



Warm Referral Procedure

Providing services, resources and referrals are all areas in which programs are familiar with. The services, resources that we provide are survivor-centered at their core. However, in the referral process, it is not often taken into account the way in which the referral will be received by the survivor. It is transactional in nature. The goal for truly being survivor-centered is to have it be relational.

In addition to being survivor-centered, programs have their own mission and values that guide the day to day interaction with survivors. The mission and the vision, when carried out, provide a framework of operation that is complimentary to survivor-centered services. Survivors come to us a myriad of ways and with complex needs. It is your role as service providers to also be trauma-informed and equipped to meet the dynamic needs of the survivor.

In providing direct services to survivors, the ability to meet a survivor where they are is critical in assuring they are able to both access and receive services in a way that they have identified. Meeting a survivor where they are is more than a general recognition of their status as a survivor. It is a recognition of the complexity of the convergence of identities that exist and the intersection of those identities and their relation to survivorship. Assuring that a survivor never feels as if they are being asked to choose an identity in order to receive services is one of the ways in which we respect identity. This may be the first and only time in which a survivor reaches out for assistance in dealing with the trauma of their assault. Your response has to be one of positive regard for the survivor regardless of identity.

The level of service that is provided to a survivor, to the best of your ability will continue through the process of a warm referral. The term warm referral, is often referred to as warm handoff in the medical field with origins in customer service (Agency for Healthcare Research and Quality). A warm referral is defined as a connection that is made with the permission of the survivor, to an external service provider who is able to fill a need that has been identified by the survivor. This connection is made either in



Warm Referral Procedure

person, over the phone, via email, or chat. The survivor is connected directly with the provider in such a way that the advocate fades in the backdrop of the transfer.

The warm referral process requires learning of the resources that are available throughout the community. Each referral that is deemed a warm referral is made to an organization or agency that you have made contact with and are able to articulate the services that are offered from that resource. In building a connection with the referral source, share the services that you provide as well in order to be a resource to them. The services that are identified to be used in the warm referral process have been selected based on the information provided to us by the survivor.

As a service provider it is necessary to create a space whereby a survivor may share information fully and freely that is of a sensitive and intimate nature (Confidentiality Policy Considerations and Recommendations: A Resource Manual for Michigan Domestic and Sexual Violence Programs, 2018). It is in this space, where confidentiality resides that a survivor may be to have their needs met. In addition to the confidential space, anonymity creates an additional safeguard for survivors to share their truth. A survivor should be made aware of their right to share what they feel comfortable in sharing. There is never any pressure on a survivor to share information in order for them to access and/or receive our services. The more you create a space of acceptance and unconditional positive regard, the more information that will be shared with you naturally. The information that is shared by the survivor is to be safeguarded.

As you utilizes the tools and resources that are at your disposal, the greater the likelihood a survivor will share additional information that will aid in finding linkages and appropriate services for the warm referral to occur. In the presence of a listener who is an empathetic survivor-centered, trauma-informed an intersectional provider, a survivor can be their authentic self. They can share the things that no one else has allowed space for. In being this type of provider, you are holding yourself to a standard of care that is



Warm Referral Procedure

conducive to a positive experience on a survivor's journey of healing from the assault. You are opting in to holding yourself accountable for the level of care that you provide to those who entrust you with the most intimate and hurtful parts of their lived experience. This level of accountability, lasts until the survivor gets to the next service provider with a successful interaction (Sammer, 2015). To facilitate a successful interaction, the survivor must be informed and engaged in the process at every step. No information is to be exchanged without the survivor's informed consent. Informed consent means that the survivor has been given all of the information necessary to decide if they want you to conduct a warm referral. When the provider is able to establish trust, the referral process is much more likely to be accepted and followed up on (Daniel J. Whitaker, 2007).

The following process will guide you in making a warm referral:

1. Take the time necessary on the call to establish a connection with the survivor. This includes, identification of self, use of pronouns, asking the survivor how they would like to be addressed, and providing an empathetic listening ear while validating the survivor's experience.
2. Assess for the survivors safety.
3. Take the time to reaffirm confidentiality. The survivor decides how much information they share with us. All information that is revealed related to the survivors lived is experience will inform where the referral will be made.
4. Obtain informed consent to provide a warm referral. The consent is informed if the survivor is aware of what is offered from the agency they are being referred to, what are some of the potential outcomes of sharing information with the agency, and also potential outcomes of not utilizing the agency.
 - a. If referring to a LE agency, share with the survivor the language of law enforcement and what can be expected in service provision.



Warm Referral Procedure

- b. If referring for medical services that are not connected, explain the difference between SANE at a hospital and a member program.
 - c. If referring to a culturally specific program, share with the survivor the services that are provided, hours of operation, and what can be expected in service provision.
5. Inquire as to whether or not the survivor would like a follow-up done. Again, reassure confidentiality and the ability to remain anonymous. The follow-up can be in the form of us being available to receive a return call from the survivor.
6. Provide the warm referral by remaining with the survivor or on the line and connecting the survivor to the resource. If the survivor has chosen to not share a name, share with the provider the way in which the survivor has been chosen to be addressed. Your role is not to share all of the information that the survivor has shared with you, but to provide a connection to a resource that can further assist the survivor on their healing journey.

Your connecting survivors directly to the referral source versus just providing a number, can be an effective way in providing survivors with the resources that are needed (Jennifer Wolff, 2017). This direct connection through the warm referral process will allow you to be a possible conduit to a survivor recognizing they are not alone, that there are resources available, and that systems are capable of working together for the betterment of the survivor.

Once consent has been received and prior to the warm referral, ask the survivor for permission to follow-up to assure that referral was successful. The following considerations are to be made:

1. Is it a safe number to call;
2. If it is safe, who does the phone belong to;
3. If the phone does not belong to the survivor is it okay to leave a message;



Warm Referral Procedure

4. If it's okay to leave a message, how would the survivor like us to identify ourselves;
5. Who would the survivor like for us to say we are calling for (an assumed name);
6. What time of day and/or day is best to call;
7. Share with the survivor the number that shows up on caller id (555-555-0000); and
8. Share with the survivor the number of attempts to be made for follow-up.
9. Share with the survivor that they may contact you at any time as many times as they feel necessary.

Serving survivors is a privilege and we are to honor each survivor who chooses to share any amount of their story with us. We have gained the privilege of serving them due to a violence that 1 in 3 women and 1 in 6 men will experience in their lifetime. And that is of those that we know of through reporting. A dignified experience is the least they deserve.



Warm Referral Procedure

The State of Michigan Sexual Assault Hotline, is supported by Crime Victim Assistance Grant Award awarded to the Michigan Coalition to End Domestic and Sexual Violence by the Division of Victim Services, Michigan Department of Health and Human Services. The grant award comes from the Federal Crime Victims Fund, established by the Victims of Crime Act of 1984. The opinions, findings, and conclusions or recommendations expressed in this publication/program exhibition are those of the author(s) and do not necessarily reflect the view of the U.S. Department of Justice or the Michigan Department of Health and Human Services."

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