



Tips for Identifying Organizations for Partnership or Collaboration

If your organization is looking to build relationships with individuals or organizations in the community, here are a few helpful tips to keep in mind.

- 1. Identify the subject areas in which a referral resource or partnership may be required or helpful.** Think through any circumstances in which you are required to provide consumers with referrals, as well as the types of questions consumers have and areas where they might need assistance that would make it easier for them to apply and enroll. For example, other organizations might provide services that would make receiving Marketplace application assistance easier for consumers (e.g. free parking or use of computers at an outreach event). Brainstorm a list of organizations, businesses, and individuals in your community that can provide the type of assistance that would make it easier for some consumers to apply for and enroll in coverage.
- 2. Develop a list of objective criteria for evaluating a potential resource and referral or collaboration partner.** As discussed, to ensure that you are providing fair and impartial referrals, your organization must apply the same list of objective criteria to each outside individual or organization that you consider as a potential referral or collaboration partner. In addition to applying a list of objective criteria, you should also take consumer's best interests and expressed interests, needs, and desires into consideration when evaluating outside organizations. Included below are some examples of criteria that your organization might find helpful in developing its own list. A few questions you should consider are:
 - ☞ Does the organization or person have a direct financial relationship with health insurance or stop loss insurance issuers or a financial incentive to enroll consumers into a specific health plan or coverage? If so, additional guidelines may apply to your referrals. For more information, please see [Information and Tips for Assisters: How and when to provide information about agent and broker services to consumers, and other information about engaging with agents and brokers.](#)
 - ☞ Is the organization or person licensed, certified, or accredited by a government entity or professional organization and is the organization's or person's license, accreditation, and/or certification in good standing? This check should be updated periodically.
 - ☞ For required referrals, is the organization or person legally required to provide fair, accurate, and impartial information and/or is this requirement a condition of its professional licensure, certification, or accreditation?
 - ☞ Is the organization or person easily accessible by consumers who seek your services (e.g., is it in the same local area or close to public transit)?
 - ☞ Does the organization or person provide services that are accessible to people with disabilities or limited English proficiency?



- ☞ Does the organization or person provide services in a way that is culturally competent for the population(s) you serve?
 - ☞ Does the organization or person have policies and practices in place to protect consumers' personally identifiable information (PII)?
 - ☞ Does the organization or person offer products or services that the consumer can afford or that are at no cost to the consumer?
 - ☞ Does the organization or person require payment upfront from its clients?
 - ☞ Have former or current clients reported having been helped by this organization or person?
 - ☞ What is the organization's or person's reputation/standing in your community? Try looking up the organization's or person's listing with entities like the Better Business Bureau.
3. **Get to know the potential outside organization.** If you are unfamiliar with an organization, business, or individual, get and check references and professional credentials. Screen the organization or person against your evaluation criteria identified in Step 2. If a person or organization seems to be a good fit, consider scheduling a face-to-face meeting. Explain what your assister organization does and the reason you would like to collaborate with the person or organization. Try to get a better understanding of the work they do and how your consumers can be served by them. Identify a key contact for referrals and keep an open line of communication.
4. **Create a list of the persons and organizations** you have decided to partner and collaborate with so it is readily available when working with consumers. If a consumer asks, be prepared to explain how you decided to include persons and organizations on the list (for example, if you checked licensure or other credentials, you might want to indicate that you did so and when you last checked). Check in with the organizations on the list periodically to ensure you have the right contact information and that their professional licenses, accreditations, or certifications (if applicable) remain in good standing. You may want to also follow up with consumers to see how their experience was with the organization that you referred them to. This will help ensure that you are partnering and collaborating with reliable organizations.