
COORDINATED REFERRAL PATHWAY

- Map existing Family Resource Manager/Navigator models within our region.
 - Target populations
 - Protocols
 - Procedures
- Identify limitations/gaps in existing models.
- Identify how a Family Resource Navigator might look.
- Create a consistent and coordinated referral pathway system.
 - How will it look?
 - How will it work?
 - What data do they need to collect?
 - How can we implement cross sector training?
 - How do we get parent feedback on the process and services?
- Include PCPCH referral information in newly designed referral pathway.
- Work with DHS to align referral pathway with Differential Response model.
- Provide family resource managers/navigators for families with young children that are in Drug & Alcohol Outreach programs.



EARLY LEARNING ALLIANCE FAMILY RESOURCE MANAGEMENT

Survey Reference Sheet

Family Resource Manager Functions

- **Navigate/ facilitate** – Acting as an intermediary for families to obtain services.
- **Coordinate** – Linking families to existing services. Reaching out and developing relationships with service providers.
- **Refer** – Help families access the services, supports and resources they need and are interested in receiving.
- **Advocate** – Promote, support and represent the interests of the family to the service delivery agency or provider, and help parents to advocate for themselves.
- **Assess and Identify Needs** – Collect information from families to assist in determining needs, interests and possible eligibility for various services. This may include family goal planning and prioritization.
- **Data Collection and Submission** – Track, collect and compile data for funders and local, state, and/or federal reporting. Identify gaps in services and the range of needs for family resource management.
- **Know Community Resources** – Being intimately familiar with local resources and stay current on availability and eligibility.
- **Develop Relationships** – Developing and maintaining positive relationships with families.

Levels of Intensity Related to Family Resource Management / Navigation:

1. **Give out pamphlet or phone number to parent for them to follow through on their own.** (Lite touch)
2. **Conduct pre-checks, screening or research before they give referrals.** (Is NAME eligible for your services?) Do you have openings?, etc.), if necessary.
3. **Make warm hand-offs to agencies:** Make call with parent, help them follow through and be sure the contact is made.
4. **Provide immediate tangible resources to parent, when easily accessed, to remedy emergent need** (diapers, bus pass, food box)
5. **Help family complete paperwork or documentation;** this may involve providing literacy and translation supports.
6. **Go with family to an intake or appointment.**
7. **Help find funding for a resource or service.**

United Way of Lane County



Lane Early Learning Alliance

Family Resource Management Survey Report

March 2015

Introduction

The Lane Early Learning Alliance envisions a community in which all Lane County community members and organizations are unified in an effort to provide families with the resources and support they need to ensure the health, safety and success of their children. We know that parent support and access to services are essential to family stability and wellbeing. In order to successfully provide these supports to families, organizations and services across sectors must be coordinated and effective in their role as family resource managers or navigators.



To determine our community's existing capabilities and outstanding needs surrounding family resource management, the Lane Early Learning Alliance, convened the Family Resource Management Innovation Team comprised of early learning stakeholders, partners and ELA staff. The Team began addressing this topic by defining the functions and breadth of family resource management and then creating a survey to gather baseline data on family resource management as it currently exists in Lane County. Survey results will guide the Lane Early Learning Alliance in deciding next steps to be taken to fill the gaps in family resource management and create one efficient system of family resource referral and service provision in Lane County.

Methodology

Instrument Development

The Family Resource Management Innovation Team met to discuss the key aspects of family resource management and identify community needs. The group created a list of family resource management functions, and a second list that identified a range of intensity surrounding family resource management functions. A survey reference sheet was created to reflect these two aspects of family resource management:

Family Resource Manager Functions

- **Navigate/ facilitate** – Acting as an intermediary for families to obtain services.
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- **Assess and Identify Needs** – Collect information from families to assist in determining needs, interests and possible eligibility for various services. This may include family goal planning and prioritization.
- **Data Collection and Submission** – Track, collect and compile data for funders and local, state, and/or federal reporting. Identify gaps in services and the range of needs for family resource management.

- **Know Community Resources** – Being intimately familiar with local resources and stay current on availability and eligibility.
- **Develop Relationships** – Developing and maintaining positive relationships with families.

Levels of Intensity

- **Give out pamphlet or phone number to parent for them to follow through on their own.** (Light touch)
- **Conduct pre-checks, screening or research before they give referrals.** (Is NAME eligible for your services? Do you have openings?, etc.), if necessary.
- **Make warm hand-offs to agencies:** Make call with parent, help them follow through and be sure the contact is made.
- **Provide immediate tangible resources to parent, when easily accessed, to remedy emergent need** (diapers, bus pass, food box)
- **Help family complete paperwork or documentation;** this may involve providing literacy and translation supports.
- **Go with family to an intake or appointment.**
- **Help find funding for a resource or service.**

Participant Selection

The Family Resource Management Innovation Team, with input from the broader Early Learning Stakeholders' group, identified community organizations that perform family resource management functions as part of their existing services or programs. These agencies were asked to participate in the survey. In order to get the most accurate and consistent responses from an organization-wide perspective, the group decided to survey a director or other designated high-level staff member with authority and knowledge to speak for the agency or program.

Data in this report was collected from 24 individuals representing their agency or program, and two groups who completed in-person group interviews. The two groups surveyed were the Family Resource Managers group (9 participants) and the Homeless Liaisons group (7 participants). These participants were interviewed in a group setting because there is no one person that can speak for the entire group, and because the performance of the family resource functions varies from site to site. Each group meets regularly and the survey was conducted in person as part of each group's regular meeting. Survey responses were recorded to represent all of the answers from group participants. In some cases this was the same response for all participants and in other cases there were two or three different responses recorded for the same question.

The organizations and programs surveyed were:

CASA of Lane County	Family Relief Nursery	Oregon Teen Parent Program
Catholic Community Services	Family Resource Centers*	Pearl Buck Center Preschool
Centro Latino Americano	Head Start of Lane County	Relief Nursery
DHS – Child Welfare	Healthy Families Lane County	Relief Nursery – Family Navigator Program
DHS – Family Resource Worker	Homeless Liaisons*	St. Vincent Family Shelter
DHS – Self Sufficiency	Lane County Developmental Disabilities Services	Trillium Community Health Plan
Downtown Languages	Maternal Child Health Programs – Cacoan & Babies First	WIC
Early Childhood CARES	Nurse Family Partnership	Willamette Family Treatment
Family Connections of Lane & Douglas Counties	Oregon Family Services Network	

*Group Survey

Data Collection

The director of each participating organization received an email in advance containing the Family Resource Management Survey Reference Sheet. Participants were asked to review the definitions created by the task force, and to prepare for a 10 – 15 minute survey. Individual phone survey interview times were scheduled, and at that time received a call from the surveyor, who used the Family Resource Management Phone Survey Script to conduct the survey (*See Exhibit 1*).

Survey participants were asked to use the Survey Reference Sheet for the first part of the survey, and to answer whether or not each family resource manager function and each level of intensity was being performed by staff at their organization. The responses they were asked to select from were- *yes, sometimes, rarely, no*.*

Survey participants were then asked several open-ended questions to help capture information about capacity, data tracking, and perceptions of family resource management as it currently exists in Lane County.

*Note: When analyzing the data it was decided to add an additional response category in order to most accurately represent the findings. The “qualified yes” category was added to capture the instances when an organization responded “yes” to a question but then gave specific circumstances in which it takes place (eg. yes, but only for the energy assistance program). This type of response was counted as a “qualified yes.”

Survey Results

What do you call your family resource manager or navigator?

Almost every survey participant used a term that was not used in other programs or agencies to describe the person who performs family resource management functions. The only exception was the “case manager” title, which was used in four different programs. Many other terms were repeated in various combinations such as “family, parent, support, navigator, coordinator, manager and worker” and some titles were more specific to the name or focus of the program that the person worked with most closely. Below is a complete list of the titles used in the agencies and programs surveyed.

CASA Volunteer	Coordinator	NFP Nurses
Case Manager	Family Development Specialist	Parent Navigator; Family Support Coordinator
Case Manager	Family Navigators	Parent Provider Consultant
Case Manager; Family Advocate	Family Resource Worker	Service Coordinator
Case Manager; Service Coordinator	Home Visitors	Staff; Family Resource Managers
Case Managers	Homeless Liaisons/ McKinney Vento Liaisons	Teacher Advocate; Family Support Coordinator
Case Workers	Maternal Child Health Home Visiting Nurses	Teacher Interventionists
Community Health Worker; Care Coordinator	Navigator & Family Partner	Teachers; Pilas Coordinator
Community Service Workers	Outreach Worker; Teacher; Navigator	Teen Parent Coordinator

Does your Family Resource Manager/Navigator:

Function	Yes	Qualified Yes	Sometimes	Rarely	No
Navigate/Facilitate	21	3	6	3	
Coordinate	26		5	1	1
Refer	31		1		1
Advocate	22		8	2	1
Assess/ Identify Needs	26	2	1		
a. Collect/Report Data	27		2	1	3
b. Identify Gaps	10		11	1	10
Know Community Resources	28	2	3		
Develop Relationships	29		3	1	

Based on this data it is clear that all of the surveyed agencies are performing family resource management duties. Most functions received a majority of responses in the “yes” or “sometimes” categories, with the biggest exception being the identifying gaps function. It appears from the responses that agencies and programs lack the system or capacity to identify gaps in services. The two other functions that were less robust were advocating for clients and navigating /facilitating referrals. Participants whose responses were counted as a “qualified yes” noted that they completed the function within a specific program in their agency, or when working with select populations.

Does your Family Resource Manager/Navigator:

Level of Intensity	Yes	Qualified Yes	Sometimes	Rarely	No
Give Pamphlet/Phone No.	24		8	1	1
Conduct Pre-checks/ Screen	13	1	13	1	5
Conduct Warm Hand-offs	15		12	1	4
Provide Immediate Resources	15		8	2	9
Help Complete Paperwork	21	1	1		4
Go with Family to Appointment	7	2	10	2	11
Help Find Funding	11	2	8	4	6

Nearly all surveyed participants reported that they give out information or phone numbers to clients. The more intensive the support became, the fewer agencies and programs responded that they performed the task. There were a high number of responses in the “sometimes” and “rarely” categories, which indicates that a more intensive level of support is inconsistently provided. Comments from participants suggested that many of these intensive tasks would be completed more frequently and consistently if there were more resources (time, money, capacity, etc.) allocated to family resource management functions.

1. *Do your family resource managers currently follow up about success of referrals & access to services?*

Yes	Qualified Yes	Sometimes	Rarely	No
13	6	8	1	1

The majority of responses indicate that organizations and programs do get feedback on the success of referrals. Few programs reported having a systematic way to record the success of referrals, and many stated that feedback was primarily anecdotal. The participants who responded “sometimes” or “qualified yes” explained that follow-up only occurred if the family or client remained with the organization as part of a specific program, or if there was an opportunity for a natural or informal follow-up. With clients with whom there is regular and more frequent contact it is easier to ask how things had gone with a referral, but when

there is a one-time or infrequent contact with clients it is difficult to track the result of a referral. Most agencies and programs responded that there is no requirement or process for checking follow-up on referrals in their organization.

2. *Do you record data on:*

a. number & types of referrals made at your agency?

Yes	Qualified Yes	Sometimes	Rarely	No
10	2	3	1	2

b. On the outcomes of your referrals?

Yes	Qualified Yes	Sometimes	Rarely	No
6	6	2		8

This question was asked as a two-part question (part a and part b), and answers to each part of the question were often different however, numerous respondents did not answer part 'b' of the question.

Many participants responded that while data on referrals and outcomes was tracked, it was on an irregular or case-by-case basis depending on the program or staff member. Several organizations noted that they are currently in the process of figuring out how to better capture, track and report this data.

3. *Where do your providers get information about resources?*

Responses primarily fell into 6 categories:

211	16
Informal Networking	16
Experience	7
White Bird Help Book	6
Homegrown Resource Guide	5
Parenting Now! Resource Flyer	4

A common theme among respondents was that each individual staff member does the best they can to stay up-to-date about available resources, and sometimes this is done on an agency or program level. Without exception, agencies reported that their methods for getting updated information are informal and disorganized.

4. *What do you think the gaps are in family resource management/navigation in our community?*

Not enough resources	18
Affordable Housing	5
Ability to track outcomes of referrals	5
Access to reliable and up-to-date resources	4
Transportation	3
Families do not know where to go for help	3
Reaching hard-to-reach families	3
Services for Hispanic families	3
Rural areas	2
Affordable child care	2
Mental Health	2
Vocational/jobs	2
Services for adolescents and teens	2

The most common response was that there are not enough resources to meet the needs of families in Lane County. Some were more specific about the lack of resources in one particular area such as housing or utility assistance; however the general concern was that they often know where to send families, but then there are long wait lists and not enough resources.

Another theme that emerged was that organizations lacked time and staffing to be able to track referrals, follow-up with clients and record data. They do not have the capacity or tools to do this.

It was repeatedly mentioned that service providers wished there was one common place where they could find out about real-time, up-to-date resources available in Lane County. The function of 211 was mentioned frequently, however participants said they would like this system to be more user-friendly, more accurate and more relevant to the community.

5. *Would you be willing to work together with other programs providing family resources/navigation in our county to coordinate and enhance your efforts in this area?*

100% of survey participants responded yes.

Recommendations for Next Steps

- Convene the Family Resource Management Innovation Team, inviting all survey respondents who indicated an interest in participating.
- Confirm that the identified functions and intensity of family resource management is a complete list and description and that it should be used as the foundation for the work of this Innovation Team.
- Explore creating one common name for this position to avoid confusion and create cohesion.
- Create a system for identifying gaps in services and resources.
- Develop a systematic way to follow up on referrals and track results.
- Create a common, central location for resources and up-to-date information to be accessed by all.

DRAFT

**Family Resource Managers / Navigators Interview Survey
Early Learning Alliance FRM Work-Group**

Program / Agency: _____

Who is answering the questions: _____

Contact info- Phone: _____ **E-mail:** _____

Date of interview: _____ **Interviewer:** _____

-We want to understand what capacity currently exists at your organization, and what additional supports may be needed, regarding family resource management / navigation.

-We sent you two lists, the first being a list of the functions of a family resource manager as defined by our work group.

-We would like to know which functions the providers in your program currently offer.

-For each function listed, please answer: Yes , No or Sometimes

Family Resource Manager Functions

- Navigate/ facilitate** – Acting as an intermediary for families to obtain services.
 Yes No Sometimes
- **Coordinate** – Linking families to existing services. Reaching out and developing relationships with places that provide services.
 Yes No Sometimes
- **Refer** – Help families access the services, supports and resources they need and are interested in receiving.
 Yes No Sometimes
- **Advocate** – Promote, support and represent the interests of the family to the service delivery agency or provider and help parents to advocate for themselves.
 Yes No Sometimes
- **Assess and Identify Needs** – Collect information from families to assist in determining needs, interests and possible eligibility for various services. This may include family goal planning and prioritization.
 Yes No Sometimes
- **Data collection and Submission** – Track, collect and compile data for funders and local, state, and/or federal reporting. Identify gaps in services

and the range of needs for family resource management.

Yes No Sometimes

- **Know Community Resources** – Being intimately familiar with local resources and stay current on availability and eligibility.

Yes No Sometimes

- **Develop Relationships** – Developing and maintaining positive relationships with families.

Yes No Sometimes

-Now, looking at the levels of intensity we have defined, what do your providers currently provide? Please answer: Yes , No or Sometimes for each level

Levels of Intensity / Touch

1. **Give out pamphlet or phone number to parent for them to follow through on their own.** (Lite touch)

Yes No Sometimes

2. **Conduct pre-checks, screening or research before they give referrals.** (Is NAME eligible for your services? Do you have openings? etc.), if necessary.

Yes No Sometimes

3. **Make warm hand-offs to agencies:** Make call with parent, help them follow through and be sure the contact is made.

Yes No Sometimes

4. **Provide immediate tangible resources to parent, when easily accessed, to remedy emergent need** (diapers, bus pass, food box, etc.)

Yes No Sometimes

5. **Help family complete paperwork/documentation;** this may involve providing literacy and translation supports

Yes No Sometimes

6. **Go with family to an intake or appointment**

Yes No Sometimes

7. **Help find funding for a resource or service**

Yes No Sometimes

General Questions

-What do you call the providers in your agency who work in this role?

-Do your family resource managers currently follow up with families about the success of referrals and access to services? Please answer: Yes, No or Sometimes.

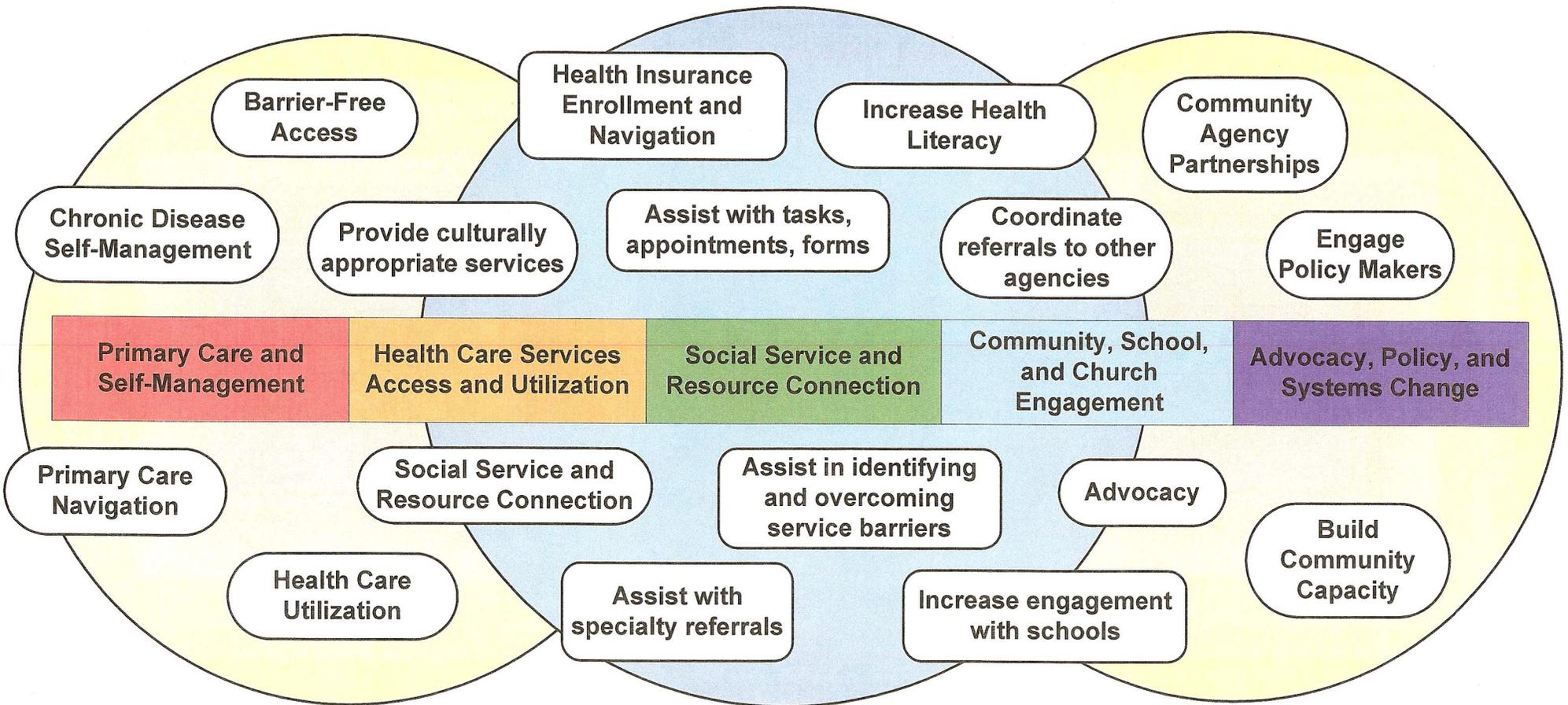
Yes No Sometimes

-Do you record data on number and types of referrals made at your agency? On the outcomes of your referrals? If you do, how is this kept?

-Where do your providers get information about resources?

-What do you think the gaps are in family resource management / navigation in our community?

-Would you be willing to work together with other programs providing family resources / navigation in our county to coordinate and enhance your efforts in this area?



Clinical ↔ Resource ↔ Community

Health Navigator Continuum

