Case Conferencing Academy 2023

Module 1: Getting Started

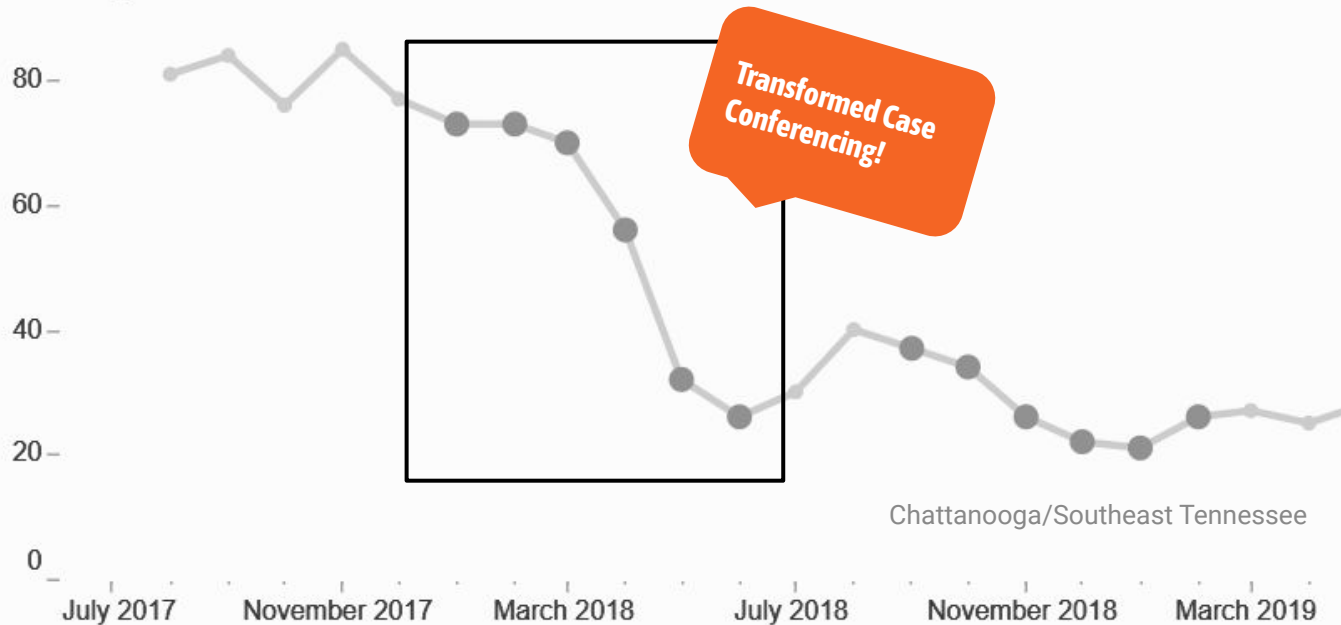May, 2023

Built For Zero.

COMMUNITY SOLUTIONS

Case conferencing is a game-changer

90% of participants in our Case Conferencing Transformer Cohort saw an improvement in their monthly housing placement rate

What we mean when say 'case conferencing'

Action-Oriented

Case conferencing meetings should ultimately be centered around one goal: to **move people experiencing homelessness into housing** as quickly and sustainably as possible.

To make that happen, these meetings need to be centered around identifying actionable next-steps with ambitious deadlines.

Measurably Effective

Case conferencing meetings should be regularly evaluated to **ensure that the practice is an effective way to reach your desired outcomes**.

Not only should you see impacts around Length of Time measures, or Housing Placement Rates, but you should also see impacts on the overall experience of attendees.

Team Building

Case conferencing meetings should **create a culture of knowledge-sharing and mutual support**. Your meeting should be a safe space for attendees to ask for, and offer, support as needed.

When your team culture is healthy, your team is more motivated, and there's shared accountability without autocracy, which allows for more effective, and more sustainable, service coordination.

What we DON'T mean

A Reporting Meeting

There's a reason we want everyone in attendance. It's not to ask people for favors, or to report-back on progress, it's to pull on the collective genius of the group.

Tip: Ask everyone to submit updates on the next-step identified at the previous meeting 24 hours before the upcoming meeting.

A Referral Meeting

Coordinated Entry referrals should be happening live whenever possible.

Each week you wait for a meeting to make a program referral is another week someone spends experiencing homelessness.

Tip: If referrals can't be done through HMIS, create a process where referrals happen via email, and create a flowchart to help agencies navigate the process.

An Email

If you did the math, how much would this meeting be costing you? Are you providing enough value to justify it?

Keeping an open feedback loop helps you gauge what value the meeting offers, and in what ways it could be improved to provide more value.

Tip: If meetings do feel like they could be an email, that just means it's time to test something new! Solicit feedback from attendees to come up with creative ways to improve it.

COMMUNITY SOLUTIONS

Let's talk about your improvement goal

If you're reading this, set a goal

If you're going to do the hard work of making your meeting action-oriented, do it right and set a goal to increase your **housing placement rate** for a target population

Each improvement team should set a goal, not each individual!

We'll walk you through it step by step

A nugget of goal psychology

Leading a change requires motivating and influencing people—that's *people work*

We don't do *people work* to achieve goals;

We set goals in order to do better *people work*

Your goal matters to clients

If you use this training to improve your housing placement rate, it means that clients will spend fewer days experiencing homelessness

We know that the longer a person is homeless, the more likely it is that they'll age into chronicity.

If we speed up our housing placements, we have the potential to see better long-term outcomes

We'll test changes to make case conferencing house clients faster

Your goal matters to staff

There's no shortcut: Meeting your goal will require orchestrating effective communication and collaboration between individuals and agencies

What does that look like? Colleagues treating each other kindly. Teams getting clear on priorities. Conversations moving toward purposefulness

So improving this meeting means establishing a more joyful, more rewarding work culture

We'll test changes to make case conferencing people's favorite meeting

How to decide on your goal

1. Pick your subpopulation to measure
   You'll focus on that housing placement rate—and case conferencing meeting

1. Take your 3-mo. average housing placement rate from your **Performance Management Tracker (PMT)** and increase it by whatever percentage feels *ambitious* but *achievable*
   If you need help setting a goal, talk to your BFZ coach!

2. Document your goal

Let's track progress to your goal

Making changes to your meeting

Once you set your goal, it's time to figure out what barriers stand in the way, and start testing changes to solve for them.

We've created the **Changes Roadmap** to help you identify change ideas to test, based on the aspect of the meeting you're working on.

Collect data as you test, take notes, and then use the Changes Roadmap to **track what you learned**.

Case Conferencing Transformer: Changes Roadmap

FACILITATE THE CONVERSATION

Ask consistent questions about each client to promote action and learning	Not Yet	Sometimes	Perfectly	What did you try?	How did it go?	How will you make it stick?
"Where is this client in the housing process now?"						
"What can we learn from the action steps discussed last time?"						
"What in our housing process is the client's main obstacle this week?" Remind your team that in this conversation we'll focus on barriers over which we have control. That means putting obstacles that refer back to the client, such as "They are drinking."						
"What's the next action step we'll take? Who will do it, by when?" You may have multiple action steps per client.						

Set target move-in dates to enable learn

Ask about each client, "Given what w
Setting a target move-in date is an in
gauge clients' flow through your syst

When someone sets a target move-i
part of the process that can be done
Brainstorm creative new answers to

Build provider buy-in by framing targ
judgment. When you set and review
housing strategies that work, identifi
housing placements.

What did you try?
Introduced target move-in dates, and asked case managers to set a taget move-in date for each client.

How did it go?
People set target move-in dates, but they weren't very ambitious. GPD set target move-in dates 2 years out.

How will you make it stick?
Using the tally sheet to create shared ownership over collecting target move-in dates.

Chose a test

Made a plan

Took notes

Made a change

Learning from your changes

How do you know if a change was an improvement?

You see it in your **DATA.**

Data submissions are the key to learning what's working, and what's not.

What's next

Next Steps

Before moving on to Module 2:

- Set your improvement goal and email it to your BFZ coach
- Catch up on reporting data into the Performance Management Tracker if you haven't already!