

# Coordinated Entry System Process Mapping Facilitation Instructions

## GOALS OF CES PROCESS MAPPING:

- 1) To obtain a qualitative and quantitative understanding of how your system works, told both by data and the people who have the most expertise of your system and are closest to the problems.
- 2) The goal of this process map is to get a snapshot of how your system currently works. We have to understand where we are in order to begin planning where we are going. This exercise helps you have a full comprehensive view into your system as it currently operates so that you can later design improvements for how you want it to perform later.
- 3) Your goal of this activity is to get as much detail on this process as possible from as many people.
- 4) [Slides introducing process mapping](#)

## IN ADVANCE OF FACILITATION

- 1) **Based on the complexity of your system, choose which population you will be mapping the process for. Examples:**
  - a) Veteran
  - b) Youth
  - c) Family
  - d) Chronic
- 2) **At least one month prior, send invitations to attendees. You need to gather:**
  - a) People closest to the outreach and housing processes across all areas of your system. This will include:
    - i) Coordinated Entry Specialists
    - ii) Housing Navigators
    - iii) Outreach Workers
    - iv) Shelter Providers
    - v) Housing Providers
    - vi) Anyone who fills out vulnerability assessments
    - vii) Anyone who does referrals or who receives referrals.
  - b) System Leadership and funders
    - i) Invite leaders or funders as listeners and watchers of the facilitation. They may not participate in building the process, but can be helpful observers.
  - c) Ensure that your invite list includes people with lived experience of navigating your system.
  - d) Here's a [sample email](#) to send to invitees.

**3) Assign Roles for planning & day-of logistics:**

- a) Based on the size of your invite list, you need to assign different roles.
  - i) If you are in a mid-sized or large community and have invited more than 10 people to your event, you will need to assign one lead facilitator and four additional facilitators.
  - ii) Assign a facilitator who is NOT a core CES member. The facilitator ideally does not participate in the exercise, but watches, observes, and facilitates the conversation.
  - iii) If you have invited around 10 people or less, assign one facilitator.

**4) Prepare your data lead and ask them to pull any relevant reports for the group to consider alongside the exercise. For example,**

- a) We have 500 self-identified Veterans in HMIS, but only 100 in CES, which is our By-Name List.
- b) We don't know how many of the self-identified veterans are actually "qualified" veterans
- c) We are able to see housing placements from SSVF but not HUD-VASH in our CES
- d) We have access to the PHA's internal database on their timelines and the VA's HOMES report that they send to VA HPO monthly on lengths of time between buckets.

**5) Other general things to consider:**

- a) [Consider reviewing this checklist](#) to consider other good rules of thumb while planning an in-person meeting.

# CES Process Mapping Setup Guide

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## **Materials:**

- Six sheets of flipchart paper
- Multiple large sharpies
- Different colored post-it notes (lots of them)
  - One color: Your "process step"
  - Second color: "detail step" will be in another color
  - Third color: Areas for improvement /feedback/reflection
- Pens

## **Setup Time:**

- 15 minutes to build flip charts
- 30 minutes to review + prep for facilitation

## **Build Flipcharts**

- At the top of each flipchart, write the title of one of the CES buckets and an extra flipchart for later facilitation:
  - Access
  - Assess
  - Match/Referral
  - Housing Navigation
  - Stabilize
  - Improvements

# Coordinated Entry System Process Mapping: Facilitation Guide

Time	Activity	Materials
10 minutes	<b>Introductions and Framing</b> <ul style="list-style-type: none"> <li>Remind folks why you are gathered and the goals of the day.</li> <li>Make sure every person gets to introduce themselves and their role in the system! We want to ensure that you are able to break down silos and forge new connections that may result in greater coordination and alignment across your system.</li> </ul>	Sample email to frame
60-90 minutes	<b>Complete Reflection Prompting</b> <p>If you have fewer than 10 participants:</p> <ul style="list-style-type: none"> <li>Start at the Access Flip chart and begin a conversation. The facilitator begins by asking the group: <ul style="list-style-type: none"> <li>What is the first step to people accessing your system? <ul style="list-style-type: none"> <li>For EACH step, the facilitator should ask: <ul style="list-style-type: none"> <li>WHO is doing that?</li> <li>HOW is it getting tracked?</li> <li>HOW OFTEN is this being done?</li> <li>Facilitator, keep being curious! Continue asking probing questions until you have a complete enough picture that an outsider might understand your system's process.</li> </ul> </li> </ul> </li> <li>What is the second step?</li> </ul> </li> <li>One note taker is writing the group's consensus on the FIRST color of sticky notes.</li> <li>Continue this facilitation process with each of the CES buckets.</li> </ul> <p>If you have more than 10:</p> <ul style="list-style-type: none"> <li>Break the group up into five groups (one group for each flip chart).</li> <li>Start each group in a different bucket. The group will spend the majority of the time on their assigned bucket, and then will spend additional time "gallery walking" the other steps to provide any additional detail that other groups may have overlooked in the second color of sticky note.</li> </ul>	<p>Flip charts.</p> <p>Use the first color of sticky note to write out the STEP. Use the second color of sticky note to write out answers to the facilitator's questions.</p>

<p><b>10 minutes</b></p>	<p><b>Take a Step Back</b>  <i>When each of the flip\chart prompts has been completed, full team reflects on the exercise by answering the following questions:</i></p> <ol style="list-style-type: none"> <li>1) What stands out to us?</li> <li>2) What feels surprising?</li> <li>3) What is our system particularly good at?</li> <li>4) Where is room for improvement/clear pain points?</li> <li>5) What is new knowledge that you didn't have before or a realization about your system?</li> </ol> <p>Note: this step should be the first time you are moving from "current state" to ideating about future changes/ improvements. Until this point, you should solely be focused on "How does our current system work, RIGHT NOW?"</p>	<p>Note-taking in third post-it color</p>
<p><b>10 minutes</b></p>	<p><b>Next Steps</b>  <i>Team makes decision(s) about what to do with what they have discovered or learned and makes a plan for which areas to make improvements first.</i></p> <p>From the bucket flipcharts and conversation, pull out any change ideas or ideas of improvements or changes that group members want to test.</p> <ul style="list-style-type: none"> <li>● List them all out on the sixth flipchart and have individuals vote with sticky notes on where they want to start.             <ul style="list-style-type: none"> <li>○ You vote in a few ways:                 <ul style="list-style-type: none"> <li>■ Vote on overall top three changes you believe will make the biggest improvement in your system.</li> <li>■ Everyone vote for 2 "easy, immediate wins," and vote for two "long-term, hard-won solutions we need to begin working on"</li> </ul> </li> </ul> </li> </ul> <p>This is also a step you can do asynchronously if you are out of time! ***</p>	<p>Use the sixth flipchart.</p>
<p><b>10 minutes</b></p>	<p><b>Close</b></p> <p>Consider closing with a reflection from a senior leader, or offering time for folks to appreciate one another, or reflecting on one new person or thing they learned about their system today.</p>	

## Example Process Maps

These are examples of real process maps that communities built while using this exercise. You'll notice some slight variability in the way each one was designed, but overall they demonstrate how communities have used this guidance to examine their system and identify areas for improvements.

1. [VA / GPD Process Map](#)
2. [CES Process Map](#)
3. [SSVF Process Map](#)