

Built for Zero Learning Session

Denver, CO || October, 2019



Breakout:

Build Your Next Improvement Project in Case Conferencing

In this session, we will...

1. Talk about how you decide when and what to change
2. Check out change ideas from the Case Conferencing Action Pack
3. Practice using case conferencing to identify opportunities

How do you decide what to change?

List recent changes your team has made

- In 2 mins, list as many recent changes as you can think of
- Separate out external changes—ones that got handed to you—and list changes that your team designed, tested, or decided
 - Skip external changes, e.g. “Agency shut down,” “Weather”
 - List intentional changes, e.g. “Started diversion”

What prompted a change?

- For each change, jot down the main reason that your team decided to make it

Now consider your run chart

- Did those changes get results? Did it contribute to fewer people experiencing homelessness now?

**Teams get snagged when they try to
guess the next change**

We've learned to get less abstract, more concrete

Set an Aim [Click Here]

By December 31, 2017, managing a real-time by-name list of Veterans experiencing homelessness and increase our score to 5.

Select Strategies [Click Here]

>> LIST ALL KNOWN INDIVIDUALS: 1) Includes all populations of known veterans experiencing homelessness on By-Name List

>> IMPLEMENT AN INACTIVITY POLICY: 2) Has a documented and implemented inactive (no-contact) policy for veterans

>> TRACK STATUS CHANGES: 3) Tracks homeless status of all veterans, including the date of the last status change

>> COORDINATE OUTREACH COVERAGE: 4) At least 75% of Continuum of Care's geographic area is covered by a documented and coordinated outreach system

>> ASSIGN UNIQUE IDENTIFIER: 6) Veteran BNL includes an HMIS ID or other unique identifier to prevent duplication of client records and facilitate coordination between HMIS and BNL

>> INCLUDE VETERANS EXPERIENCING CHRONIC HOMELESSNESS: 9) By-Name List tracks all veterans who are experiencing chronic homelessness

Select Change Ideas [Click Here]

>> Develop a release of information form and data-sharing

>> Determine the length of inactivity threshold that makes

>> Map outreach efforts in your CoC geography by facilitati

>> If your by-name list is hosted separately from HMIS, dev

>> Track the following data: 1) presence of a qualifying disa

Define a process for cross-referenci

In your inactive policy, specify the nu

Designate by-name list fields for statu

Create a CoC-wide schedule to deter

To identify individuals at risk of becom

High Impact



Low Effort



High Effort

Low Impact

High Impact

The Impact-Effort Matrix:

- 👍 Helps you prioritize
- 👍 Helps you identify “costly” projects
- 👎 Not good for designing new changes
- 👎 Theoretical—it’s not about *actual people experiencing homelessness*

Low Impact

fort

**Let's talk about some practical ways to
find the next change**

Case Conferencing

Action Pack

Crucial elements:

✓ Optimize your notes + BNL

✓ Find your next
improvement project



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 <http://rchangeapackage.org>

Case Conferencing Action Pack

Setup your by-name list for case conferencing

See the section “Create fields to capture learning and commitments”

Key change idea:

Collect notes in the “This Week’s Obstacle” field (or your existing “Barriers” field)

Case Conferencing Action Pack

Center case conferencing in your system for improvement and learning

See the section “Find your next improvement project”

Key change idea:

Hunt for trends in your Obstacles/Barriers notes to find the change that will affect the most clients

Clients' obstacles tell you a lot

Last Entry Date	VI-SPDAT Sc	Veteran Status	Chronic Status	This week's obstacle
8/1/19	10	Veteran	Non-Chronic	
8/8/19		Veteran	Chronic	Cannot be found
7/30/19		Veteran	Non-Chronic	Filling out housing applications
7/17/19	5	Veteran	Non-Chronic	Filling out housing applications
7/9/19		Veteran	Non-Chronic	
		TTI		Landlord rejected app: rental history
4/18/19	5	Veteran	Non-Chronic	Cannot be found
6/20/19	7	Veteran	Non-Chronic	Landlord rejected app: criminal history
7/9/19	7	Veteran	Non-Chronic	Waiting for VASH team response

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7/23/19	5	Veteran	Non-Chronic	Housing search
7/18/19	7	Veteran	Non-Chronic	Housing search
6/20/19	7	Veteran	Non-Chronic	Landlord rejected app: criminal history
		TTI		Landlord rejected app: rental history
7/9/19	8	Veteran	Non-Chronic	No resource, not VA eligible
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**Sort by
obstacles**



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2 people can't be found

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2 people can't be found

4 people waiting at housing search

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2 people can't be found

4 people waiting at housing search

2 landlord issues, but...

Make it improvement work

- It's not just about a burst of reductions; it's about system change
- As you make changes, record your learning to apply it across the system

Let's practice

Get out your by-name list or case conferencing notes

- Scour your team's documents
 - Don't have a BNL on hand? Download one to play with: tiny.cc/fakebnl
- Find notes that will produce opportunities
 - Hint: Try sorting by different columns
- Pick 1-2 problems to solve (and prepare to share)

**Another source: Mine your
Performance Management Tracker**

Housing Placements

High values=Find a bright spot

- ❑ Were there particular strategies or process changes that led to more housing placements (e.g. new matching system, new agency at the table, increase or shift in outreach methods for finding people)?
- ❑ Did specific agencies / partners do anything different to increase their move-in numbers? Can their strategy be used with other agencies?
- ❑ Was there an increase in units? Was this because of a new partnership? How were they found / acquired?
- ❑ Did your community receive housing allowances / rent subsidies that led to the increase? Do you have any left? Can you acquire any more?

Housing Placements

Low value=Find a problem to solve

- ❑ What are barriers to getting people housed?
- ❑ Is housing stock low in your community? Can you determine that this is the actual cause?
- ❑ Are there bottlenecks in your process? Are people losing placements because they do not have the proper documentation upon applying for a lease? How can you make sure they have the appropriate documents so they can easily apply for housing.
- ❑ Are there any process gaps? Is there a particular intake, matching process, or program acceptance that is stalling the process of moving someone into housing? How can you bridge this gap?

Moved to Inactive

High value=Find a problem

- ❑ Something in your system is not working as effectively or efficiently as it could be.
- ❑ Is the list being updated correctly and in a timely manner? Are agencies adhering to the agreed upon timelines for data submission? Would a process training refresher help remedy this?
- ❑ How is your outreach strategy doing? Would it be beneficial to review your coverage system and hot spots?

Moved to Inactive

Low values=Find a bright spot

- ❑ What does your outreach process look like? Is there something in particular about your coverage / mapping system that ensures people are being found?
- ❑ What does your updating system look like? What makes it most effective and efficient?
- ❑ Are there particular communication strategies in place between agencies / partners in your community that ensure all people are accounted for and supported? Can these strategies extend to those agencies / partners who may not be communicating as well to even better improve your system?

Newly Identified

High value=Find a problem to solve

- ❑ Just starting out your BNL? Great! Connect with other communities to see what to expect in the first few months of having a BNL up and running.
- ❑ Did a specific event occur to spike your inflow like enumeration?
- ❑ Did you start a new outreach process that led to discovering new hot spots? Would it be beneficial to try this process elsewhere in your community to ensure people are being identified and supported?
- ❑ Are people aging into chronicity? What processes could be implemented to support those about to age into chronicity into housing before that occurs.
- ❑ Was there a data clean recently?
 - ❑ What did you learn from the data clean? Can what you learn enhance your BNL process?
 - ❑ If this number spiked because you realized you were missing people in your chronic population – that's great! It means you have successfully identified people in your community who need your support. Now that you know who they are, you can support them!
 - ❑ What prompted the data clean (e.g. a better understanding of the buckets, a routine scheduled data clean; staff turnover, etc.)?

Newly Identified

Low value=Find a bright spot

- ❑ What in particular has led to low inflow numbers? Is there a particular coverage or mapping system in place to ensure that your community has successfully identified people experiencing chronic homelessness?
- ❑ What strategies are in place to ensure that those who are about to become chronically homeless are housed before that occurs?

Returned to Active List from Housing

High Value=Find a problem to solve

- ❑ Did a specific event occur to spike this data point (e.g. fire, flood, property management change)?
- ❑ Is there a specific program / agency / landlord / property manager that is responsible for a majority of this value?
 - ❑ Is it related to the matching process at your case conferences? Should the eligibility of select programs / agencies be reviewed so that people are being connected to the most appropriate services?
 - ❑ Can you improve your relationship with a specific landlord / property manager?

Returned to Active List from Housing

Low Value=Find a bright spot

- ❑ Is there a specific agency / program that consistently has low numbers or better yet, does not have anyone *Returning from Housing*?
 - ❑ What does this agency / program do differently than others? Can their methods be replicated in other parts of your community?
- ❑ Is there a particular landlord / property manager that you have a strong relationship with that supports housing those who are experiencing chronic homelessness? Can this relationship be replicated with other landlords / property managers? Can this landlord / property manager recommend and refer you to others?

Returned to Active List from Inactive

High Value=Find a problem to solve

- ❑ Did you start a new outreach process that led to discovering new hot spots? Would it be beneficial to try this process elsewhere in your community to ensure people are being identified and supported?
- ❑ Did you recently solve a bottleneck in your process and you were able to make contact with people who previously were inactive on the BNL?
- ❑ Something in your system is not working as effectively or efficiently as it could be.
 - ❑ Is the list being updated correctly in a timely manner? Are agencies adhering to the agreed upon timelines for data submission? Would a process training refresher help remedy this?
 - ❑ How is your outreach strategy doing? Would it be beneficial to review your coverage system and hot spots?

Returned to Active List from Inactive

Low Value=Find a bright spot

- ❑ What does your outreach process look like? Is there something in particular about your coverage / mapping system ensures people are being found?
- ❑ What does your updating system look like? What makes it most effective and efficient?
- ❑ Are there any patterns you notice in having a low value? Is it the same people Returning from Inactive? How can you support them differently to ensure they don't continue to cycle through inflow and outflow?

Let's practice

Open your Performance Mgmt. Tracker

- bfzchangepackage.org pw: shiftshappen2019
 - Don't have a PMT yet? Use Bakersfield/Kern Co.
- Select the “Inflow & Outflow” tab at top
 - Hint: Try sorting by different columns
- Poke around the “Select Metric to Display” drop-down menu to find values that are trending high or low
- Pick a problem to solve—or find a likely bright spot

Ninon's words of wisdom for improvers

- Central tenet: People in their natural state are inherently creative, resourceful, and whole
- Give up a bit of control in exchange for (much) more collective power
- Attitudes don't change by themselves. They change when you experience something different.
- Give up the idea that you are terminally unique. Sorry... but it's true.

Feedback

Session: “Breakout - Build Your Next Improvement Project in Case Conferencing”

Survey Link:

<http://bit.ly/bfzrapid>

