

Solidifying Integration Points: Moving from Add-on Referral to Business as Usual

Work Session

Please take the next 20min to answer the following questions for at least one Integration Partner that will integrate referrals to a financial empowerment service.

1. What is the financial empowerment service? (e.g. financial counseling)
2. Who is the Integration Partner? (e.g. Volunteers of America)
3. What program(s) provided by the Integration Partner will include referrals to the identified financial empowerment service? (e.g. Homeless Veterans Shelter – case management)
4. What are the reasons for integration of referral to the financial empowerment service – what are potential positive outcomes of integration?

5. Explain the service delivery process of the program and where within service delivery [client touchpoint(s)] the referral to a financial empowerment service will occur (step by step).

6. What type of referral will be made to the financial empowerment service (hard or soft)? Will there be follow-up between the Integration Partner and the financial empowerment service?

7. What data or metrics are tracked by the Integration Partner? What data tracking platform or database type is used by the Integration Partner?

8. How might the positive outcomes identified above be measured to evaluate the integration point?