Making Appropriate Referrals

When to Refer

- Listen carefully
  - Understand what is needed in the way of assistance. When a patron’s question or research is beyond your knowledge, greater than you can handle, otherwise in need of professional attention, or still unanswered after you have exhausted all the resources you are familiar with—this is the point when you should consider a referral.

- Know your limits
  - Know your own limits for giving accurate assistance. When in doubt, refer the patron to a more qualified resource.

- Seek consultation (as needed)
  - If you are unsure about how to best answer a patron’s question, seek a consultation with a knowledgeable person to find out about the options for helping the patron.
  - Let the patron know what you are doing. Clarify that you are seeking consultation by having the patron’s consent—this enables the patron to be informed and in control of the process.
  - When seeking consultative assistance, it is important to have clear and complete information about the needs of the patron.

How to Refer

- Be honest
  - Be direct and straightforward in your recommendation. Explain in clear and open manner why you feel it is desirable or necessary to make a referral.

- Become knowledgeable
  - Explain fully the services that can be obtained from the resource that you are recommending. Let the patron know how the referral source can be useful and describe the sources qualifications and capabilities.
  - Avoid making unnecessary referrals that may lead the patron on a series of referrals. If you are not sure if the referral source will be helpful to the patron—check with the source first.

- Demonstrate Respect
  - Allow the patron to assume responsibility and control in making a contact or an appointment. Use your best judgment—if the situation warrants that you place a call or send an email for the patron, please do so.

- Personalize the Referral Process
  - You may need to provide the patron with the name of a particular person(s) who can be a direct contact. A business card should be given to the patron if you are referring him or her to a subject specialist or staff member.
  - You can assist the patron in formulating questions or approaches to take when contacting subject specialists or other staff members.

- Carefully assess the need
  - If a patron resists or denies to need to referred to someone else, you have some choices to offer:
    - Re-explain and rephrase the services that can be obtained from the resource you are recommending.
    - Provide encouragement
    - If these steps do not work, you should just accept the patron’s decision not to take the referral.
    - If the patron is upset, you should get in contact with a supervisor or other full-time staff.