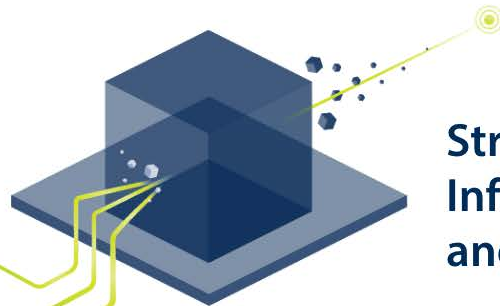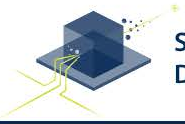# From Implementation to Refinement – An Action-Oriented Project Management Approach to CES Refinement

Danielle Bagg Wireman
Matt Holland
Coalition for Homelessness Intervention and Prevention (CHIP)

Streamlining Data to Inform Decision Making and Break Down Barriers

Agenda

- Indianapolis CES History
- Project Management Approach
- CES Refinement Workshop
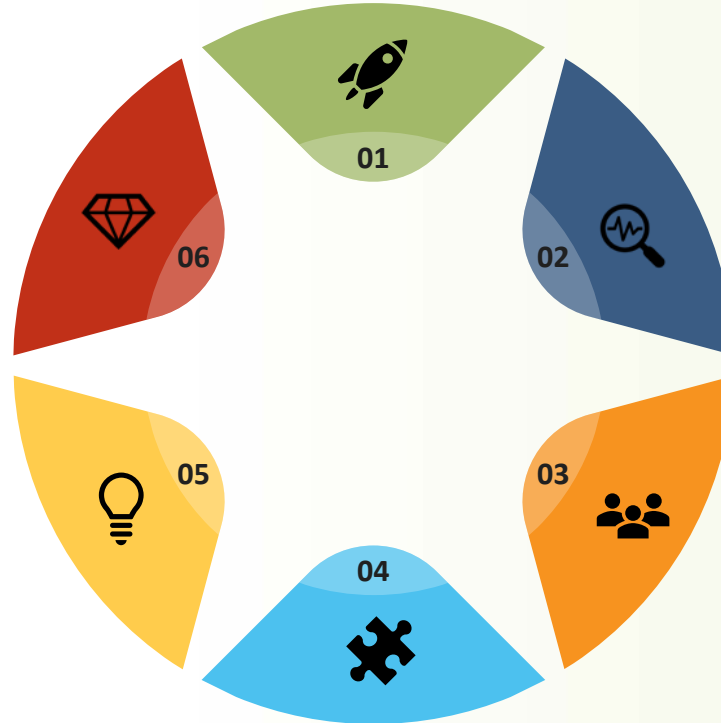- CES Refinement Workgroup Example

National Human Services Data Consortium
NHSDC

Streamlining Data to Inform
Decision Making and Break Down Barriers

2020 Fall Conference

October 2020

Indianapolis Coordinated Entry System

Shelter Coordination

ESG & Veteran Projects

CoC Projects

01

02

03

04

05

06

Launched July 1, 2017

CHIP HMIS & CES Lead

No-wrong Door

3

National Human Services Data Consortium
NHSDC

Streamlining Data to Inform
Decision Making and Break Down Barriers
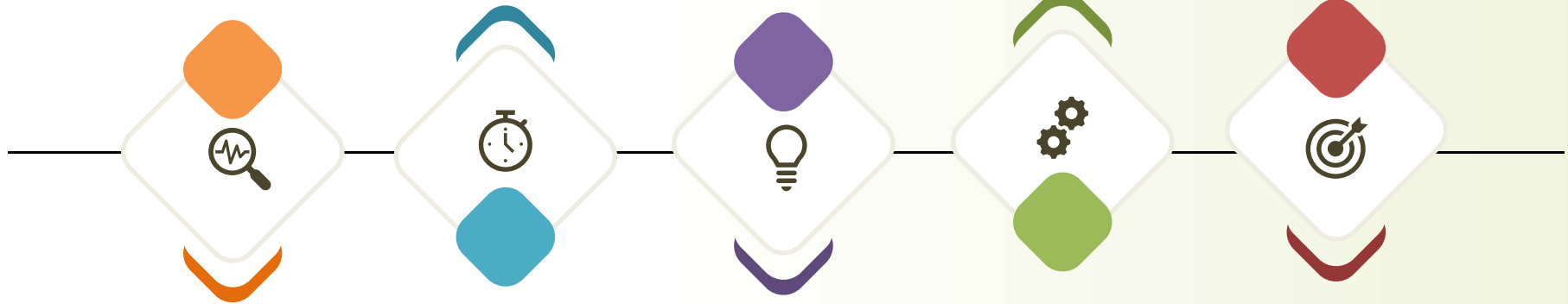
2020 Fall Conference

October 2020
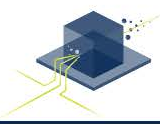
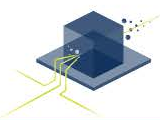# Basic Components of Project Management

Identify Needed Resources

Recruit Effective Participants

Provide a Framework for the Project's Activities

Negotiate with Higher Authorities
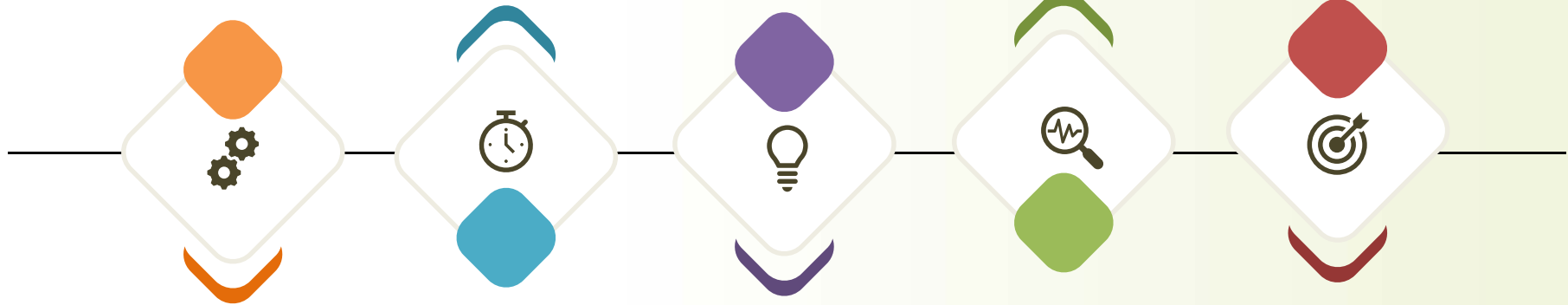
Set Milestones

4

Basic Components of Project Management

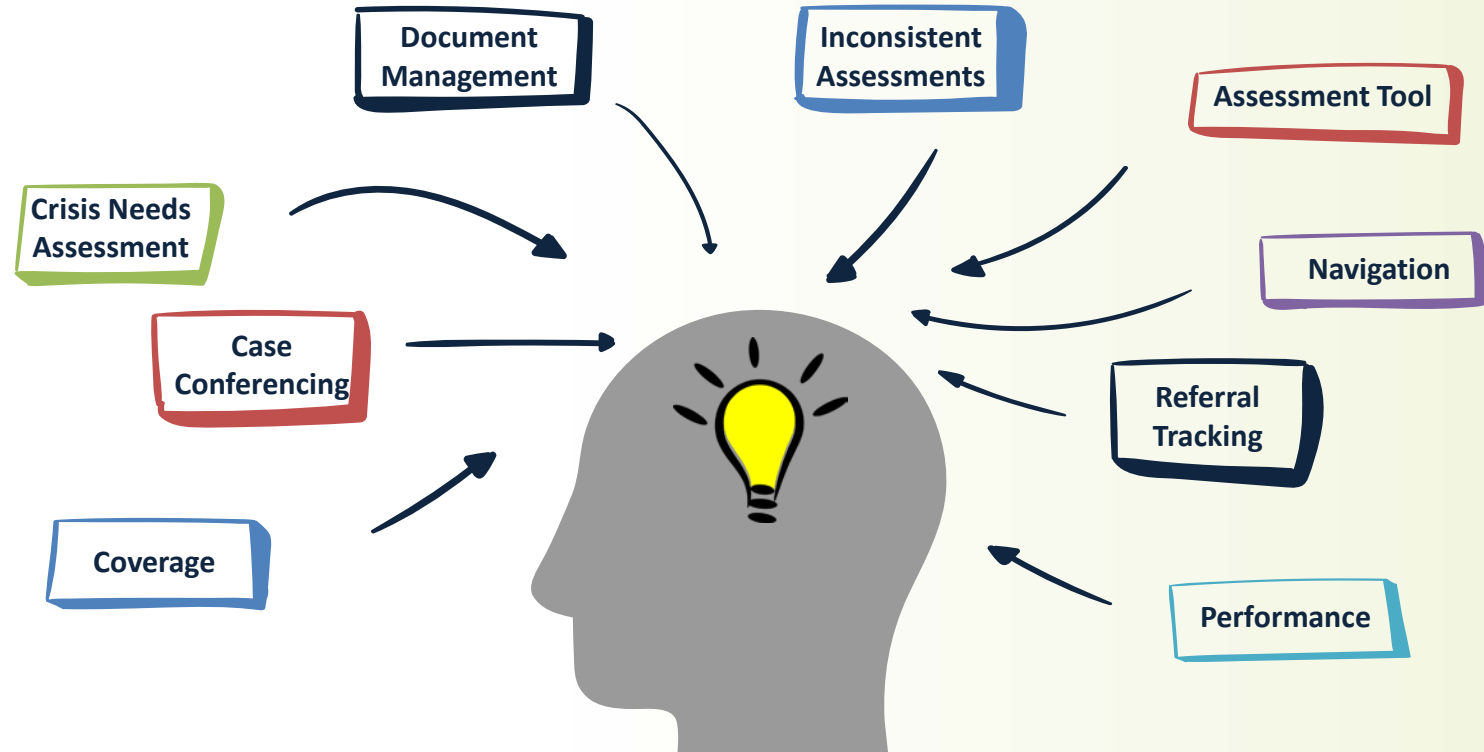**Keep the Vision Clear and the Work On Track**

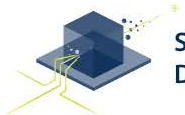**Mediate conflicts**

Coordinate Activities

Make sure everyone on the team contributes and benefits

Make sure project goals are delivered on time and on budget

5

Indianapolis CES – 2019

Document Management

Inconsistent Assessments

Assessment Tool

Crisis Needs Assessment

Navigation

Case Conferencing

Referral Tracking

Coverage

Performance

6

National Human Services Data Consortium

NHSDC

Streamlining Data to Inform
Decision Making and Break Down Barriers

2020 Fall Conference

October 2020

CES Refinement Workshop Prep

Identify Needed Resources

Keep the Vision Clear and the Work On Track
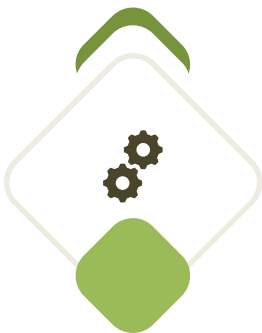
Recruit Effective Participants

Negotiate with Higher Authorities

7

National Human Services Data Consortium

Streamlining Data to Inform
Decision Making and Break Down Barriers
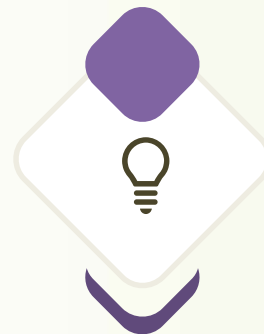
CES Refinement Workshop

**Keep the Vision Clear and
the Work On Track**

Mediate conflicts

**Provide a Framework for
the Project's Activities**

**Make sure everyone on
the team contributes and
benefits**

8

National Human Services Data Consortium
NHSDC

Streamlining Data to Inform
Decision Making and Break Down Barriers

2020 Fall Conference

October 2020
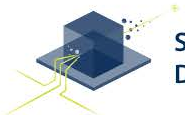
CES Refinement Workshop

Access

Less Access Points

Dedicated assessors

We need standardized scripts

Call in option

Assessment

Assessment tool isn't accurate

It takes too long

We need a Diversion Screening

Prioritization/Referral

Too hard to find clients

Who's supposed to collect documents?
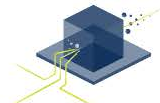
Automate the system

Transfers!

Accountability

Where do Veternans fit?

Who should be on the list?

How do we know we are doing well?

9

Refinement Strategies

cHIP COALITION FOR HOMELESSNESS INTERVENTION & PREVENTION

Access
1. **Refine and implement a full-time dedicated CES Assessor Team (in collaboration with Crisis/Outreach work group)**
2. Increase Assessor capacity through revised standardized training curriculum and scripts
3. **Develop and implement a CES Call in Center to improve efficiency and access**
4. **Right size Access Points in alignment with inflow data and dedicated assessor team**
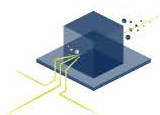
Assessment
5. Develop and integrate triage in HMIS including diversion and prevention screening
6. Refine the CES assessment for the purpose of streamlining and ease of administration
7. Develop a process to manage under-reporting in CES assessments to improve accuracy of vulnerability measures

Assignment/Referral
8. Automate the use of an electronic referral outcome in HMIS
9. Create a real-time inventory management in HMIS
10. Develop and implement strategies to make locating clients in the housing process more efficient and effective
11. **Define, implement and scale a dedicated system-wide Housing Navigation Team to quickly navigate households to available housing after assessment (in collaboration with Crisis/Outreach work group)**
12. Revise prioritization to address nuances in vulnerability
13. Build system pathways through CES to affordable housing and employment/self-resolution to end person's experience with homelessness (in collaboration with Income/Employment Work group once activated)
14. Refine the transfer process (intervention to intervention) including developing guidance on transfer process for providers and building capacity of service providers to minimize the need for transfers
15. Create a culture around the importance of collecting and uploading client documents system wide
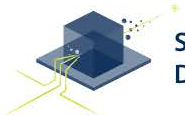16. Refine the case conferencing structure to increase accountability and support

Accountability/Pool Management
17. **Develop and implement a process for automating pool management, including refining veteran flow through the system (in collaboration with Veteran work group)**

10

National Human Services Data Consortium

Streamlining Data to Inform
Decision Making and Break Down Barriers

Work plan

Vertical	Identifier	Milestones & Major Tasks	Lead	Workgroup/Team Members	Other Vertical	Duration	Start
CES	1	⊞ Expand CES access to include the jail system					
CES	2	⊞ Build access to employment and income into CES					
CES	3	⊟ Refine the intersection between CES and DV to maximize access to housing resources for those experiencing DV					
CES	3A	⊞ Explore and implement refinements to all CES system components to incorporate access to resources for those that experience DV					
CES	4	⊞ Refine CES to Shelter system					
CES	5	⊞ Implement access refinements				205d	09/18/19
CES	7	⊟ Refine CES Assessment				107d	11/01/19
CES	7A	Build crisis needs assessment in HMIS			Veteran Vertical		
CES		⊟ Technical Set Up					
CES		Review Data Standards					
CES		Determine HMIS workflow for Triage					
CES		Determine or build out technical workaround for prioritization list					
CES	7A1	⊟ Develop and implement crisis needs assessment tool			Veteran Vertical		
CES		Identify stakeholders for workgroup		youth, veteran, DV, H			
CES	7A2	Refine prevention screening					
CES	7B	⊟ Refine assessment to streamline administration of the assessment				86d	11/01/19

11

2020 Fall Conference

October 2020

National Human Services Data Consortium
NHSDC

Streamlining Data to Inform
Decision Making and Break Down Barriers

CES Refinement Workgroup Example

- Referral Outcomes Tracking
    - Process was clunky and time consuming
    - Too complicated
    - People didn't follow process
    - Wasn't clear what happened once people were referred to housing
    - Difficult to pull reports and measure success

12
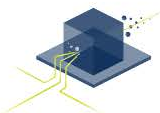
CES Refinement Workgroup Example

PREP

Meeting 1
- Current Process
- Limitations
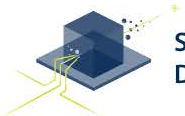- Consensus on refinement strategy

DRAFT

Meeting 2
- Presented draft of refined tool/process
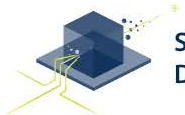- Made final adjustments

VENDOR

Meeting 3
- Demoed tool
- Created reporting and accountability process
- Determined training and implementation schedule

IMPLEMENTATION AND FOLLOW UP

13

Lessons Learned

- Prep is key!
- Bias towards action
- Be ok without perfection – good enough for now
- Come with "half-baked" work plan
- Be intentional with time
- Keep the vision clear and the work on track
- Right people at the table can make all of the difference

14

Questions?

Danielle Bagg Wireman

Danielle@chipindy.org

Matt Holland

mholland@chipindy.org