

Align Participants with Shared Purpose of Action-Oriented Case Conferencing



October 22, 2019

Introductions



Anna Bialik
Community Solutions,
Built for Zero



Habiba Rotter
Community Solutions,
Built for Zero

Why are we
here?

**We observed that case
conferencing is frequently
*a missed opportunity...***

Why are we
here?

**We observed that case
conferencing is frequently
*a missed opportunity...***

**Some communities
figured out how to
make it their immediate
path to Zero** 

**Why are we
here?**

**We're here to
share with you**

How they did it..

**& How to make it
work for your
community**

Introduction

Agenda

Introduction



Build the Team

Introduction



Build the Team



Shared Purpose

Introduction



Build the Team



Shared Purpose



Facilitate for Action

Introduction



Build the Team



Shared Purpose



Facilitate for Action



Introduction



Build the Team



Shared Purpose



Facilitate for Action



**You'll leave
with
actionable
ideas and a
vision.**

Let's get to it!

About that case conferencing meeting...

How do we change it?



Build the Team!

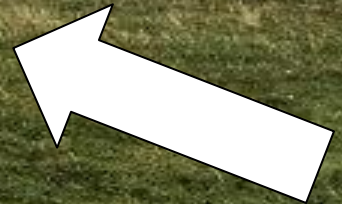
Build your objectives

Define success

FRAMING THE LANDSCAPE

Framing is
Everything!

MANY PEOPLE LOOK BUT ONLY A FEW SEE



Connect system-wide goals to Case Conferencing

Make Big Goals Real and Tangible

Make small goals along the road to FZ

How many people do we need to house per month to reach FZ? Who are they?

Start with your goal report @ every meeting!

Document your progress & your process!

"I BELIEVE NO HUMAN IS LIMITED" - ELIUD KIPCHOGE

01:59:40.2

FINISH

IN

Win your wins!



@eliudkipchoge

Introducing.. Case Conferencing Ninjas



Emma Beers
Chattanooga



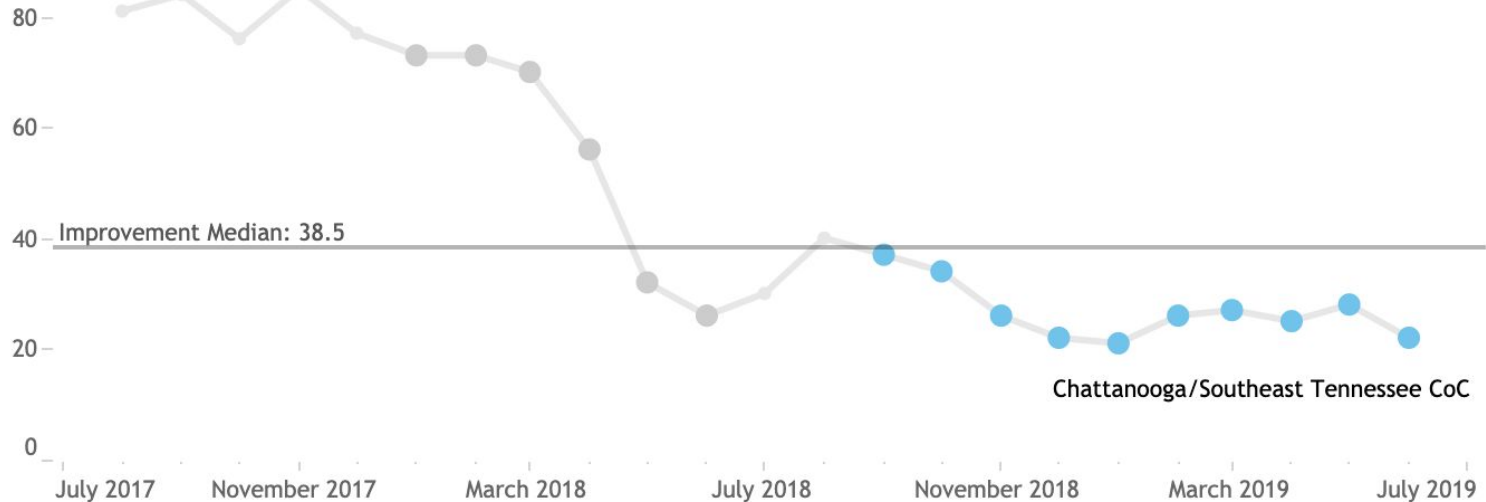
Erin Mangano
Cook County



Alexzandra Hust
Abilene

Chattanooga made their case conf. action-oriented

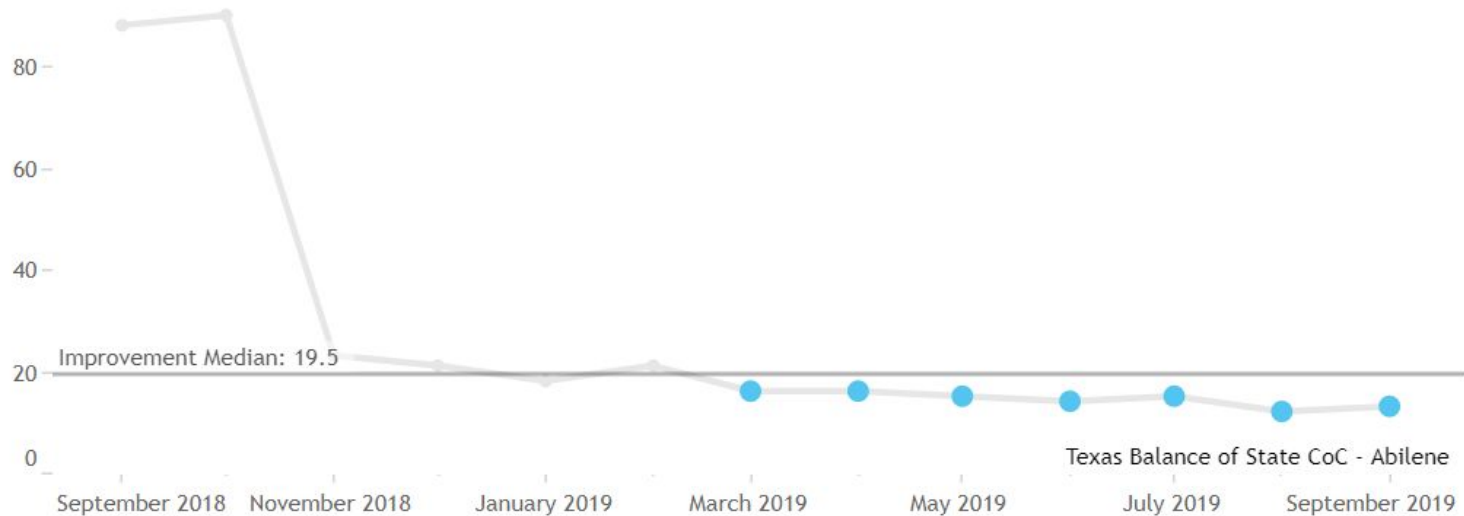
Actively Homeless Monthly **Veteran** data with signal indicators for **Shifts**



Chattanooga/Southeast Tennessee CoC

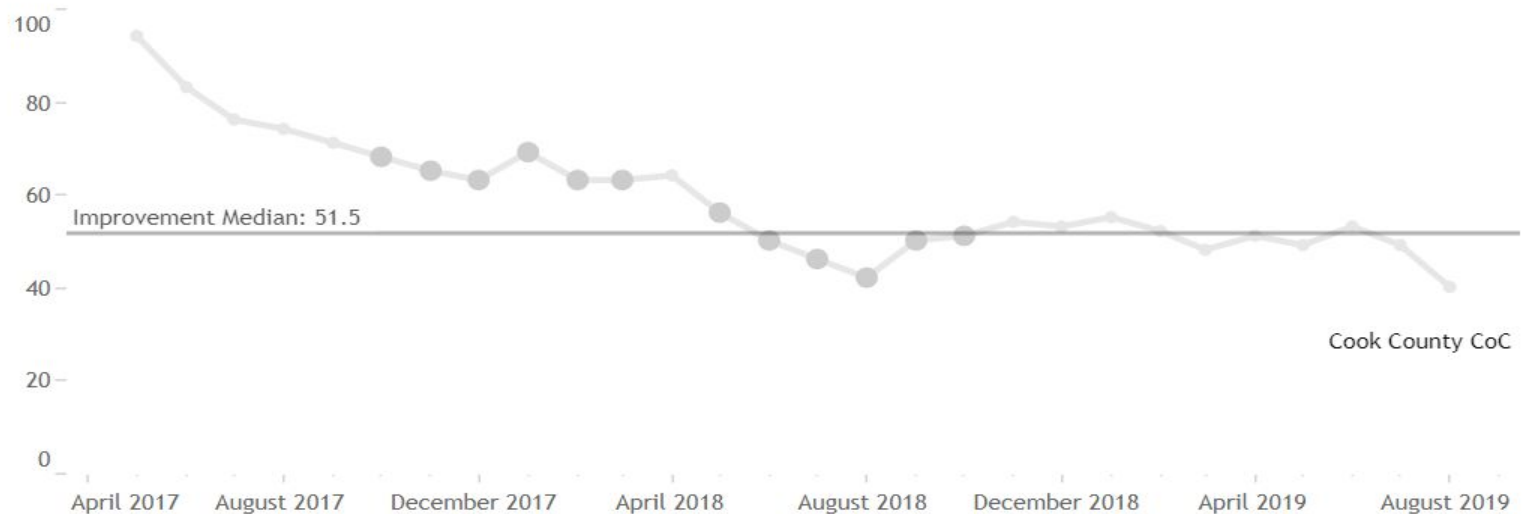
Abilene made their case conf. action-oriented

Actively Homeless Monthly Chronic data with signal indicators for Shifts



Cook County made their case conf. action-oriented

Actively Homeless Monthly Veteran data with signal indicators for Shifts



For the next 10 minutes::

Pick two or three next steps that you can take to Build the team, Set objectives for your meeting, and connect system-wide goals to case conferencing.


When will you take these steps?

Put it on your calendar!

Facilitate For Action

**We heard you say case
conferencing is a meeting
where not much gets *done***

**The focus is updates,
problems, or
brainstorming that's not
actionable**

An astronaut in a white space suit is floating in space, positioned on the left side of the frame. The background is a vibrant, colorful galaxy with purple, blue, and pink hues, filled with numerous stars. A faint grid pattern is overlaid on the galaxy. The astronaut's right leg is extended downwards, and their right foot is visible, wearing a white boot with black laces. The text is overlaid on the right side of the image, partially obscuring the astronaut's body.

**With some
action-orientation, it can
become the thing that
makes you house clients
astronomically faster**

**Simple changes that
move the needle...**

Meet frequently

BNL Housekeeping

Make your list visible and shareable: people engage with what they can see

Add fields that push towards action (& remove redundant ones)

Ask someone who is not the facilitator take notes

FIELDS FOR ACTION

Client Basic Info	Status	This Week's Barrier	Next Step	Who	By When	Target Move-In Date 
Name, HMIS ID, DOB	<ul style="list-style-type: none">• In outreach• Enrolled• Vouchered• Housing Navigation	What is the next obstacle to overcome in the system to get them housed?	What is one thing we can do to get them to move past this obstacle?	Who will do it?	Who is committing?	If we challenge ourselves to house this client as fast as possible, how soon can it happen?

Wait, Target move-in dates?

- Ask this question: **If we push to house this client as soon as possible, what's a target housing date we can predict for them?**
- It's a prediction: it helps you get more ambitious!
- It's a self-challenging tool
- It creates commitment and ownership

Explain the rationale to your team to get their buy-in

Stay Laser Focused



**Avoid
discussing too
many clients
in one
meeting**

Try this basic facilitation flow:

State the client's name and the previous "next step"



Ask what action has been taken to house the client since then



Define the largest obstacle the client is facing this week

Record a new next step to move them closer to housing



Record or edit the target move-in date



Plan for each client



**Facilitating for behavior
change**

Challenges to Expect

1. **Problem-saturated thinking** - Discussing everything wrong with the client with no solutions
2. **Provider territoriality** - “My client” v. “Our client”
3. **Unmotivated thinking**, a.k.a Status quo thinking - Setting next steps too far out

Challenges v. Strategies

Problem-Saturated Thinking

Facilitate For Problem Solving

Provider Territoriality

Facilitate For Teamwork

Unmotivated Thinking

Facilitate For Urgency

Facilitate For Problem Solving

V. Problem Saturated narratives

Ask solution-focused questions:

“What is one thing we haven't tried yet that we can try this week?”

“What's one action step we can take to get them to reach their next milestone?”

Listen for change talk and reflect it

“I'm hearing you say this client is experiencing a lot of challenges. I also heard an opportunity there to try X.”

Facilitate For Teamwork

V. Provider Territoriality

Once you figure out together what the client needs next, pull in other team members to help

Example: Client A has a voucher ready but would like to live in South County, where the provider agency doesn't usually work. Suggest that a South County agency help with housing navigation and record the commitment under "next steps".

Facilitate For Urgency

V. Unmotivated Thinking

Always use the operative question, “How do we get this next step to happen faster?”

Target move-in dates are a catalytic tool for this!

Listen for redundant steps, suggest consolidating them. Ex: “I wonder if it would make sense to combine this client’s intake and enrollment appointments”

Introducing.. Case Conferencing Ninjas



Emma Beers
Chattanooga



Erin Mangano
Cook County



Alexzandra Hust
Abilene

Challenges v. Strategies

Problem-Saturated Thinking	Facilitate For Problem Solving
Provider Territoriality	Facilitate For Teamwork
Unmotivated Thinking	Facilitate For Urgency

On your handout, you'll see a common scenario that frequently happens in case conferencing..

With your table, think about:

What is the challenge here and what signified it to you?

What are some clarifying questions you might ask?

What are some facilitation strategies and questions you might use?

Share out + Q&A

**Remember: We're changing processes,
but what we're really shifting is human
behavior..**

- ★ Don't be discouraged, habits take time to form
- ★ Use co-creation language
- ★ Pace & lead

How do you know the changes you made are working?

★ Number of next steps

★ Number of target housing dates

★ Increase in housing placements

★ Decrease in actively homeless number

You don't have to be the facilitator



You can be a case conferencing ninja, too.

Thank You!

Feedback

Session: “Breakout - Align Participants with the Shared Purpose of Case Conferencing”

Survey Link:

<http://bit.ly/bfzrapid>

