others would like to see in the room?

Participants in the roundtables were asked to identify additional individuals or groups to include at future events that they believe could contribute to strengthening the referral network, fostering valuable connections, and improving outcomes for their clients. The responses included:

- Government Funders
- All three levels of government
- Simcoe Muskoka District Health Unit
- Doctors
- Other medical service providers
- Family connection and support workers
- Daycares
- Food security (including retailers)
- John Howard
- Legal
- Shelters
- Probation/parole
- Police
- School boards
- Post Secondary Institutions
- Chamber of Commerce
- BNI
- Community Futures
- Municipal economic development staff
- Mayors
- CMHA
- HANDS
- Information Orillia
- Gilbert's Centre
- Elizabeth Fry
- Busby
- Clients
- Poverty reduction groups
- Housing
- Immigration and newcomer supports
- Service Ontario
- Empower Simcoe
- United Way
- Media
- First Nations Band Members