

REFERRAL & COORDINATION PLAN TEMPLATE

I. Self-Help Center Referral

- A.** What customers will the court's self-help center refer customers to community legal services? Who will be receiving which referrals?
 - i. Case Types
 - ii. Service level needs
 - iii. Other Criteria
- B.** What types of referral needs will still be left unmet for self-help center customers?

II. Legal Service Referrals

- A.** When will the community legal service providers refer individuals to the court's self-help center?
- B.** What customers will the community legal services be referring to other community legal services? Who will be giving and receiving which referrals?
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III. Coordination Strategy

- A.** How will on-going communication be maintained between the self-help center and community legal services?
- B.** Will there be any kind of coordinated intake protocol?
- C.** Will schedules of clinics, workshop, etc. be shared?
- D.** Will instructional material be shared?
- E.** Will there be any combined trainings for staff?
- F.** Will there be any sharing of language access ability or translations?

SERVICES CHART

Court Self-Help Center		Legal Services		Pro Bono Program		Lawyer Referral	
AREA OF LAW	LEVEL OF SERVICE	AREA OF LAW	LEVEL OF SERVICE	AREA OF LAW	LEVEL OF SERVICE	AREA OF LAW	LEVEL OF SERVICE
Fam. L	Self-Help (SH)	L/T	Advice & Counsel(A/C) or Full Rep. (FR) Tenants only	DV – victims only	Unbundled	Guard	FR – fee Modest means
Civil	SH	Elder Abuse	FR	Guard.	Pet. only	Fam. L	same
Landlord/Tenant (L/T)	SH	DV – Victims only	FR			Civil	same

AGENDA:

I. Fill in Chart – Begin Discussion

II. Services – Who does what?

A. Gaps in Services - Suggestions

III Referrals – Who can refer to who?

A. Historical Issues

B. Referral Plan Development

C. Exchange of Current Contact Information

IV. Resources

A. Materials to Share

B. Coordinated Trainings

V. Next Steps

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