



Referral Resource Guide Development Tool

Creating a one-stop shop for referral network information

There are often many referral resources to keep track of for HIV prevention, care, and treatment services. Building a robust referral network and resource guide is key to connecting clients with critical services and resources that support whole-person health. A resource guide provides a one-stop shop listing of current, accurate, and relevant information a client will need to stay engaged and in contact with services and support resources. Building a resource guide involves compiling relevant information and organizing it in a clear, easily accessible format.

1. Gather Relevant Information

- **Scope:** Decide what services and geographic areas the guide will cover. Be specific about the types of resources to include, ensuring they are relevant to your client's needs.
- **Identify Sources:** Look for trusted and vetted sources.

2. Categorize the Resources

Organize the resources by type of service. Break the guide into categories based on the subject matter, such as sexually transmitted infections testing, transportation, support groups, insurance navigation, career development, or mental health.

This will help users quickly find what they are looking for by the type of service provided.

3. Verify and Vet the Resources

- **Accuracy:** Ensure all the information is up-to-date and accurate by visiting each resource's website, verifying correct links, and confirming contact details.
- **Credibility:** Attempt to ensure the resources are reputable.
 - Vetting all organizations may not be possible depending on the number of resources in the guide.
 - Highlight resources with a positive reputation for effectively serving the client population either from feedback from clients or from the views expressed on the resource's website.
 - Exclude resources that frequently receive negative feedback from clients or have negative views of the intended client population on their website.

4. Create Descriptions for Each Resource

- For each resource include:
 - **Name**
 - **Type**
 - **Contact Information** (phone number and email)
 - **Website URL**
 - **Street Address**
 - **Hours of Operation**

- **Key Features:** Highlight any unique aspects of the resource (e.g., free access, special programs or specialized services/list of services, type of insurance taken, languages spoken).
- **Intended Audience:** Indicate who would benefit most from this resource.
- **Eligibility Criteria:** Highlight any unique eligibility requirements that exist for a resource.

*Add other unique information that may support staff in providing a successful referral or would be helpful for clients as they navigate whole-person health services.

5. Organize the Layout

- **Table of Contents:** Include a table of contents at the beginning of the resource to help users navigate through different sections of the guide.
- **Search Functionality:** If the guide is online or digital, implement hyperlinks, a search bar, and filters (if possible), to help users quickly locate specific topics within the guide.
- **Simple and Clean Layout:** Ensure the guide is easy to follow. Use headings, subheadings, bullet points, numbered lists, and visual aids for readability.
 - Consider grouping resources by type of services, and/or neighborhoods.
- **Interactive Features:** For online or digital guides, include clickable links and resources that lead users directly to the website.

6. Include Accessibility Features

- **Language:** Make sure the guide is written in clear, simple language. Avoid jargon unless necessary.
- **Design:** Use large fonts, high contrast, and well-organized sections for easy navigation.

7. Review and Test the Guide

- **Peer Review:** Have someone on the team review the guide for errors, clarity, and usability.
- **Test Links and Resources:** Ensure all links are working and resources are still available.
 - To ensure links in the guide remain accessible, it is best to link to the webpage the resource is hosted on versus using the actual resource link (i.e. if resource is a PDF). This can assist with accessing the resource even when it gets updated and the actual resource link may change.
- **User Feedback:** If possible, ask community users for input and feedback to make sure the guide meets their needs and is user friendly.

8. Update

- **Update Regularly:** Plan to review the guide regularly (e.g., annually, biannually, or quarterly) and make updates as needed to keep the resources relevant and up-to-date (especially website links).
 - If the guide is large, consider splitting it into sections for review and/or dividing sections among staff for review.
 - To help track updates, develop a spreadsheet that lists the resources (name and URL) with columns for last review date, resource still live (yes/no), notes, and reviewer name.

9. Promote the Guide

- **Announcement:** Promote the guide internally and with any relevant stakeholders or partners. Develop a plan for ongoing promotion and dissemination of the guide.
- **Encourage Feedback:** Ask users to share suggestions or comments for future updates.

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