



## Participant Referral Form

Participant's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Participant's Address: \_\_\_\_\_  
Street Address City State Zip Code

Participant's Phone Number(s): \_\_\_\_\_

Referral Source Agency: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Referral Source Contact Phone #: \_\_\_\_\_

How many in the household? \_\_\_\_\_

Participant meets the following criteria (check all that apply):

\_\_\_\_\_ Is below 185% of the federal poverty guidelines and receives public assistance

\_\_\_\_\_ Does not receive disability assistance or wants to discontinue disability assistance

\_\_\_\_\_ Is not in major crisis (untreated mental illness or drug/alcohol addiction, domestic violence situation, homeless); major crises have been stabilized

\_\_\_\_\_ Participant has given permission for UWSCNE staff to talk to a referring source about the participant's life situation, strengths and barriers.

\_\_\_\_\_ Is willing to work with others to become self-sufficient, i.e., independent of public assistance

Brief description of current strengths/barriers: \_\_\_\_\_

*Note: Potential participants must also complete and submit an application.*

### Which model fits best:

**Recommended for Prosperity Coach Model:** Best for one-on-one support especially for individuals recently out of crisis. Meet weekly with a Prosperity Coach for three months and then less frequently over time. **Send this referral to Erin Trausch: [navigator@unitedwayscne.org](mailto:navigator@unitedwayscne.org) | 402-461-8418**

**Recommended for Circles Model:** Best for individuals who are more stable and currently able to pay most usual bills. This model is cohort-based and begins only a few times each year, starting with three months of required weekly classes with other participants to strengthen financial literacy, goal setting, career planning and more (childcare and dinner provided throughout). Then "Circle Leaders" are matched with volunteer allies and continue to meet regularly to support a strategic plan to greater prosperity. **Send this referral to Erin Trausch: [navigator@unitedwayscne.org](mailto:navigator@unitedwayscne.org) | 402-461-8417**

**Any questions please contact Erin**