

Pastoral Care Referral Process Guide

A short implementation guide for establishing your church's local referral process.

The church determines the local referral process.

AFFINITY™ provides the framework and the Pastoral Care Referral Form. Your church determines which community resources it will use, who may make referrals, how referrals are made, and how follow-through is handled.

What AFFINITY™ Provides

The AFFINITY™ training teaches your team how referral fits into the pastoral-care system. The Pastoral Care Referral Form gives the church a consistent way to document a referral when a person needs a resource, professional support, or community support outside what the church can provide.

What AFFINITY™ does not determine is the church's local referral network. That information is specific to your community, your relationships, your available resources, and your church's own decisions.

Your Leadership Team Must Establish the Local Referral Process

Before the church begins using the referral form, sit down with the appropriate leadership or pastoral-care team and establish the local process together.

1. Identify community resources

Create a working list of organizations, professionals, agencies, programs, and other resources in your community that may be appropriate for the needs your church encounters.

2. Determine which resources your church will use

Review the resources as a team. Consider existing relationships, professional qualifications, accessibility, location, cost or eligibility requirements, cultural and faith considerations, and the kinds of needs the resource can address.

3. Identify existing partnerships and referral relationships

Document organizations or professionals with whom the church already has a relationship or established referral connection. A formal partnership is not required for every referral, but the church should know which resources it is comfortable identifying or using.

4. Decide who may make a referral

Establish which pastoral-care roles or leaders are authorized to provide referral information, make referrals, complete warm handoffs, or contact outside providers on behalf of a person.

5. Establish how referrals are made

Decide what your normal process will be: providing resource information, assisting the person with contact, completing a warm handoff, or another approved method. Follow your church's applicable privacy, consent, and documentation requirements.

6. Establish follow-through expectations

Decide when the church will follow up with the person, when continued pastoral support is appropriate, and when collaboration or additional connection may be needed after the referral.

Use the Referral Form After Your Process Is Established

The Pastoral Care Referral Form documents the referral after the church has determined that an outside resource, professional, organization, agency, or community support is appropriate.

The form is not intended to create the church's referral network for you. It records the decision and connection using the process your church has established.

Your Completed Referral System Should Answer These Questions

- Which outside resources can our church appropriately identify or use?
- Which resources have an established relationship or partnership with our church?
- Who is authorized to make or facilitate a referral?
- What information does our church provide to the person?
- When do we assist with contacting the resource or complete a warm handoff?
- What privacy, consent, and documentation requirements apply?
- When does the church follow up after the referral?
- What happens when a resource is unavailable, inappropriate, or does not meet the person's need?

Implementation Check

Before using the form, our leadership team has identified the community resources we are prepared to use.

We have established who may make or facilitate referrals.

We have established our normal referral and follow-through process.

We know where to maintain the completed referral documentation according to our church's approved recordkeeping process.

Remember: AFFINITY™ provides the professional structure. Your church supplies the local knowledge—your community resources, relationships, referral contacts, approvals, and process.