



CES REFINEMENT PROGRESS REPORT

FROM 2019 CES REFINEMENT WORKSHOP STRATEGY MEMO JULY 2022

In August 2019, thirty-two participants from 17 homeless service agencies in Indianapolis attended a full-day workshop facilitated by Clutch Consulting to discuss refinements needed to make the Indianapolis Coordinated Entry System (CES) more efficient and effective. The suggested strategies were shared in the CES Refinement Workshop Strategy Memo¹ and focused on four components of CES: access, assessment, assignment, and accountability, and were identified as first or second priority.

Since then, the Indianapolis CoC focused project management capacity on the 17 identified strategies. It is important to note that the original memo was released only six months prior to initial COVID-19 shutdowns in March 2020 and that capacity of the Indianapolis CoC shifted to crisis response instead of system refinement for much of 2020 and 2021. During April and May 2022, the CES Leadership Workgroup reviewed the 17 strategies to identify their status (complete, in progress, on hold, or not started), and current priority level (first or second) to reflect the changing needs and priorities of CES. This updated document will be used to help define additional CES refinement projects for 2023.

The status of the 17 strategies to date are:

- 5 have been completed
- 10 are in progress, with plans to be completed in 2022
- 1 is on hold due to no longer being a system priority
- 1 has not been started due to lack of clarity around ownership, the role of CES, and next steps

REFINEMENT TASK	PRIORITY	LEAD(S)	NOTES
COMPLETE			
Develop and implement a CES Call in Center to improve efficiency and access (Access)	First	CES (CHIP, CES Leadership Group, Workgroup)	In response to COVID-19, several CES Access Points began offering call-in options in March 2020, and several will continue to do so. A singular call-in center is no longer a prioritized strategy
Automate the use of an electronic referral outcome	Second	CES (CHIP), HMIS (CHIP)	HMIS built out in January 2020 in to include referral outcomes (received, attained/not attained,

¹ *CES Refinement Workshop Strategy Memo*. Coalition for Homelessness Intervention and Prevention (2019, September). Retrieved June 28, 2022 from <https://www.indycoc.org/ces-documents.html>



in HMIS (Assignment/Referral)			reason why not attained) and relevant HMIS users are trained on standards for updating referral outcomes
Increase Assessor capacity through revised standardized training curriculum and scripts (Access)	Second	CES (CHIP, Workgroup)	A workgroup met from March – May 2020 to define standardized scripts for CES Skilled Assessors In November 2020, standardized CES Skilled Assessor Training curriculums were created on TalentLMS, an online learning platform that allows for self-paced training that is consistent for all CES Skilled Assessors. The curriculum will continue to be developed as new training needs are identified.
Refine the case conferencing structure to increase accountability and support (Assignment/Referral)	Second	CES (CHIP, Workgroup, Case Conferencing)	In February 2021, workgroup defined the goals, agenda, and attendee expectations for Case Conferencing. We began using AirTable so that attendees could create and view the agenda and referral requests prior to the meeting, notes after the meeting, and tasks could be easily followed up on to increase accountability. CES Policies and Procedures were updated to reflect this.
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 (Assignment/Referral)	Second	CES (CHIP, Workgroup, City of Indianapolis, Case Conferencing)	In June 2021, workgroup defined a more transparent process to create and maintain the Transfer List, using AirTable to help prioritize the most urgent transfer needs. The City also advised when HUD does/doesn't allow transfers between projects. CES Policies and Procedures were updated to reflect this.
IN PROGRESS			
Right size Access Points in alignment with inflow data and dedicated assessor team (Access)	First	CES (CHIP, CES Leadership Group, Workgroup)	Phase 5 of CES Assessment and Prioritization Refinement in Q3 2022 will focus on clarifying goals and strategies regarding access point refinement, likely focusing



			on Assessor data quality and completeness benchmarks instead of number of referrals completed.
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; Assignment/Referral)	First	HomeNow, HIP, CHIP	<p>A Housing Acquisition Team was launched in 2021 to bring more units into the system. This team uses Padmission to track available units and make them accessible to housing service providers.</p> <p>As of June 2022, HIP is contracted to centralize system housing navigation. In collaboration with HomeNow and CHIP, HIP is creating a program model, process and workflow documents for System Navigators.</p>
Develop and integrate triage in HMIS including diversion and prevention screening (Assessment)	Second	HMIS, UWCI, YouthLink Diversion	<p>YouthLink Diversion funding started in October 2020. Since April 2021, this program has been fully integrated with HMIS and CES to divert youth and young adults from homelessness.</p> <p>United Way of Central Indiana (UWCI) developed a housing problem solving strategy, which was approved by the Blueprint Council in February 2021. The pilot began with 6 organizations and now has 10 as of June 2022. While some organizations are already using HMIS, UWCI continues to explore ways to get all integrated in HMIS.</p>
Refine the CES assessment for the purpose of streamlining and ease of administration (Assessment)	Second	CES, HMIS (CHIP)	Minor improvements to CES program workflow have occurred between January 2021-April 2022. Phase 4 of CES Assessment and Prioritization Refinement (Operationalization Phase) in Q3 2022 will focus on streamlining CES enrollment administration.



Develop a process to manage under-reporting in CES assessments to improve accuracy of vulnerability measures (Assessment)	Second	CES (CHIP)	Phase 3 of CES Assessment and Prioritization Refinement (Measuring Service Needs Phase) in Q3 2022 will focus on an improved measure of vulnerability.
Create a real-time inventory management in HMIS (Assignment/Referral)	Second	CES, HMIS (CHIP)	In Q2-Q3 2022, CES Assessment and Prioritization Refinement (Program Matching Phase) will develop a solution to track when programs expect to take new referrals, considering budget and staff capacity.
Develop and implement strategies to make locating clients in the housing process more efficient and effective (Assignment/Referral)	Second	HomeNow System Navigation, HIP, CES (CHIP), HMIS (CHIP)	System Navigation centralized at HIP under HomeNow seeks to reduce the length of time from referral to housing by providing housing navigation services to those referred to housing through CES. System navigators will also proactively attempt to locate clients high on the CES prioritization list. HMIS and CES trainings should convey importance of adding client contact information to HMIS.
Revise prioritization to address nuances in vulnerability (Assignment/Referral)	Second	CES (CHIP)	This will be completed in Phases 3 and 4 of CES Assessment and Prioritization Refinement (Measuring Service Needs, Operationalization) in Q3
Create a culture around the importance of collecting and uploading client documents system wide (Assignment/Referral)	Second	HomeNow System Navigators, CES (CHIP), HMIS (CHIP)	System Navigation centralized with HIP will proactively attempt to locate clients high on the CES prioritization list and collaborate with service providers and CES assessors to gather or request documents HMIS and CES trainings should convey importance of uploading client documents to HMIS.
Develop and implement a process for automating pool	Second	CES (CHIP), HMIS (CHIP)	In 2020, CES developed process for both automated (ex. auto-



management, including refining veteran flow through the system (in collaboration with Veteran work group; Accountability/Pool Management)		VA Technical Assistance	exits) and manual (ex. document verification) pool management. 2022 VA TA may address veteran flow through the system.
ON HOLD			
Refine and implement a full-time dedicated CES Assessor Team (in collaboration with Crisis/Outreach workgroup; Access)	Was first, now second	CES (CHIP, CES Leadership Group, Workgroups)	New dedicated CES Skilled Assessor positions (ex. coordinated outreach) have been created in 2020-2021. CES Leadership Group suggests that there may be alternative and more valuable ways to improve CES data completeness and quality rather than full-time, dedicated assessors.
NOT STARTED			
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; Assignment/Referral)	Second	Unclear	CES Leadership Group believes that other CoC stakeholders are required to lead this work, but ownership and next steps are unclear.

With questions or for more information about CES Refinement work, please contact Lisa Huffman, Project Manager at CHIP (lhuffman@chipindy.org).