CASE CONFERENCING ACTION PACK

Change ideas and practical advice to make your case conferencing action-oriented

Developed with Built for Zero communities

HOW TO USE THE ACTION PACK

- Inside is a collection of methods pulled from Built for Zero Collaborative communities that will help you run an action-oriented case conferencing meeting—one that moves your team from thinking in terms of "my client" to "our clients." Wherever you're starting from, you'll find an idea to improve your effort.

- Flip through it and pick ideas that are relevant to your team. *Consider it an idea buffet*—take what you want, and leave the rest behind! Don't worry about reading it sequentially.

- We're using "case conferencing" as an umbrella term for multi-agency coordination meetings that focus on housing clients. You may call that meeting by another name, and you may have multiple meetings that apply. Adapt the language in this guide to your local context where needed.

- We're calling it an "action pack" because we want to take action ASAP, as in next week. Start marking up the ideas that your team can put into practice.

This print version is a partial selection of our change ideas; find the full resource online at bfzchangepackage.org

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▸▸ *denotes a good starting place*

1. Align participants in a shared purpose of case conferencing

- **Get clear on the meeting's objectives**
  - ▸▸ Crowdsource objectives: Start one meeting by facilitating a 10-minute conversation about your case conferencing practice's goals and objectives. Ask each participant to share one value they receive (or would like to receive) from case conferencing. What results do they want to see? Synthesize answers, including yours, into a handful of objectives that can be written, shared, and committed to. Consider adding the new objectives to the recurring calendar invitation or placing them on the agenda to remind the team of your shared purpose.
    - If you run multiple case conferencing-style meetings, define a set of objectives for each one.
  - Define un-success: Ask the room to describe a bad meeting, and record their responses on a white board or flipchart. Now ask what actions you can take as a group to avoid each outcome. Agree as a team to take these actions. As a team, periodically review the commitments to monitor your progress in making it a useful, engaging meeting.

- **Develop a problem-solving, client-centered culture**
  - ▸▸ Make facilitation client-centered: Ask questions that invite team members to speak specifically about the client, quote the client, or adopt the client's point of view. Ask follow-up questions that cause the room to calculate the impact of a decision on the client; it is always the right time to ask, *How will this affect the client?* When you notice that conversation is dwelling on staff experience or an agency's rules, pivot back to a client-centered question!
  - Frame for collaboration: At the beginning of meetings, talk about the meeting as a place where participants can share the responsibility of housing clients and use the team's collective brain power to house clients faster. When given an update about a client that is brief or protective such as "We're working with them," ask gentle questions to elicit more details and invite others into the discussion. Smash through agencies' isolation and take steps to act as one team.

- **Connect systemwide goals to case conferencing**
  - ▸▸ Set a small goal and quickly meet it: Set a concrete, near-term goal, such as "6 housing placements this month." Toward the end of the meeting, check together if you are on track to meet the goal. Did you identify 6 clients with target move-in dates set for this month? If no, look back through the by-name list together. Press the team to find and record new commitments that will reach the goal—or identify what about your system (not your clients!) can change in order to help you reach the goal.
  - ▸▸ Celebrate progress: Whenever you see the team's work paying off, let them know! Never assume that everyone already noticed. Did your number of housing placements increase since the last meeting, or did you reach a milestone number on your by-name list? Celebrate it! Get granular: Did someone house a particularly long stayer, or together did you figure out housing plans for 75% of people on the chronic list? Spot the improvement and call it out!

2. Setup your by-name list for case conferencing

- **Create fields to capture learning and commitments**

    - ▸▸ This Week's Obstacle: Record the obstacle that is making it difficult for the client to move toward housing. *Remember that the obstacle is within your system, not within the client!* The obstacle may change from week to week. Clarifying the obstacle will help your team come up with creative solutions, and recording it will reduce the need for repetitive updates at the next meeting.

    - ▸▸ Next Step, By When: Conclude the discussion of each client by recording a commitment—a next step and a date by which it will be completed. At the next meeting, ask if the next step happened as expected. If yes, what comes next? If no, what unexpected thing happened, and what can the team learn from it? Now set a new next step!

    - Target Move-In Date: See *Facilitate the meeting for action: Set target move-in dates.*

- **Include information that creates clarity and urgency**

    - ▸▸ Length of time on by-name list: You may call it something different, but make sure the total wait time is clear.

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3. **Facilitate the meeting for action**

- **Set target move-in dates 🔥 GAME CHANGER**
  Target move-in dates take your case conferencing practice from coordination to system improvement

  - ▸▸ Ask for a target move-in date: For each client you discuss, ask the case manager for a date by which they expect to see move-in. Add a field on your by-name list or case conferencing notes to record the date. This small question sets you up for accelerated action and system learning. More than any single change, adding this practice makes a huge difference in turning your case conferencing meeting into a housing accelerator.

    - When a client moves in by the target date, congratulate the case manager—and ask what we can learn from this successful process.
    - Invite providers to indicate early on when a client is not 'on track' for their target move-in date. Engage the group to problem solve in order to meet that goal
    - Make it an occasion for learning when a client does **not** move in by the target date. Ask the case manager follow-up questions: What went differently than they expected, what can we as a team learn from it, what can we try differently now, what's new target move-in date makes sense, and how can we all support them in housing the client?

  - Change to "Target Milestone Date" if helpful: For clients who may be multiple months away from housing, instead adopt a "target milestone date." You might consider "target match date" or any process step that makes sense in your context. This move is useful if your discussion is limited to an earlier part of the housing process.

  - Start a learning loop: Once you begin setting target move-in dates, observe results. Are certain processes or obstacles consistently delaying target dates? Are capacity issues freezing up some case managers? Scope an improvement project to change the recurring issues that arise. If team members predict move-in dates that are drastically different from the eventual result, or if your target dates are set excessively far in the future, then these are signals leading you to new improvement work.

  - Forecast progress to goals: Sort your list by target move-in dates to forecast if you are on track to meet housing placement goals. If you planned to house eight clients in February but count only six target move-in dates, then discuss it with your team and look for new changes to try.

- **Ask questions that provoke action and problem solving**
  - ▸▸ Try a basic facilitation flow:
    - 1. State the client's name and the previous "next step"
    - 2. Ask what action has been taken to house the client since then
    - 3. Define the largest obstacle the client is facing this week
    - 4. Record a new next step to move them closer to housing
    - 5. Record or edit the target move-in date
  - ▸▸ Start with the previous next steps: "At the last meeting you said that you would do _______ with this client. How did that go?"
    - If the next step happened, ask about the result and what the new next step should be. If applicable, call attention to any new learning that the team can be gleaned from what worked.
    - If the next step did not happen as planned, ask questions like "What happened instead?" or "What diverted it from going as planned?" Use it as an occasion to learn about your system and plan the next step.

- **Ask follow-up questions that move the conversation forward**
  - "What is your theory of what needs to happen, from A to Z, in order for this person to move into housing?"
  - "What obstacle in our system are they facing this week?"
  - "What is your next step in housing them?"
  - ▸▸ An essential question for long-stayers: "What is one thing we haven't tried yet that we can try this week?"
  - Engage resistant providers by asking for help with a specific action step: They may be hesitant to take part in larger initiatives but ready to collaborate if it means housing a client faster or easier.

- **Use notes to establish commitments and create accountability**
  - Ask someone who is *not* the facilitator to take notes.

- ▸▸ Ensure that each commitment or action step is recorded and shared. Include a date! Recording commitments is an essential step to building accountability.
- Record notes in purposefully created columns on the by-name list instead of a catch-all Notes area. (See *Optimize your by-name list for case conferencing: Create fields to capture learning and commitments.*)
- Pick up from where you left off: Use notes from the previous meeting to expedite conversations in today's meeting. Cut out repetition except where intentional.

- **Set the time and place responsively**
  - ▸▸ Meet more than once a month. Virtual meetings count! The reality is that teams that meet for case conferencing only once a month find it difficult to achieve breakthrough results.
  - Reduce the duration to keep meetings brief and focused. Case conferencing isn't your catch-all meeting to figure out every bit of coordination; it's a time to creatively move people through your housing system! Many teams schedule it for one hour. If it's 90 minutes or two hours, work to keep it action-oriented—and evaluate your practice carefully to make sure that long meeting is delivering results.
  - ▸▸ Balance duration and number of clients: Given your goals for case conferencing, consider what information or decisions need to be exchanged for each client, how long that will take, and how many clients you can productively discuss in a single meeting. Avoid covering too many clients in a single meeting, or you'll find yourself stuck in updates mode! If you have more clients than time allows, consider how to prioritize them in a way that helps you meet your team goals.

- **Sequence or divide your list**
  - ▸▸ Divide your meeting into two parts in order to drive focus: In part 1, discuss only clients who are already matched to a resource. Announce that the operative question is *How can we house this person faster?* In part 2, discuss only clients who are not yet matched to a resource. Shift the operative question to *What resources or strategy can we put together to help this person get housed?*
  - Create multiple meetings to address different parts of the housing process: One community holds a meeting to discuss clients who need outreach or resource matches, then the next week their meeting focuses only on clients who need housing navigation. Figure out which process steps you can isolate and structure your meeting around.

- Create multiple meetings to address different sub-regions: With a big list, try conferencing through smaller lists focused on smaller areas. Avoid duplicating clients across parallel meetings if you can.

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4. Measure the effectiveness of your case conferencing practice

- **Evaluate your practice—and your results**
    - ▸▸ Select a couple of key measures that will indicate if your meeting is accomplishing its purpose. Collect data and check it after every one or two meetings. *Your case conferencing meeting should produce a measurable impact.* Study the results and keep making changes until you fulfill your objectives!

- **Select measures related to system outcomes**
    - ▸▸ Moving clients through the process
        - How many clients on the list have a clear next step?
        - How many clients have a housing plan?
    - Target move-in dates (see *Facilitate the meeting for action: Set target move-in dates*)
        - How many move-in dates were set
        - Percentage of the list with a target move-in date within the next month
        - How many clients moved in by their target move-in date within the past month

- **Select measures related to meeting effectiveness**
    - ▸▸ How many “next steps” set or commitments were made today? If case conferencing does not produce action, then it may not deliver value for your community.

- What percentage of "next steps" from the last meeting were executed? Assign a person to count and report back. Tracking this number will tell you if your meeting is successfully sparking action or if it merely feels effective.

- Beware of using attendance as a measure! Radical dips to your attendance may signal an issue, but remember that you can have fantastic attendance for an ineffective meeting. And vice versa!

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5. Center case conferencing in your system for improvement and learning

- **Find your next improvement project**

  - Hunt for themes on the by-name list: Sort by "This Week's Obstacles" or your barrier field. What recurring themes do you see? When an obstacle is affecting multiple clients, you know it's time to scope an improvement project and make a change
.
    - **Example #1:** Imagine that you are case conferencing clients who are matched to a resource. You sort by the "This Week's Obstacles" field and find that eleven people have seen their applications rejected by landlords in the past month. Run some tests of change. If successful, you may see the number of affected clients drop from eleven to six. Ultimately your housing placements rate will rise as a result.

    - **Example #2:** If you sort by the "This Week's Obstacles" field and find that many of your clients cannot be located, consider scoping an improvement project related to outreach. You might check if your system is adding clients to the by-name list too quickly. Test your theory, quickly confirm or refute it, then move onto a solution that will help these clients.

    - **Example #3:** If you notice in case conferencing that many clients are waiting for a unit inspection, run an improvement project to reduce the inspection times. Get as specific about the problem as you can before you get creative with solutions.

- **Build will for improving system architecture**

  - If you are still developing a quality by-name list: Improve your case conferencing practice now, as it will help you house people faster even before you have quality data. Don't wait!

- Replace verbal updates with offline data collection: If updates are taking up a large portion of your meeting, then ask what info you could collect before the meeting. Test several approaches to data collection or meeting prep to find one that consistently works.

- ▸▸ Look for system tune-up opportunities: If the by-name list you're using in case conferencing frequently contains errors, outdated information, missing names, or names that should no longer be on the list, then troubleshoot the issue with your data team. Don't just "clean the list"; change the underlying issue that necessitated a clean-up!

- **Connect to your leadership team**

  - ▸▸ Designate a leadership team liaison: Invite a systems-level leader to regularly attend case conferencing meetings, understand system barriers and challenges, and take the understanding back to the leadership team for problem solving and path-clearing.

  - Generate a running report: Capture systems barriers and challenges and share it with the leadership team after each meeting. Use cloud-based software like Google Docs so both groups can provide real-time updates.

- **Develop leadership skills across your coalition**

  - Make it a training program: Consider how to setup your meeting so that experienced, successful case managers are modeling their behaviors, thought processes, and resource connections for newer case managers. Many agencies see high turnover, and this meeting can reinforce training for new hires.

  - Make it a leadership lab: Consider how key members of your team can use this meeting to build leadership skills. Action-oriented case conferencing requires creative problem solving skills, strategic thinking, systems thinking, project management, driving for results, group decision-making, conflict resolution, and improvement mindsets. How can you invite people into practicing or growing those competencies so that they are one day ready to lead a team?