Case Conferencing Academy 2023

Module 2: Facilitation

May, 2023

Built
For
Zero.

COMMUNITY
SOLUTIONS

Beyond facilitation: becoming a local leader

Built For Zero.

Facilitation is people work

People work doesn't serve your goal;
      goals you set are a tactic to serve your people work

How it can feel as a facilitator

Like you're missing the authority you need to lead the team to do their best work.

Like you face resistance in rallying the team around your community goals.

Disconnected from the work that the rest of the team is doing.

Like you're on an island alone because you're the only one with the capacity to lead.

Qualities of effective leaders

They're **Persuasive**

Others want to follow their lead.

They're **Uniting**

They help to foster team camaraderie.

They're **Resourceful**

They provide value beyond facilitation.

They're **Supportive**

They equip others to take the lead.

Exercises to refine your leadership style

1 Interview a Mentor
Talk to a leader that has influenced your professional development.

- If you can, talk to a leader that you respect that has impacted your work experience and ask what they prioritize in their leadership.

- Talk to another leader who has watched you in action and ask what qualities they saw in you.

2 Use Active Listening
Meet with fellow staff to learn more about what they do, or what pain points they're experiencing.

- Sit down with staff that seem burnt out and practice active listening with them: pay attention, demonstrate that you're listening, and reflect back what you hear.

- Sit down with a client who seems service-resistant and try to listen to identify where their hesitation is coming from in order to lower barriers to housing.

3 Study Leadership Styles
There have been a number of studies on leadership styles you can dig into.

- Task-oriented leadership focuses on meeting objectives.

- Person-oriented leadership focuses on the relationship between leaders and those they lead.

Facilitating for change
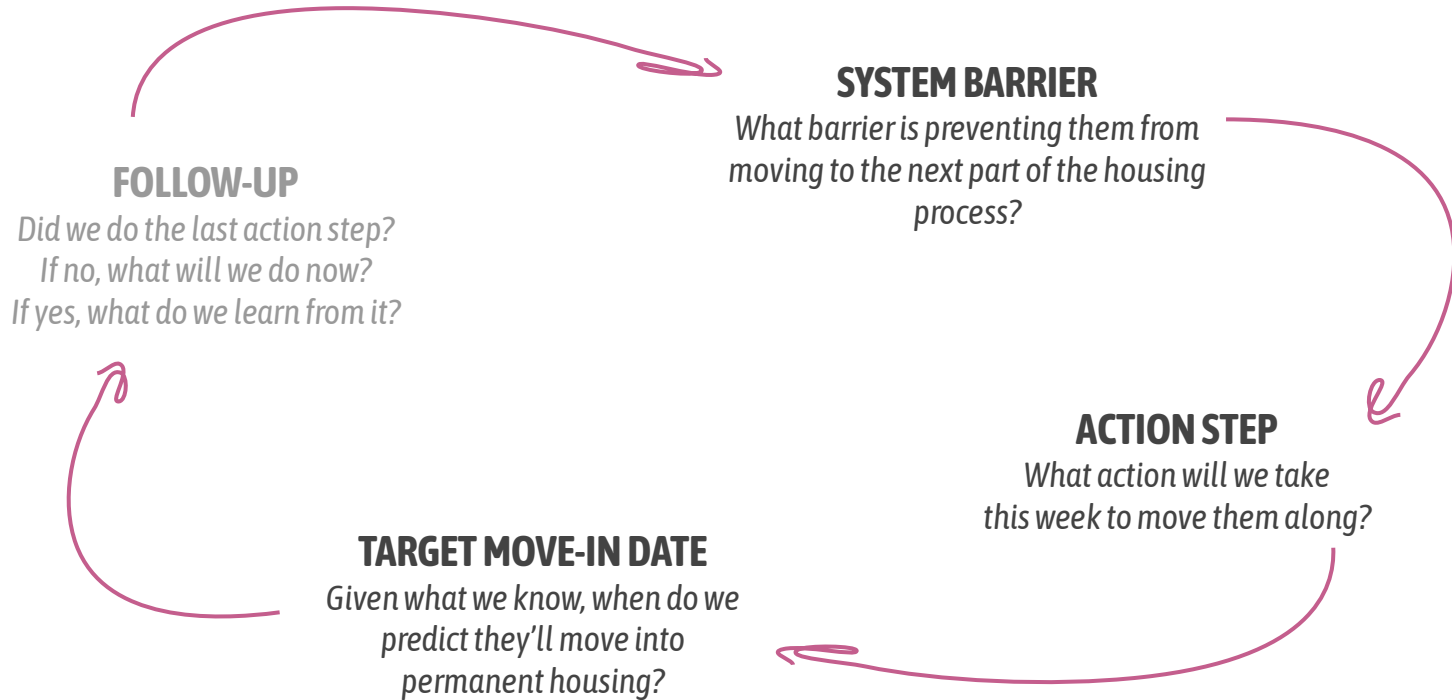
Change idea #1: Prepare for your meeting

3 Days before meeting	2-3 Days before meeting	1 Day before meeting	
Determine who you will be discussing during the meeting and align the selection with your community goals.	*Share the BNL with your Case Conferencing team*	*Draft your agenda*	**Have an amazing Case Conferencing Meeting!!!**
Clean your BNL!	***Request Updates:*** ***-Add new Individuals to the list*** ***-Update the housing status*** ***-Update actions taken and any other client updates.***	*Line up a scribe and a timekeeper for your meeting.*	
Review your data!	*Thought partnership and problem solving in getting started*		

Change idea #1: Prepare for your meeting

Topic	Guidance	Time
Introduction & Team Strengthening	Ask the team to share their name, agency and role in the housing process Ask a warmup questions that will help with team building	10 minutes
Goal Statement and Meeting Framing	**Share your long-term system goal (Reduction, FZ, QBNL) and the milestone goal for this month**	2 minutes
Data Share-Out and Celebrating Wins	Share out the data that matters most: AH#, Inflow # so far for the month, #, Outflow #. Housing Placements since last meeting, Housing Placements by race/ethnicity. Celebrate - Share out the client's name as well as the staff members who housed them. Get Creative! Make it fun!	5 minutes
Generate Client Housing Plans	Pre-plan who will be discussed. Learning Loop: State the client's name, Action since last meeting, System barrier, New Action Step, Target Move-in Date.	45 minutes
Announcements	General updates on programs, vacancies, etc. go here.	5 minutes
Lock in Action Steps	Reiterate when will the action steps happen. Invite team members to document action steps on their to-do lists or calendars.	3 minutes

Change idea #2: Use the Learning Loop

SYSTEM BARRIER
What barrier is preventing them from moving to the next part of the housing process?

FOLLOW-UP
Did we do the last action step?
If no, what will we do now?
If yes, what do we learn from it?

ACTION STEP
What action will we take this week to move them along?

TARGET MOVE-IN DATE
Given what we know, when do we predict they'll move into permanent housing?

Change idea #2: Use the Learning Loop

- "What is your theory of what needs to happen, from A to Z, in order for this person to move into housing?"

- "What is your next step in housing them?"

- *Essential question for long-stayers:* "What is one thing we haven't tried yet that we can try this week?"

- "What is one way we can speed up this step?"

- "Who can we pull in to help generate new options?"

Change idea #3: Test target move-in dates

When your team estimates client move-in dates, you see benefits:

- Build a culture of accountability in the team

- Celebrate and duplicate successes, when a client moves in as predicted

- Alert you to process bottlenecks, when a client does not move in as predicted

- Provide a double-check on your next action step
  - If the date is far out, can we rethink this week's action step?

- Forecast housing placement rate
  - Count target move-in dates set for the next 30 days to get a solid estimate of your housing placements

Change idea #3: Test target move-in dates

Emphasize that the practice generates data for learning, not judgment!

Tweak it to Target Milestone Dates, if needed, depending on your meeting's scope and objectives

Start small: Try setting target move-in dates for only 5 clients in the first meeting so that your attendees get comfortable using the Learning Loop

What's next

Next Steps

Before moving on to Module 3:

- Update your meeting agenda to drive action
- Test out the learning loop in your meeting
- Implement target move-in dates with 5 clients