

WIOA Regional Professional Development



**Making Effective WIOA Referrals:  
10 steps to Consider to Ensure a Successful Referral Process**

# Seek to Understand, Then be Understood



- Always **start with listening**
- Try to **understand** what the need really is.
- What is your understanding of what we do
- What have you heard about our agency
- **Patience upfront = productivity down the road.**

# Assess for Immediacy of Needs



- What brings you in now or caused you to call us today versus 2 months ago
- What is happening that would be important for us to know about upfront?

# Study Up- Now Repeat



- Master your agencies mission and process
- Study your core partners processes and mission
- How's that cross training?
- WIOA 101
- It gets easier
- If unsure about something...

# Ask For Consult When Necessary



- We all have questions
- If you're not understanding something chances are someone else isn't either
- Know who to go to for the answer

# Continuously Reassess and Check for Clarity



- Referrals don't just happen at the beginning of the case
- Are other factors emerging?
- Is your customer's goal still consistent
- Are other opportunities now available for your customer?

# Join a Team



Be part of an...

- ✓ integrated resource team
- ✓ business services team or
- ✓ any team that allows you to be in contact with your partners
- ✓ opportunity to collaborate
- ✓ opportunity to refer

# Learn the language of your partners



- Exercise in partner language - Assessment



# Technology is Good



- Access online assessments partner tools...

# Start With One Person



- Easy to be overwhelmed
- Start small and build out from there
- What worked, what didn't

# Document, Document, Document!!!



- What service are you referring for
- What was the reason?
- When did you refer?

# Case Study:

**WIOA**

Professional Development

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Thank you!!