

# Tips on making effective referrals

## Tips on Making Effective Referrals in Academic Advising

To celebrate NACADA's 25th anniversary, we revisit classic articles from the archives of the *Academic Advising News*. This article originally appeared in issue 14(2), April 1992.

Jack Roundy

Director of Academic Advising

University of Puget Sound

---

We in academic advising depend a great deal on faculty and staff in other departments to help us serve our advisees. But we also know the frustration of trying to help students make effect contacts in other departments, and seeing our attempts fail. Here is a set of tips on making effective referrals, tips that can results in a higher success rate in this area:

1. Inform yourself of campus resources thoroughly, paying particular attention to the names of contact people and the chain of command in various offices. (Ultimately you will develop an invaluable sense of which people in each area are most helpful and responsive.)
2. Keep a list of names, offices, and telephone numbers (2004 Editorial addition: and email addresses) at hand for quick reference.
3. When talking with students, pay particular attention to their expressed and implied needs. Often students won't ask to be referred for help, but they very much need referral. For example, they may express anxiety about their financial affairs without asking for assistance; a referral to Financial Aid or student employment may be called for if you probe further.
4. Do your best to find the right referral. Student may sometimes focus their concerns in an area that is less crucial to their needs than another. For example, students may express anxiety about whether the registrar will let them withdraw from a class late in term. The appropriate referral, however, is to the instructor of the course, whose prerogative it is to decide whether a withdrawal can be allowed. It goes without saying, that you must have a clear idea of university policies and procedures to settle on the right referral.
5. Students are often uneasy about following through with a referral. Try to make them comfortable with the idea, pointing out the friendliness, accessibility, and helpfulness of the people you are sending them to. This task can be crucial in the case of faculty and upper-level administrator referees, since students often find these people intimidating.

6. Try to keep the chain of referrals as simple as possible. Often students will have to visit several offices to complete referral procedures. Help students reduce the 'runaround' by finding ways to eliminate steps. Also work out with students a proper sequence of steps, so that they don't have to backtrack to accomplish their ends.
7. Help student draw up agendas for referrals. Have them jot down (or jot down for them) crucial questions and procedures for getting the most of their visits with the people to whom you send them. Make notes about referrals, indicating what the referral was intended to accomplish, so that you can refresh yourself for future interviews.
8. Facilitate referrals by telephoning the parties to whom you are sending students while those students are with you. Telephoning can be helpful in two ways: it can help you to be sure that you are sending students to the right people for help, and it can give you the opportunity to make an appointment for the students on the spot, which will dramatically improve the contact rate for referrals. In fact, a good strategy for referrals is to make telephone calls and then hand the receiver to your students, encouraging them to set up appointments themselves.
9. When you make referrals, jot down notes in your advising files that will remind you to ask students on their next visit about the results of their contacts. If students report that they haven't followed through, find out why not, and discuss the reasons. See if you should make a different referral, or if you need to become more involved in ensuring contact. Don't take the process over from your students, however, since it is their responsibility to see that their needs are met.
10. Check your records every so often to get a sense of the referrals you have made. Student development is an ongoing process, and patterns of need and growth can be observed in the sequence of referrals you have made. Need for further direction can often be discovered in the referrals you have already made.

Need more resources? Try the *Clearinghouse's* referral resources

Posted in: Advising Students