**Integrating Evidence-based Practices into Early Identification and Referral Action Plan**

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| **Practice A: Building rapport and establishing credibility with primary referral sources**  |
| **Description** | **Things to think about** | **Implementation Activities**  |
| * Visits to and meetings with representatives from targeted system(s)
* Clear, concise message
* Well-planned visits and meetings
* Assured, confident, knowledgeable messenger
* Well-planned follow-up

Adapted from *Improving Outreach to Primary Referral Sources*; TRACE Practice Guide, Nov 2006. <http://www.tracecenter.info/practiceguides/practiceguides_vol1_no3.pdf> | **Planning meetings/visits** 1. Have you identified the best contact(s) within the targeted system(s)? Can the person help you gain access to key contacts?
2. Does the person you’re meeting with have responsibility for making referrals?
3. Have you prepared a tailored message for the meeting? Does the message include the benefits of technical assistance from your project?
4. Do you have written materials to reinforce your message?
5. Have you identified the best person to conduct the meeting/visit and deliver the message? (e.g. staff member, parent, member of your advisory board, medical specialist)
6. Have you practiced what you’re going to say?
7. If you’re not the messenger have you reviewed the message/coached the messenger?
8. Have you thought about questions that might be asked and how you will answer them?
9. Have you planned how you're going to wrap up and summarize the meeting?
10. Have you planned how you will follow up?
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| **Practice B: Highlighting and repeating a focused message about the benefits of referral (to both the referral source and the child)**  |
| **Description**  | **Things to think about** | **Implementation Activities**  |
| * Highly focused message
* Delivered a number of times in a variety of ways different ways (e.g. website, presentations, training)
* Well-planned follow-up

Adapted from *Improving Outreach to Primary Referral Sources*; TRACE Practice Guide, Nov 2006. <http://www.tracecenter.info/practiceguides/practiceguides_vol1_no3.pdf> | 1. Have you prepared tailored messages for varied audiences? Does the message include the benefits of technical assistance from your project?
2. What are some of the ways you plan to share your message?
3. Are plans for sharing your message integrated into ongoing project activities? (e.g. Are you on the calendar for recurring events?)
4. Do you have any ideas for how to generate excitement, recognition within the broader community?
5. Is your website linked to other websites?
6. Do you use social media to share data, results, stories?
7. Are your resources accessible to persons beyond the field of deaf-blindness?
8. Do you have clear evaluation plans in place to follow up on targeted and intensive TA?
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| **Practice C: Using concise, graphic written materials that describe the services the referral source and the child being referred will receive from your program**  |
| **Description**  | **Things to think about** | **Implementation Activities**  |
| *Message Framing** Identify target audience (be as specific as possible)
* Identify desired or expected benefit to targeted audience
* Prepare a positive, gain-framed message (focused on benefits of program/positive consequences to the children being referred)

*Material Preparation** Personalize written materials for targeted audience
* Describe reasons and benefits for making referrals
* Include guidance for how to make referrals

*Intervention** Identify ways printed materials will be disseminated and used to promote referrals
* Use the printed materials as part of outreach to targeted system(s)
* Provide tailored feedback to referral sources

Adapted from TRACE *Endpoints*, Dec 2006 <http://www.tracecenter.info/endpoints/endpoints_vol2_no4.pdf> | 1. Have you identified specific points you want your materials to make?
2. Is each point relevant to the audience (system) you’re targeting? For example, are there points you want to make in materials distributed to families that might be different than points you want to make to speech pathologists?
3. Are you clear about the benefits of referral to your project?
4. Does the message include the benefits of technical assistance from your project?
5. Do you use language/data that connects to the audience you’re targeting? (e.g. “Pediatricians now generally recognize the importance of early intervention”, “More than 85% of children with vision and hearing loss have additional disabilities”)
6. Have you provided specifics about how to make a referral? Is there anything you can do to make the referral process easier?
7. Are written materials integrated into project outreach activities?
8. Have you thought about what kind of feedback would be most useful to the system you’re targeting? Have you thought of ways to provide different feedback to different sources?

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| **Practice D: Following up with referral sources to answer questions and provide additional information**  |
| **Description** | **Things to think about** | **Implementation Activities** |
| * Timely
* Ongoing contact
* Keeps contacts informed
* Acknowledges communication and referrals
* Personalized feedback
* Opportunities to provide updates about children who have been referred
* Integrated into overall planning
* Keeps targeted systems informed of project activities

Adapted from *Improving Outreach to Primary Referral Sources*; TRACE Practice Guide, Nov 2006. <http://www.tracecenter.info/practiceguides/practiceguides_vol1_no3.pdf> | **Follow-up to meetings and visits** 1. Do you consistently thank people for their time after a meeting?
2. Do you have an ongoing system in place for keeping in touch with individuals from targeted system(s)?

**Referral Follow-up** 1. Do you acknowledge receipt of all referrals in a timely manner?
2. Do you inform referral sources about the status of referrals?
3. Do you provide regular feedback to the referral source of each child receiving intensive TA?

**TA Follow-up**1. Do you have clear evaluation plans in place to follow up on targeted and intensive TA?
2. Do you share data about project results and information about project accomplishments with targeted audiences in a systematic manner?
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