



# Referral Pathways: A toolkit for library staff

# Referrals and libraries: building connections

Libraries are nerve centres of the community. We connect people to each other, to information, to services. One key way that is done is through referral pathways.

The Libraries for Health and Wellbeing Framework defines the role that libraries play in supporting the social, mental, and physical health of our communities.

- We **support** our partners.
- We **build** skills.
- We **provide** resources.
- We **make** connections.
- We **amplify** voices.

Through referring library patrons to the best services to help them, we are supporting their health and wellbeing and the broader health networks of our communities, within the scope of our roles as library staff.

## What is a Referral Pathway?

The term referral pathway is used to talk about the way in which services, including libraries, refer their users to use other services. It includes identifying needs and matching them to the best supports. It can include strong partnerships, or simply providing accurate information.

Referral pathways go both into the library (bringing people in from other services) and out of the library (sending people from the library to other services). Both should be done well for the library to have the most effective role in supporting community health. To do that, libraries should:

- Identify key stakeholders and clearly define their roles
- Communicate effectively
- Ensure true collaboration by all parties
- Develop cultural and linguistic competence.

Ideally, a library would focus on one or two referral pathways at a time, and build, clarify, edit, and embed the process until it becomes business as usual. Regular reviews are always important, to ensure that pathways are still fit for purpose, as is regular gap analysis.

## Types of referrals

**Referrals Out** – when the library is referring somebody to another service point or organisation. This can take several different forms, including:

- **Warm referrals** – when the staff member discusses what’s needed with the patron, calls the service to see that they’re open, and possibly makes an appointment for them. This could include calling a shelter to find out if they have a bed available, or talking to a parent worried about their child’s development and walking them over to Maternal and Child Health (if collocated) or making a call for them. Warm referrals take a little longer but the patron is more likely to engage with the service and attend the appointment.
- **Cold referrals** – when the staff member provides a patron with contact details or a flyer for a relevant service or organisation to follow up with.
- **Passive referrals** – providing brochures, posters (including in discreet locations, such as the back of toilet doors) etc. for local services to give patrons relevant information with which they can engage as needed.

**Referrals In** – when other organisations are referring people into the library, for connection, programs, and more. Community partnerships are key to ensuring that local services know about what the library can offer and consistently refer their clients to us.

## Why is this core library work?

Referrals are all about connecting people to the information and services they need. This is something that libraries have always excelled at – connecting people to reliable information. In this case, we are providing them with information about the available services, rather than a book or a database.

To do this well and to provide quality information, each library service and branch should have an idea of their key local services, what they do, and how to contact them.

## What's happening now?

Each library service (and sometimes each branch) has developed their own range of referral pathways. Many libraries have excellent templates and toolkits for referrals to their local services, and are doing deep partnership work to enable referrals in from other services. However, best practise is not always being shared and each service is reinventing their approach from scratch.

The aim of this work is to provide a framework and a common approach and language for referrals, highlighting the importance of this work and giving a state-wide focus. It builds on the work of the *Libraries for Health and Wellbeing – a partnerships toolkit*.



# Our model



## Making Connections

A fully developed referral pathway network leverages relationships built on multiple levels.

Our model recommends the establishment of referral pathways on four levels:

- One to one
- One to several
- One to many
- One to all



These pathways are designed to achieve different positive outcomes for both libraries and the community. They can differ in terms of who is doing the talking, who is driving the relationship, scale, and the shared benefits for all partners.

In reviewing how a library service manages its referral network, it is key to understand each level, and how a service promotes, trains staff, makes connections and fosters relationships in each area.

# Our model: One-to-One

## Definition

- A one-to-one interaction that seeks to address an individual's need or needs by connecting them to resources or services
- These referrals often happen at the information desk or on the front line
- May involve a reference interview

## Who

- Front desk library staff
- Community members
- Private sector workers dealing with the community
- Community sector workers

## Impact & Benefits

- Enhanced engagement and improved outcomes in the community sector, including doctors, maternal childcare workers, social services & programs such as housing, legal & health
- Increased visits, loans and program attendance for libraries
- Increased access to library resources for the community
- Improved service offerings for the whole community

## Examples

One-to-one referrals capture what is at the core of all library work: helping the individual to meet their needs and connecting them to information.

Real world examples of one-to-one referrals include:

- a community member seeking information about temporary accommodation
- a researcher looking for materials not held by the library
- a doctor referring a patient to the library as part of a social prescribing plan
- a family member may refer a senior to the library for assistance with technology
- an early childhood educator may refer a parent to the library for wide access to resources

The benefits of the referral are clear and direct, and can be realised due to libraries' strengths not only as a place that is free, non-judgmental, trusted, and accessible for all, but as information experts (*Libraries for Health and Wellbeing 2024*).

# Our model: One-to-Several

## Definition

- A broader referral that addresses local needs in the community, targeting groups in the population
- This is often through delivery of a program (in the library or in the community)

## Who

- Front desk staff
- Library Program Coordinators
- Community members
- Community groups and services
- Private Enterprise

## Impact & Benefits

- Increased visits, loans and program attendance for libraries
- Increased access to library resources for the community
- Enhanced engagement and improved outcomes for the community through connection
- Access to lifelong learning opportunities.

## Examples

One-to-several referrals happen on a larger scale, and often include programming. Examples include:

- Posters for local services displayed on library community boards
- Displays that incorporate collections and resources to meet a local need
- Introductory technology classes which inspire further learning
- Storytimes that engage local families in building early literacy
- Services having pop up information stands during or after storytimes, such as domestic violence support

Using programs as a vehicle for referrals, libraries provide a stepping stone to where further skills, assistance or knowledge can be found. Referrals are driven by local issues, often identified through local channels such as council or community groups and rely on library resources to be delivered.

# Our model: One-to-Many



## Definition

- High level partnerships and advocacy that aim to serve many in the community, such as at an LGA-wide level
- May include programming, but at a larger scale than the one-to-several level which focuses on individual programs
- Requires leaders to identify synergies and opportunities for collaboration and advocate for library services
- May include radical partnerships

## Who

- Library leaders – Programs and Partnerships Coordinators, managers, and other senior leaders
- Leaders in community organisations, council departments, businesses, schools and associations
- Community members

## Impact & Benefits

- Many sectors share common strategic goals and partnerships empower both parties to meet these goals, while driving traffic to both organisations
- Organisations benefit from libraries' positive reputations as safe and trusted place
- Advocacy to new audiences, creating avenues to increase visitation, loans and membership

## Examples

One-to-many referrals are wider than single programs, and focus on broader sections of the community or a whole Local Government Area. Library services may partner with councils, arts organisations, healthcare providers, community groups and others to build referral pathways that enhance services and offerings for the wider community. Examples could include:

- For Maternal and Child Health, referrals work both ways, with MCH referring families to library storytimes and library staff attending new parent groups
- Partnerships with leisure centres can involve outreach library programming, marketing, and collections that helps leisure staff direct patrons to the library, and library patrons to the leisure centre
- Local traders associations may host a Story Trail in their windows to attract more library users to the shops, and also send more shoppers to the library
- Library promotional materials can be sent out with rate notices or other bills. Meservey Public Library (Iowa) advertises in the town's monthly water bills. This works to increase library visitation and connect residents in with library services.

These referrals leverage deep partnerships and community connections to drive traffic to the library, and also from the library to our partner organisations. They can boost membership, visitation, and loans, as well as helping partners reach the right audiences and hit their own targets.

Ready Set Read is a program run at the Mornington Peninsula Libraries that began back in 2012 to promote early years literacy skills to the community.

Strong partnerships have since been developed with Council Maternal Child Health Services, Local Early Years Educators and Playgroups, meaning that the program has now evolved to include a dedicated library outreach officer attending various council run programs including immunisation sessions, first time parenting groups, supported playgroups, preschools, and kindergartens in order to refer new families to library services that can support their child's early literacy outcomes.

Depending on the type of visits, parents are offered an opportunity to sign up to the library on the spot, or in the case of preschools and kindergartens where guardians may not be present, a call to action in the shape of a referral slip to visit the library to collect a finger puppet is provided.

In 2022, the program reached 3340 children and 2084 adults in the local community. More than 1300 new memberships were activated not to mention the refreshed interest of existing members learning about services that they have otherwise been unaware of. The relationship forged between the various services mean that even when the library outreach officer is not in attendance, knowledge of library services is strong, and partners still feel confident to refer people to the library independently.

# Our model: One-to-All



## Definition

- A macro-referral system that identifies outcome synergies and a relationship with mutual benefit
- A collaboration between two state level organisations where the benefit is mutual and the output is delivered at a local level
- Statewide units linking authority/association/department with local service providers through high level relationships

## Who

- CEOs of departments / associations / authority
- Public Libraries Victoria (PLV)
- Local service providers

## Impact & Benefits

- Libraries reach a wider audience, increasing brand recognition and giving opportunities to change perceptions and advocate for funding, as well as increasing visitation, membership, and loans
- Association with libraries' positive reputation and improved service offerings at minimal costs for other organisations
- Strengthens the broader community

## Examples

At the state-wide level the key is to link and advocate library services to a larger audience. Examples could include:

- Public Transport Victoria and PLV (Public Library Victoria) finding opportunities to create user experience through libraries on public transport via service delivery
- PLV and the Law Institute of Victoria
- Vic Health and State Library partnership <https://www.vichealth.vic.gov.au/programs-and-projects/state-library-partnership-2023>
- Similar statewide referral mechanisms include VAMCHN (Victorian Association of Maternal and Child Health Nurses) and PLV

State-wide referral networks can use scale to reach a wide number of people, gaining reach and efficiencies through working with large partner organisations. Again, referrals go both into the library and out into partner organisations.

In 2019 Toronto Public Library (TPL) and the Toronto Transit Commission (TTC) released TTC Reads. This initiative saw commuters linked into TPL eBook offerings all curated by librarians especially for commuters via [tpl.ca/ttcreads](http://tpl.ca/ttcreads). Both library card holders and non-library card holders can sample all of the curated digital content. The program then encourages people to join to enjoy the rest of the eBooks and eAudio collections available.

[https://torontopubliclibrary.typepad.com/news\\_releases/2019/09/tpl-and-the-ttc-partner-to-launch-campaign-to-provide-free-ebooks-to-commuters.html](https://torontopubliclibrary.typepad.com/news_releases/2019/09/tpl-and-the-ttc-partner-to-launch-campaign-to-provide-free-ebooks-to-commuters.html)

In addition to this TTC and TPL are providing complimentary public transport cards (PRESTO) to people who do not yet have one and may face challenges in purchasing one. This is a poverty reduction initiative to help make TTC more affordable for low-income Toronto residents.

<https://www.torontopubliclibrary.ca/services/presto.jsp>

Both of these offerings from TPL and TTC show the mutual benefits for the community of these macro level referral pathways. Additionally TTC benefits from value added customer service and increased satisfaction of service from commuters. TPL benefit from increased exposure to the community, increased memberships and increased digital collection usage.



Exploring  
new referrals

# Exploring new referrals: Sport

On weekends across the state families are heading out to kids' sport and volunteering their time on teams as team support or coaches. Many have limited or no understanding of how to coach and inspire a team of children.

At a **one-to-one** level the library can refer people to sporting clubs for increased connection, as players or volunteers. With strong relationships in place, sporting clubs can refer volunteer coaches to the library to check out books and other resources to support coaching.

At a **one-to-several** level a library could create a series of ***Better Coach*** seminars for coaches of all sports across their municipality. Libraries can use specialised collections to support volunteers building their skills, and can use community noticeboards to promote local tryouts and advertise for new volunteers.

At a **one-to-many** level a local library might engage local sporting groups in the community by extending their relationships through council departments for promoting the series and engaging influential coaches in the community to deliver the topics, such as:

- Coaching for performance
- Coaching through disappointment
- Coaching better humans

At a **one-to-all** level PLV might grow relationships with sporting bodies such as Football Victoria, Basketball Victoria, Netball Australia, Swimming Australia and encourage notable coaches in professional teams to offer community outreach work through the library system.

The outcome for libraries is new, unseen members of the community will experience the modern library and uncover the value it can provide them and their families.

“When the library builds partnerships, it strengthens the ties to its community, shares resources, and builds positive relationships with diverse stakeholders. Reaching out to initiate community partnerships begins with identifying both traditional and non-traditional partners and exploring new ways to work together. Effective collaborations are sustained through a shared commitment to serving the ever-changing needs of the community.”

<https://www.webjunction.org/explore-topics/partnerships.html>

## Exploring new referrals: Health



Neurodiversity and autism are the fastest-growing support packages assigned through the NDIS, especially among children. Families of children with autism are often isolated and overwhelmed, with few specialised support services available and almost nothing available for free.

At a **one-to-one** level, libraries can build relationships with local services including early years support services and broader support services. Storytime presenters and CYS staff are often approached by parents about specific developmental concerns and can refer families to local services.

At a **one-to-several** level, libraries can build on these relationships and refer out through programs such as Storytime, sharing information and inviting speakers. They can run programs like Sensitive Santa and Sensory Storytimes, in partnership with local providers, that support families. These programs bring people into the library and can also provide referrals out to support services.

At a **one-to-many** level, libraries can partner with councils, social enterprises, and disability support services. Referrals could come through outreach, programming, hosting carer's groups in library spaces.

At a **one-to-all** level, PLV could extend relationships with organisations such as Amaze, Aspergers Victoria, or Irabina to provide creative solutions for their local communities. This could include both increasing awareness of and pathways to these services through libraries and vice versa.

## Exploring new referrals: Private sector



Real Estate Agents are often the first connection someone has to their local community when they move in. They are uniquely placed to connect people to local services, including libraries, as part of their welcome packs. People who have recently moved to a new area are often actively seeking the kind of connection that libraries can provide, but may not think to look there.

At a **one-to-one** level, libraries can engage with agents in their area to let them know about resources available at their local libraries. Educating agents around services and resources that they can promote to prospective residents provides an opportunity for direct referrals from agents into our libraries.

At a **one to several** level, libraries could host programs that educate residents about real estate markets in their local area. The program could be targeted around growth areas in the local community and understanding sales trends or could be aimed at prospective sellers around dressing homes for sales and strategies to maximise sale prices. Libraries could invite local agents or stylists to take part. This could bring new people into the library, promoting membership and loans, as well as promoting real estate services to library users.

At a **one to many** level libraries can distribute marketing content to real estate agents in their area. Real Estate agents often produce newsletters that are sent to extensive databases that libraries could create shareable content for. Libraries can supply marketing collateral that could be included in new home packs for residents.

At a **one to all** level, PLV could engage with the Real Estate Institute of Victoria to include data around libraries and value that they offer to communities. PLV could speak at conferences advocating for partnerships that agents can nurture on a local level and develop property insight content that could be distributed through library channels.



Referrals out:  
front-line tools for staff

# Referrals out: front-line tools for staff

Referrals are all about connecting people to the information and services they need. Libraries are filled with passionate professionals who are highly trained to find and connect people with reliable information and who are skilled problem solvers. There are a range of ways library staff can provide a referral out: warm, cold and passive. However, it is important to note that library professionals need to maintain boundaries both for themselves, for the profession and importantly for the community members we serve.

Building on the work of the *Libraries for Health and Wellbeing – a partnerships toolkit - referral pathways*, in the following pages you will find four template toolkits for frontline library staff. Each toolkit covers a referral need topic that is common in libraries and it contains:

- a list of considerations for staff
- the key statewide services and their contact info and
- a space for libraries to add their own local services

The intention of these toolkits is for libraries to have a starting point for building their own directories, to help library staff maintain their professional boundaries and to provide libraries with some key organisations. These organisations have an abundance of information available for industries such as libraries who assist people in times of need and are an excellent source for staff training and development.

# Sample referral toolkit: Financial hardship

Should a person present with financial hardship some things to consider about your response to the issue are:

- Respect the right to confidentiality and privacy
- Financial counselling services are free, confidential, and independent
- Interpreters are available and there are no visa restrictions
- You can offer to make a warm referral (with your participant's consent). Or, if your participant wishes to self-refer, write the local financial counselling service contact details out for them

## Statewide Resources

---

<b>MoneySmart</b>	<a href="http://www.moneysmart.gov.au">www.moneysmart.gov.au</a> <a href="https://moneysmart.gov.au/managing-debt/financial-counselling">https://moneysmart.gov.au/managing-debt/financial-counselling</a> Enter a postcode to find a financial counsellor service nearby. The MoneySmart website also has Money Management Kits in 15 languages other than English: <a href="https://moneysmart.gov.au/publications/money-management-kit">https://moneysmart.gov.au/publications/money-management-kit</a>
<b>Financial Counselling Victoria</b>	<a href="https://fcvic.org.au">https://fcvic.org.au</a> Find a financial counselor and other services <a href="https://fcvic.org.au/library-professionals">https://fcvic.org.au/library-professionals</a> - specific for assisting library staff
<b>Ask Izzy</b>	<a href="https://askizzy.org.au">https://askizzy.org.au</a> - The financial section allows you to enter your postcode and find a financial counsellor service nearby
<b>National Debt Helpline</b>	<a href="https://ndh.org.au/">https://ndh.org.au/</a> Call 1800 007 007 to speak with a financial counsellor for free
<b>Financial Information Service – Centrelink</b>	To speak to FIS, call 132 300 and ask for an FIS officer <a href="http://www.servicesaustralia.gov.au/financial-information-service">www.servicesaustralia.gov.au/financial-information-service</a>
<b>Mob strong Debt Help</b>	Call 1800 808 488 <a href="https://financialrights.org.au/getting-help/mob-strong-debt-help/">https://financialrights.org.au/getting-help/mob-strong-debt-help/</a>

## Local resources are:

---

# Sample referral toolkit: Family Violence

Family violence – also known as domestic violence or abuse – is any abusive behaviour that is used to control someone in a family, family-like or intimate relationship, and makes that person afraid for their safety and wellbeing or the safety of another person. If a child witnesses abusive behaviour or is exposed to the impacts of this, they are a victim of family violence in their own right. Ref: safeandequal.org.au

Should a person present with issues concerning family violence:

- Show respect, convey belief and validation
- Value their knowledge and lived experience of violence, trauma, faith and culture
- Listen without interruption or judgement
- Respect the right to confidentiality and privacy while being clear on limits (if any) for example legal obligation in regard to risk and safety (including Child safety)
- Support their right to autonomy, agency and expertise in their decision making
- Provide information that will support them to make their own choices in what happens next

## Statewide Resources

<b>Safe and Equal</b>	Peak body for specialist family violence services that provide support to victim survivors in Victoria <a href="https://safeandequal.org.au/">https://safeandequal.org.au/</a> <a href="https://safeandequal.org.au/find-a-service/">https://safeandequal.org.au/find-a-service/</a>
<b>The Orange Door</b>	<a href="https://www.orangedoor.vic.gov.au/">https://www.orangedoor.vic.gov.au/</a> Monday - Friday 9am-5pm a free service for adults, children and young people <a href="https://www.orangedoor.vic.gov.au/find-a-service-near-you">https://www.orangedoor.vic.gov.au/find-a-service-near-you</a>
<b>Safe steps</b>	Call 1800 015 188 - 7 days a week 24 hours <a href="https://www.safesteps.org.au/">https://www.safesteps.org.au/</a> For women and children.
<b>Victims of crime Helpline</b>	Call 1800 819 817 or text 0427 767 891 - 7 days a week 8am-11pm <a href="https://www.victimsofcrime.vic.gov.au/">https://www.victimsofcrime.vic.gov.au/</a>
<b>Rainbow Door</b>	Call 1800 729 367 or text 0480 017 246 <a href="https://www.switchboard.org.au/rainbow-door">https://www.switchboard.org.au/rainbow-door</a> For LGBTIQ+ people and their friends and families
<b>Dijarra</b>	Call 1800 015303 Monday - Friday 9am-5pm <a href="https://dijarra.org.au/contact-us/">https://dijarra.org.au/contact-us/</a> For Aboriginal people provides legal and non-legal support services
<b>InTouch</b>	Multicultural Centre Against Family Violence Call 1800 755 988 - Monday to Friday 9am -5pm <a href="https://intouch.org.au/">https://intouch.org.au/</a>

## Local resources are:

# Sample referral toolkit: Online Safety

Online safety includes issues such as cyberbullying, adult cyber abuse, image-based abuse, technology-related concerns for people at risk of family or domestic violence, and a range of scams.

Should a person present with an online safety issue consider the following:

- Respect the right to confidentiality and privacy
- Assessing if the person can provide informed consent and referring to specialist services if needed. For example if not able to provide consent they may require legal support and the support of an identified support contact

## Statewide Resources

---

<b>ScamWatch</b>	<a href="https://www.scamwatch.gov.au/">https://www.scamwatch.gov.au/</a> <a href="https://www.scamwatch.gov.au/get-help/where-to-get-help">https://www.scamwatch.gov.au/get-help/where-to-get-help</a> covers a range of types of incidents and where to report and get help.
<b>eSafety Commissioner</b>	<a href="https://www.esafety.gov.au/">https://www.esafety.gov.au/</a> a range of help with sections for Parents, Young People, Seniors, LGBTIQ+, Women, Educators and communities. It covers being safe online to how to get help. Providing information in other languages and importantly a way to report abuse. <ul style="list-style-type: none"><li>• eSafety for First Nations <a href="https://www.esafety.gov.au/first-nations">https://www.esafety.gov.au/first-nations</a></li><li>• eSafety for Kids <a href="https://www.esafety.gov.au/kids">https://www.esafety.gov.au/kids</a></li><li>• Key issues <a href="https://www.esafety.gov.au/key-issues">https://www.esafety.gov.au/key-issues</a></li></ul>
<b>Australian Centre to Counter Child Exploitation</b>	Decision chart – How and what to report for online child sexual exploitation - <a href="https://www.accce.gov.au/report">https://www.accce.gov.au/report</a>
<b>Fraud and theft</b>	Your local police - call 131 444 or local police Station
<b>Stolen identity IDCARE</b>	<a href="http://www.idcare.org/">http://www.idcare.org/</a> or call 1800 595 160 Free government-funded service that develop a specific response plan to your situation and support you through the process.
<b>Victims of crime</b>	<a href="#">Victims of Commonwealth identity crime</a> Online application for a certificate to support your claim that you've been the victim of identity crime and can be used to help re-establish your credentials with government or financial institutions.
<b>Cybercrime</b>	<a href="https://www.cyber.gov.au/report-and-recover/report">https://www.cyber.gov.au/report-and-recover/report</a>

## Local resources are:

---

# Sample referral toolkit: Homelessness

The causes of homelessness are often misunderstood. A chronic shortage of social housing, an increasingly unaffordable private rental market, and inadequate income support means that thousands of Australians struggle to find a secure and affordable place to live. In Victoria, the top three reasons for people seeking homelessness and housing assistance are financial difficulties, family and domestic violence, and the housing crisis.

Ref: [chp.org.au](http://chp.org.au)

Should a person present with issues concerning homelessness:

- Show respect and empathy
- Respect the right to confidentiality and privacy
- Support the person's right to autonomy, agency and expertise in their own decision making
- Value their knowledge and lived experience
- Ensure your own safety and maintain boundaries

## Statewide Resources

---

### **Council to Homeless Persons**

Peak body representing organisations and individuals in Victoria with a commitment to ending homelessness <https://chp.org.au>

---

### **Launch Housing**

<https://www.launchhousing.org.au/get-help> Assistance for those that are homeless, at risk of homelessness or escaping family violence, call 1800 825 955 - 24 hours, statewide, toll-free number.

---

### **Ask Izzy**

<https://askizzy.org.au> - The Housing section allows you to enter details and find a service nearby

---

### **Salvation Army Homelessness Support Service**

<https://www.salvationarmy.org.au/need-help/homelessness-support-services/> Localised services across the State 13 SALVOS

---

## Local resources are:

---

# Acknowledgements

This work was undertaken as part of the State Library of Victoria's *Shared Leadership Program 2023*. Special thanks to Nadyne Eggleton and Jacqui Horwood of the State Library for their support.

## Project Team

**Project Idea:** Angela Savage, Public Libraries Victoria

**Project Sponsor:** Subha Simpson, Geelong Regional Libraries

### Project Workgroup:

- Analise Wright, Mornington Peninsula Libraries
- Ayden Said, Brimbank Libraries
- Corrie Ambrose, City of Melbourne Libraries
- Kate Ferguson, Yarra Plenty Regional Library
- Vivienne Fox, Greater Dandenong Libraries