

Kings/Tulare Smart Referral Network Alliance Meeting – Summary

Main Focus of the Meeting

The meeting focused on **SRN updates, partner onboarding, the transition to SRN 2.0, and how agencies are using the Smart Referral Network to make and track referrals**. The panel discussion provided practical feedback from KCAO and 211 Kings County on what is working well and what challenges partners are experiencing.

SRN Program Updates

- **Kings County is transitioning to SRN 2.0.**
 - Partners are being supported as they learn how to navigate the new system.
 - The transition is an important focus for the Kings County SRN team.
 - **Tulare County is continuing partner onboarding.**
 - The Kings/Tulare Homeless Alliance is being onboarded.
 - The next step is to determine the appropriate **referral workflow** for the organization.
-

SRN Panel Discussion

The panel included representatives from **KCAO and 211 Kings County** who shared their experiences using SRN.

What Partners Are Finding Helpful

KCAO

- Staff initially felt that the system was somewhat overwhelming.
- Once staff began creating client profiles and searching for services, they found the system easier to navigate.

- SRN is being used to help document referrals and connect families with available resources.
- Common referral needs include **rental assistance and internal referrals between departments**.

211 Kings County

- SRN is considered relatively easy to use.
 - Staff can search for clients and review available services.
 - SRN also helps staff identify other agencies that may provide similar or complementary services.
 - The system provides more visibility into what happens **after a referral is made**.
-

Referral Process

The panel discussed the difference between **creating a client profile** and **submitting a referral**.

- Creating a new client profile can take approximately **10 minutes**, depending on the amount of information that needs to be entered.
- Once the client profile already exists, **sending the actual referral is much quicker**.
- Having accurate client information available helps make future referrals easier.

Main Barrier Identified

One of the biggest challenges discussed was obtaining the required **acknowledgement/consent form from families**.

When the required acknowledgement is not completed:

- Staff may be unable to move forward with the SRN referral.
 - Staff may instead provide information manually to the family.
 - This can make it more difficult to track whether the client ultimately connected to services.
-

Referral Tracking & Outcomes

A major discussion point was the value of tracking what happens **after a referral is sent**.

SRN can help partners identify:

- Whether a client connected to services
- Whether the referral was unsuccessful
- Why a client may not have connected
- Where additional follow-up may be needed
- What services are being accessed by clients

The discussion also raised a question about **how much outcome information is available for programs that primarily use SRN for documentation rather than ongoing case management**.

Employee Giving Presentation

John Adams also provided an overview of **employee giving/payroll deduction**.

The presentation explained that employees can contribute small amounts, such as **\$5 or \$10 per paycheck**, through payroll deduction.

Key points included:

- Makes charitable giving easier and more consistent.
- Allows employees to support local community needs.
- Employees can select specific causes or organizations.
- Examples of local organizations supported through United Way efforts include **KCAO, The Salvation Army, Kings Partnership for Prevention, and Lemoore Christian Aid**.

Follow-Up

John will provide the employee-giving presentation to Maria, who will distribute it along with the meeting recording.

Main Takeaways for SRN Partners

1. SRN 2.0 transition remains a major focus.

Kings County partners are continuing to receive support as they move into the new system.

2. New partners are being onboarded.

The Kings/Tulare Homeless Alliance is working through the process of establishing its SRN referral workflow.

3. SRN is being used for more than sending referrals.

The network can help partners track what happens after a referral and identify barriers to accessing services.

4. Consent/acknowledgement continues to be an important referral requirement.

Obtaining the required documentation from clients can be a barrier for some programs..

5. Outcome tracking is important.

Consistent referral updates help the network understand whether clients are successfully connecting to services.