



# Case Conferencing Academy 2023

## Module 3: Team Alignment

May, 2023

Built  
For  
Zero.

COMMUNITY  
SOLUTIONS

**Change idea #1: Establish a shared goal**

# Types of objectives

- **Rational objectives**
  - Learn how to facilitate a team conversation to develop rational and experiential objectives for your case conferencing meeting(s)
  - Understand the importance of aligning your meeting invitation list with these objectives.
- **Experiential objectives**
  - Feel excited to set objectives for your case conferencing meeting with your team.
  - Feel prepared to make changes to the way you facilitate case conferencing, based on the objectives that you set.

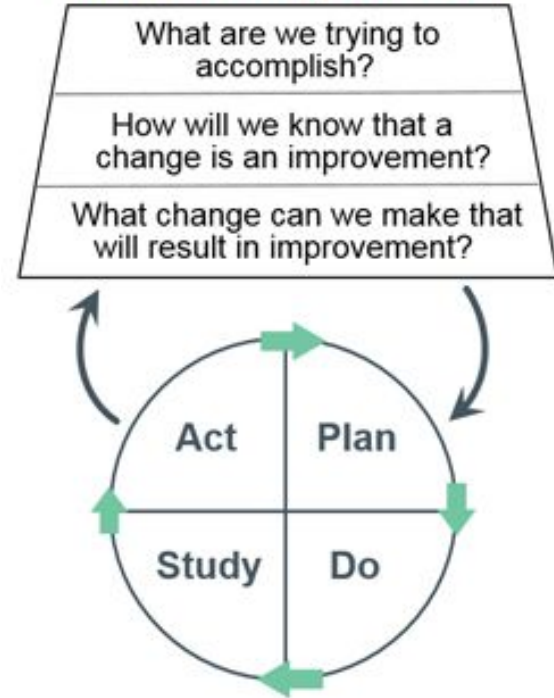
# The value of rational objectives

A good **rational objective** will:

- Build a shared sense of purpose among your group
- Help you measure success
  - #1 objective should be housing people faster, and more stably
  - Brainstorm additional objectives with your group

Try to keep it to two objectives!

## Model for Improvement



# The value of experiential objectives

A good **experiential objective** will:

- Ensure that you're taking care of your meeting attendees
- Spark creativity. This is your chance to design a meeting that's fun and cool.

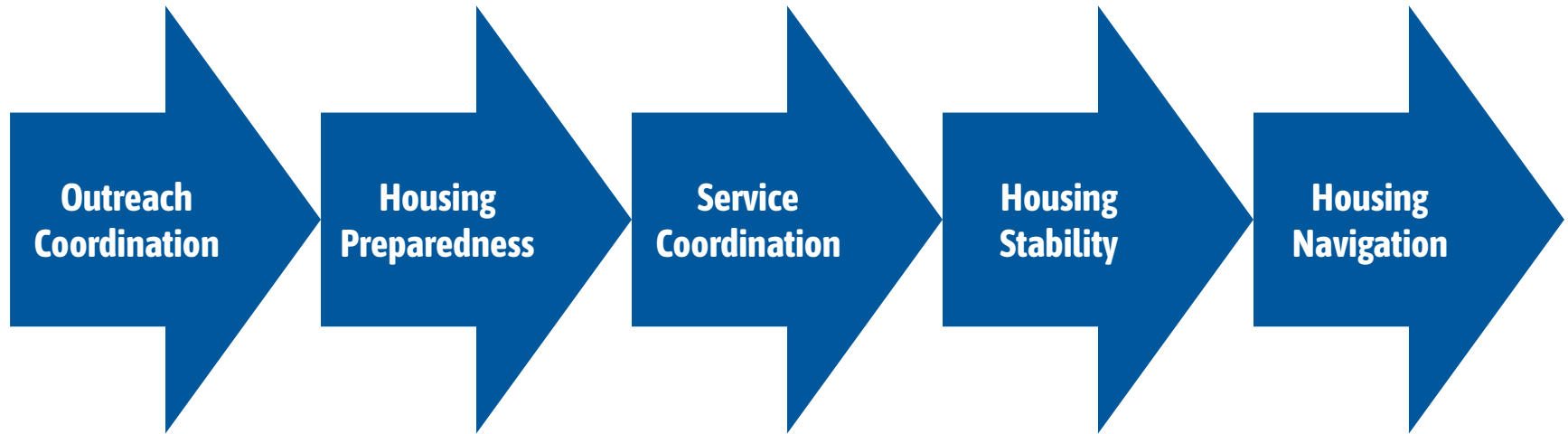
Common experiential objectives:

- Everyone contributes
- Feel a sense of community among the group
- People look forward to the meeting, etc.

**Change idea #2:**

**Get the right people to the table**

# Functions of stakeholders



# Types of stakeholders

## Population: Chronically Homeless

Program	Staff Role	Value	Additional Value
PATH	Outreach Specialist	Outreach Coordination	Housing Preparedness
CoC/ESG	PSH Case Supervisor	Housing Stability	Service Coordination
CoC/ESG	RRH Case Supervisor	Housing Stability	Service Coordination
Medicaid	Case Manager	Service Coordination	Housing Stability
Any	SOAR Case Manager	Housing Stability	
DOL	Employment Specialist	Housing Stability	
CoC	Coordinated Entry Specialist	Housing Stability	Community Buy-In
Any	Housing Navigator	Housing Navigation	
CABHI	Case Manager	Housing Stability	Service Coordination
Local Gov't	Legal Aid	Housing Navigation	



**Change idea #3:**

**Empowering others to take charge**

# Create succession plans

What actions can you take to ensure that the meeting runs well when you're not there, and to welcome new staff and help them feel a sense of ownership?

- Write down your standard operating procedures
- Ask your most helpful, dynamic participants to schedule a 1:1 with incoming staff
  - Explain what the purpose of the meeting is—for clients, for staff
  - Model how to add and receive value from the meeting

# Fill roles assertively

Giving people a “job” helps them invest in the team

Think carefully about rotations

Doing a task repeatedly makes you good ‘n reliable!

If a task is too burdensome, you may want to break it up

# Jobs in your meeting

- **Facilitator**

**Key Indicator of Success:** High-quality next-steps are collected for each client

- **Scribe**

**Key Indicator of Success:** Learning Loop fields are updated on the BNL for all clients.

- **Timekeeper**

**Key Indicator of Success:** The meeting concludes on time without skipping or rushing through any agenda items.

**What's next**

# Next Steps

## **Before moving on to Module 3:**

- Establish shared objectives for your meeting
- Clean up your invitation list
- Test out using the 3 team roles