



Wellbriety Program's Referrals Strengthening Project

Since time immemorial, the Schitsu'umsh, or the Discovered People, known today as the Coeur d'Alene Tribe, have lived within an abundance of beauty and resources. As with many Native American tribes, the Schitsu'umsh have also grown, overcome, and adapted as a community to an ever-changing environment of hardships, successes, and life. Today the Coeur d'Alene Tribe, located in north Idaho, consists of over 2,600 members and is the second largest employer in the region, overseeing enterprises such as the Coeur d'Alene Casino and Resort, Marimn Health, and the Tribe's Government Services Division.

Marimn Health is located on the Coeur d'Alene Reservation and provides quality health and wellness care to Coeur d'Alene Tribal Members and community members in Plummer, Worley, and DeSmet/Tensed, as well as to residents from surrounding counties and states. Marimn offers medical, dental, behavioral, and community health services. In 2018, the Tribe partnered with the US Department of Justice's Bureau of Justice Assistance with a grant to establish the Re-entry Program (since changed to the Wellbriety Program) for community members returning from corrections or treatment facilities. The Wellbriety Program removes barriers while advocating for and assisting community members when they return home. Assistance and peer mentoring is offered to help navigate the resources, programs, and opportunities available on their journey in sobriety. The Wellbriety Program has made healthy living the top priority for clients, focusing on main components health, personal needs, self-respect, and reintegration.

The Coeur d'Alene Tribe and Marimn Health have partnered with the University of Washington's Seven Directions Program, to develop the **Wellbriety Program's Referrals Strengthening Project** with the goal to improve the alignment of services for Wellbriety clients. The program focuses on *improving and tracking referrals for clients in order to improve the assistance and care they receive from a multitude of health and tribal departments/programs.*



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THE SITUATION

In 2015, the Coeur d'Alene Tribe conducted a community justice assessment. The assessment showed that local service providers in health, law enforcement, and human services were often working independently in silos, while not collecting, sharing, or reporting important data with one another, despite shared clientele. The Tribe developed a Comprehensive Tribal Justice Strategic Plan for 2016-2022 with the overarching goal of improving public health and safety on the reservation by reducing substance abuse and crime. This collaborative strategic planning involved the Tribe's elected leaders, Law & Order Departments, Marimn Health, Department of Education, and Social Services Department. Several action items in the Plan focus on establishing a Tribal Justice Systems Database that includes a formal referral tracking system to improve the accountability of services to clients.

The Assessment found that once released from facilities, individuals accessed services from important and critical justice system service providers – Housing, Social Services, Tribal Court, Marimn Health, and Education. However, many were ultimately unsuccessful in maintaining sobriety within the first few weeks and months. This created a cycle of hardship for individuals struggling with sobriety and stability, as well as for their families and the community at large.

The Wellbriety Program offers peer support services to clients by building relationship with them before they exit corrections or treatment facilities. However, program staff *were hindered by the lack of a formal referral system for helping clients engage with these services*. Referrals were often lost, not followed up on, or simply not adequate to truly help clients. These programs have software and database systems that do not easily integrate to share important information and referrals for services. Thus, the creation and implementation of the **Wellbriety Program's Referrals Strengthening Project** began.





IMPLEMENTATION HIGHLIGHT

The Tribe implemented four important project strategies/activities in the **Wellbriety Program's Referrals Strengthening Project**.

1. Identify and map key partners and stakeholders

Marimn Health, the Tribe's Strategic Initiatives Office and IT departments, and database consultants worked collaboratively to map critical services, such as shelter, transportation, food and clothing, health, and employment partners.

"Prior to this process, we assumed that referrals could be done simply via phone or email. We quickly realized there are many partners involved for the services our clients need to assist them in their journey to healthy living."

- Ryan Ortivez, Wellbriety Program Peer Coach, Marimn Health

2. Map Wellbriety Program processes for various types of referrals

The team created a flowchart to map the referral process (including formal and informal processes) and identified key handoff points where an activity, responsibility, or information was transferred from one person or program to another. Once the current process was mapped out, the team identified redundancies, loopholes, and opportunities to improve and streamline the process. The result was a recommended process map from start to finish.

"The journey toward establishing a formal referrals process was daunting, especially after we realized there were different types of referrals. But once we identified what they were, we knew which needed to be prioritized and then we were able to map out what the referrals process should look like and how it could be simplified."

- Marquette Hendrickx, Marimn Health Operations Director, Coeur d'Alene Tribe

3. Hire key staff

Identifying or developing the right database to track referrals was a challenge given the size of the Tribe. We needed to build our internal capacity to achieve our objectives. The Strategic Initiatives Office hired two data analysts to manage the project, and two consultants were contracted to assist with mapping and database systems development.

"It can be difficult for a rural tribe to connect with the right partners for software and database development. The vast number of them do not have experience with tribes or understanding of data sovereignty. Furthermore, some are unwilling to work with tribes such as ours because we are small, remote, and have unique systems and partnerships."

- Elva (Cookie) Allan, Strategic Initiatives & Development Director, Coeur d'Alene Tribe

4. Centralize the intake and referrals processes for justice systems partners

The team realized that a universal intake form would be key to streamlining data collected and shared among partners. A universal intake form lays the foundation for a centralized referrals process for justice systems programs, and if successfully implemented, can be used across all service providers of the Tribe. The team selected two software programs: Airtable and airSlate, because they could successfully send simulated referrals from Wellbriety to the Career Renewal Program at Social Services.

"Our long-term goal is to take this pilot project and expand it across the Tribe, to develop it and make it scalable so that there can be improved service delivery within, as well as outside of the justice system."

- Corey Smith, IT Specialist, Coeur d'Alene Tribe

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SUCCESSES

Partnerships and communication were strengthened by programs involved in the **Wellbriety Program's Referrals Strengthening Project**. Consistent and intensive dialogue took place with each partner and stakeholder in order to research and map the types of referrals and the processes needed to create a streamlined and efficient referrals system.

"There shouldn't be excuses for not sharing data within our Tribal programs and organizations. We must prioritize privacy and confidentiality through strengthening permissions and data sharing agreements, but we ultimately must find a way to integrate and share data because that's how we get the full picture. These are our family members and loved ones that we are trying to help."

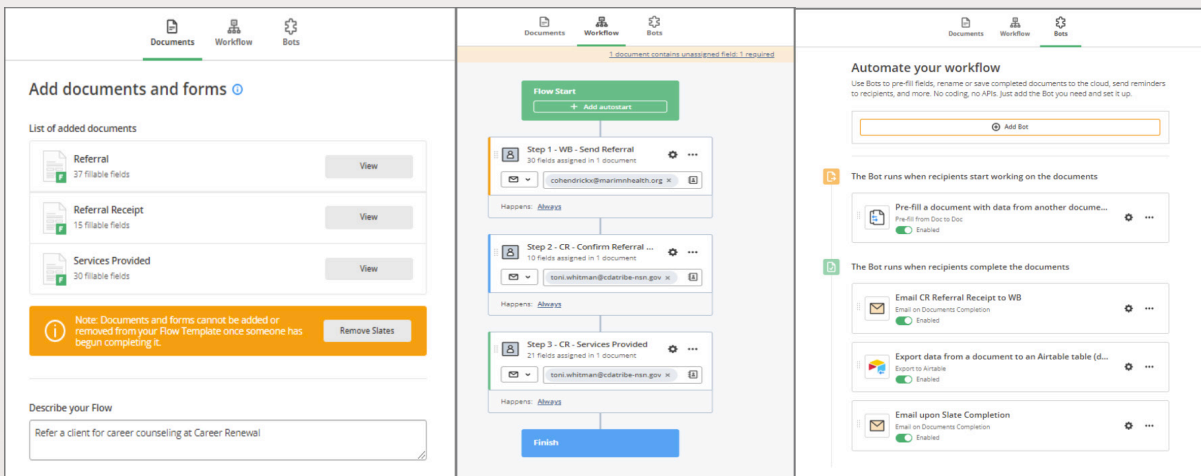
- Chief J. Allan, Chairman

Mapping the referral types and different partners offered an important and unifying visual for staff to make sense of what was needed and which areas to prioritize.

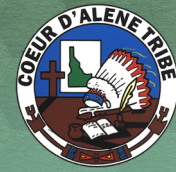
"The mapping visual offered a road-map for the Tribe to pursue the development of a referrals system and to sell the idea to other stakeholders and Tribal leaders."

- Robert Matt, Administrative Director, Coeur d'Alene Tribe

Airtable and airSlate were used successfully to send simulated referrals from the Wellbriety Program to the Career Renewal Program at Social Services.



Lastly, this project attributed to professional growth and development among the staff involved. Extensive training in database development and data integration took place, including training in Tableau, airSlate, Airtable, coding and program writing, and understanding other systems such as NexGen, Full Court, and Microsoft Access/Excel.



LESSONS LEARNED

Key lessons were learned along the way for the **Wellbriety Program's Referrals Strengthening Project** included accepting and understanding that:

- 1) Creating a customized and hybrid system can work.
- 2) Key stakeholders need to be on the same page for cross-sector alignment to happen.
- 3) A shared vision and training are needed in a collaborative training process.
- 4) Coaching and accountability by outside partners has been beneficial.

The COVID-19 pandemic presented a major barrier to completing the **Wellbriety Program's Referrals Strengthening Project**. Lockdowns and social distancing made it difficult for us to meet, slowing communication and project management. Marimn Health staff needed to prioritize mediation and containment of the virus in the community.

Additionally, it was difficult finding consultants willing to work with a rural Tribe to develop a customized system. Many consultants have limited to no experience working with Tribes or a sovereign entity and struggle to understand the dynamics, challenges, and opportunities.

Another obstacle we encountered was whether existing commercial software systems and businesses would respect and uphold tribal data sovereignty. In our case, tribal data sovereignty is data that is stored on premises and is housed, operated, and maintained by the Tribe and its employees. Many existing software systems like airSlate and Airtable are web-based, meaning the data is not stored on a server that is onsite at the Tribe's IT department. Instead, data is housed on servers offsite or "in the cloud." Tribes need reassurance that the data will be secure and protected, and that it belongs to the Tribe.

A final barrier was the understanding and training needed by the Tribe's staff on software options and development needs. It was challenging for the Tribe's IT department, other organizations, and departments like Marimn Health, the Wellbriety Program, and Strategic Initiatives to learn customizable software and database tools to create an intake and referrals system that met the needs of the Wellbriety Program and their partners.





KEY RESOURCES USED

Documents & Processes:

- Release of Information (ROI) Forms
- Example of all partner Intake and Assessment Forms
- Mapping of types of referrals and prospective referrals processes
- Wellbriety Intake Forms
- Wellbriety Individual Service Plan Form

Technology:

- airSlate
- Airtable
- Google Data Studio

Tribal Partners:

- Tribal Council
- Marimn Health Board
- Tribal Career Renewal Program - Social Services
- Wellbriety Program – Marimn Health

Other Significant Partners:

- Red Star International
- Seven Directions – University of Washington
- Independent Consultants – Technology, Software Integration and Primary Data Collection

NEXT STEPS

The next steps of the **Wellbriety Program Referrals Strengthening Project** will be to finalize the universal intake and referrals process system utilizing airSlate and Airtable and bring it online where it is actively used for referrals. We also will be working with airSlate and Airtable software representatives to ensure data privacy is protected and respected and upholds our Tribal Data Sovereignty goals.

Further customizing automated messaging, notification, and tracking of individual referrals will be completed with airSlate, while Airtable will help create a database for the tracking and progress of multiple types of referrals for each client. Once these steps are completed, the piloting of the referrals system will be expanded to other departments and programs within Marimn Health and the Tribal government division.

Once the referral system expands, the establishment of data sharing agreements will also be developed to assist with the expansion as it will allow relevant data to be shared between different departments and programs to achieve better services and care for referral clients.

To monitor and evaluate the effectiveness of the extensive referrals process system, we will use Qualtrics and airSlate. They will collect feedback on how departments and programs are experiencing the referrals process by analyzing such experiential (qualitative) data. Additionally, after more operational data is collected from the referrals process system, we will utilize Tableau, PowerBI, and Google Data Studio to complete more in-depth analysis of such operational (quantitative) data.



CONCLUSION

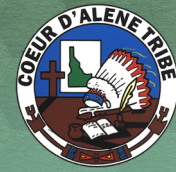
A referrals system that functions with automated workflows, along with data collection and analyses, will assist with the tracking and progress of referrals, along with generating of automated notifications about the status of referrals between varied departments/programs and clients. A comprehensive referrals system will help prevent clients from falling through the cracks and becoming another statistic of recidivism or social-economic hardship. This will ultimately help the tribe by helping its individual members reconnect to their families and community in a healthy way, ensuring an abundance of beauty and resources for many generations to come.

"I can see this type of referral system being needed and replicated for use by other tribal entities and tribal governments who may be in dire need of helping their citizens reintegrate and connect healthfully back into their communities. This referral system helps strengthen data collection, data sovereignty, and data analysis. Looking at the data and the story it tells can help tribes focus on the needs of their citizens and make improvements to how they operate and serve their people."

- Chris Meyer, Director of Education for the Coeur d'Alene Tribe.



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FOR MORE INFORMATION

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Led by Seven Directions, A Center for Indigenous Public Health at the University of Washington, ***Indigenous Systems: Revitalizing Inherent Alignment*** is a practice-based research study of how health care delivery, public health, and social services sectors work together to achieve shared goals.

Red Star International, Inc. collaborated with the Coeur d'Alene Tribe by administering a small grant and providing support to work across sectors to strengthen communication, collaboration, and service coordination for its communities.



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