# Best Practices for Community Resources

With the introduction of Collaborative Defense, offices are encouraged to look toward their local networks and build a web of providers to meet client service needs. This can be achieved through comprehensive resource mapping that identifies possible community partners that can address client needs. Once these organizations are identified, they should be compiled into a resource guide that serves as a centralized tool customized for service providers in a given jurisdiction.

In order to deepen the impact of the amassed resources, client services staff can formulate relationships with valuable providers that streamline social service or civil legal referrals and increase the reliability of external support for client needs. These best practices provide suggestions for resource mapping, maintaining updated resource guides, and building external partnerships that can be leveraged for client service delivery.

## Resource Mapping

In order to develop strong partnerships with community organizations, staff must first survey the local landscape of social and legal services. This process consists of compiling any current or past resources the office has used, reviewing any current or past points of contact for those resources, and researching potential new partnerships in the community.

* Determine what kinds of services you are looking to refer clients to. Based on your predefined scope of services, identify what kinds of organizations you are seeking to partner with and what types of services your clients demonstrate the most need for.
* Review and gather any existing compilation of resources that your office already maintains. This can include information found in digital or paper files, flyers from community organizations, oral knowledge from long-time staff, post-it notes, or old case notes, for example.
* Reach out to the compiled current contacts or any service provider that is known to have assisted clients in the past. Determine whether or not the contact is still active. Inquire about their current referral process and if a partnership is still possible. If not, ask them if they know of any other organizations that could provide comparable services.
* The internet is your friend! Use a web search website to find service providers in your area by searching in your specific municipality, county, state, etc. Some jurisdictions may also have online compilations or directories of resources for low-income people.
* Reach out by phone. Talking to a person who works there is usually the best way to get a clear picture of a service provider’s scope of practice. Many websites can be out of date and may not reflect current offerings.
* Use the provided form to ask about service offerings and explore the possibility of a partnership.
* Ask existing partners about other providers in the region that might also be interested in forming a partnership for client services. Many community organizations have robust networks that can be incredibly useful while mapping your guide.

### Creating a Resource Guide

Once you have surveyed and compiled a list of the resources you plan to use, it is critical to organize them in a clear, accessible format that all staff can easily utilize and update as needed. This looks different to every office and requires that staff customize the guide to suit their respective needs, resource levels, and technological acuity.

* Find a software tool that works for you. Depending on your office’s preferences, there are many different formats a resource guide can take. A digital spreadsheet, similar to the example found in this toolkit, clearly shows what resources are available, have been successfully used, and how to properly refer clients to them. While this type of format is not necessarily required, a resource guide should streamline service delivery so that client services staff can efficiently and effectively address client needs.
* Delegate a specific person to work on the guide and keep it up to date. Resource guides that fall out of date or are not given the proper attention are frequently unused and offices resort to old tactics of individually compiling resources.
* Be mindful of who has access to the resource guide. If this is intended to be shared with other organizations, such as parole, for example, make sure that the notes in the guide do not include any client-specific information or any language that is not meant to be seen by people outside of your office.

## Maintaining an Updated Resource Guide

An equally important component of resource guide development is the maintenance of the tool beyond its inception. Consistent and diligent maintenance of the guide ensures its longevity, utility, and the practicality of its creation. This upkeep requires staff to regularly check in with the listed providers to confirm their scope of services, referral processes, and preferred method of contact.

* Given the magnitude of maintaining the resource guide, one or more staff members should be assigned to oversee this process to ensure oversight and regular attention.
* The guide should be a central place that all staff feel comfortable adding to and utilizing for referrals. To facilitate familiarity with the guide, offices should train staff on the uses, processes, and formats for adding new contacts and finding resources (e.g., what certain filters mean, how to add new entries, what notes to put in certain sections, etc.).
* Staff, specifically those assigned to update the resource guide, should verify external contact information regularly and ensure that community partners are primed to notify your office if there is any change in their referral process or staffing structure that affects service delivery
* If staff learn that a contact has changed or a community provider is no longer available, that resource should be updated and/or removed from the guide, either by the staff member who noticed it or by the staff member charged with maintaining the guide. Staff should be notified of any removals.
* Even if staff are not the primary person responsible for maintaining the resource guide, all team members should still be expected to actively search for new partners and expand service delivery connections for the office.
* As staff use resources, the guide should provide space for the staff to note their most recent contact and quality of experience with the provider. This allows other staff members to see what organizations are available for referrals and tap on colleagues to learn more about their experience with recent client referrals.

When new client services staff come on board, we suggest encouraging them to secure or review 5-10 contacts for the resource guide as part of their training. This allows staff to familiarize themselves with local partners, practice critical communication skills with external stakeholders, and build upon existing resources that they will be expected to utilize in their role.

## Building Partnerships with External Providers

The creation of a comprehensive and useful resource guide relies on the existence of stable working relationships with community organizations that offer a wide range of services. This requires that staff reach out to local providers and establish strong relationships. It also demands that staff develop a thorough understanding of various community providers so that they can refer clients accordingly and tap into the relevant resources when needed.

### Defining the Partnership

* In order to form a strong and durable partnership with a community organization, it is important to understand a collaborator’s scope of work well so that you can tailor your needs to what they can offer your client.
* Public defense offices should consider what is needed to get the most out of a partnership with a specific provider when initiating a relationship.
* Asking providers about their scope of services can save time in the initial stages of the partnership because it can ensure staff will not be referring clients for services that partners cannot provide.

### Partner Meetings

* When first meeting with a potential partner, staff should gather as much information about what services the organization provides and what populations they serve. This is also a chance to determine whether or not your clients will be eligible for services. For example, if an organization does not work with formerly incarcerated individuals or people with open court cases, it may not be worthwhile to pursue a partnership.
* Identify opportunities for collaboration by asking about their referral process and ways that they can provide services for your clients. Inquire about previous partnerships with your office and outline mechanisms to improve or maintain a positive experience with defender staff.
* Streamline access to services by asking about requirements for client engagement (e.g., a specific type of identification is needed), referral process and forms, current capacity and limitations to consider (e.g., how many available beds a shelter has), and points of contact.
* Offer opportunities to support the organization such as attend an event hosted by them or share fliers that advertise their service menu. No partnership is one-way and this may enable a prolonged collaboration between you and the partner.
* Resolve concerns that you or the external provider may have about the partnership. Create space in the meeting to discuss any barriers that may arise or limitations on what either party can offer.
* Finally, use this conversation as a chance to build rapport and begin a productive working relationship with a community partner. As many providers are stretched thin by the demand for services, be respectful and grateful for the time they are devoting to speak with you. Many client services staff resemble those employed at the defender’s office, which can facilitate points of bonding between providers. This initial interaction can set a precedent of mutual support between you and the partner.