

A stylized illustration of a modern building interior. The scene is composed of various geometric shapes and levels, creating a sense of depth and movement. In the upper left, a person stands on a platform holding a glowing orb. In the center, a person in a wheelchair is being assisted by another person. To the right, a person stands on a higher level, gesturing. In the lower right, a person is walking up a wide staircase. The color palette is primarily warm, featuring shades of orange, brown, and white, with a prominent blue banner across the middle. The overall style is clean and modern, emphasizing human interaction and architectural design.

Case Conferencing Academy 2023

Module 4: BNL Infrastructure

May, 2023

Built
For
Zero.

COMMUNITY
SOLUTIONS

Change idea #1:

Visualize the housing process

The process bucket principle

Visualizing the housing process allows you to,

- **Create clarity** around next steps
- Collect better data, to **identify system-level bottlenecks**
- **Narrow participation requests** for meeting attendees
- **Cover more clients** in your meeting

Here's what your list will look like

IDENTIFICATION

ASSESS

To advance clients to the next bucket:

- Complete assessment

28 clients

MATCH

To advance clients to the next bucket:

- Match to resource, program, or housing plan

56 clients

NAVIGATE

To advance clients to the next bucket:

- Locate housing and get moved in

13 clients

MOVE IN

A bucket may contain many small actions

ASSESS

- Engage
- Connect to services
- Build relationships btw. staff and client
- Complete housing needs assessment
- Prioritize

Complete assessment

MATCH

- Collect vital docs
- Continue MH/DA treatment
- Connect to employment or SSI/SSDI benefits
- Apply for PHA assistance

Match to resource, pgrm, or housing plan

NAVIGATE

- Identify unit
- Identify roommate
- Apply for furniture voucher
- Apply for deposit assistance

Locate housing and move in

MOVE IN

DOWN HERE ARE
THE DECISIVE STEPS
TO MOVE FORWARD

Sectioning your meeting: Assess

Objectives

The objective for clients you discuss in this section is to **actively engage clients in need of assessment, or clients who have disengaged with their primary case manager.**

This process bucket can be expanded to include anyone in need of engagement if clients frequently become disengaged in later stages.

Target Participants

- Outreach teams
- Supportive services case managers
- Shelter staff

ASSESS

To advance clients to the next bucket:

- Complete assessment

Sectioning your meeting: Match

Objectives

The objective for clients you discuss in this section is to **identify a housing plan that matches a client's eligibility, and preference.**

The housing plan may center around entry in a supportive housing program, the acquisition of a public housing voucher, or a plan to maximize self-earned income.

Target Participants

- Housing case managers
- SOAR liaisons
- Career center staff
- Public housing staff

MATCH

To advance clients to the next bucket:

- Match to resource, program, or housing plan

Sectioning your meeting: Navigate

Objectives

The objective for clients you discuss in this section is to **support the client in identifying, and moving into, an appropriate residence.**

While this process bucket specifically focuses on getting clients into housing, it may make sense to discuss complementary stability strategies for clients who won't have a case manager assigned to them after housing move-in.

Target Participants

- Housing navigators
- Landlord liaisons
- Associated case managers
- Outreach/shelter staff who are able to help with moving activities

NAVIGATE

To advance clients to the next bucket:

- ☐ Locate housing and get moved in

Change idea #2:

Set up your by-name-list for improvement

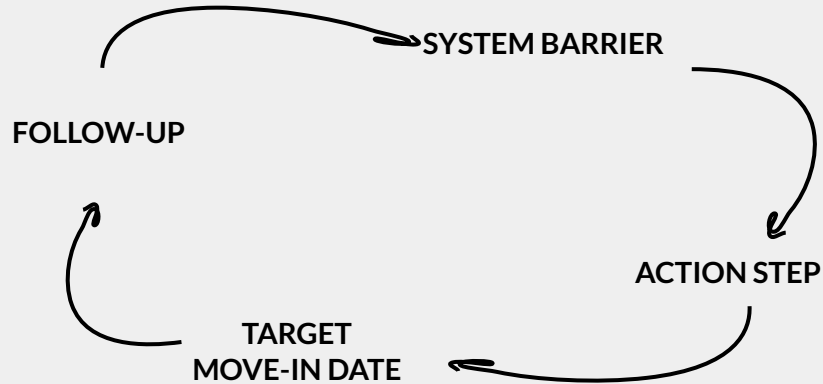
Tracking housing process buckets

Bucket	Data Status Changed
Income Maximization ▼	10/30/2020
Housing Navigation ▼	10/30/2020
Outreach ▼	11/2/2020
Outreach ▼	9/27/2020
Income Maximization ▼	3/13/2020
Outreach ▼	11/9/2020
Housing Navigation ▼	11/10/2020

How to implement the bucket system:

- Identify the unique phases in the user journey based on their primary need.
- Add 2 columns in your BNL:
 - Bucket
 - Date Status Changed
- Update the clients' Bucket, and Date Status Changed

Using your BNL



Format your BNL for action

- Make it simple to look at; eliminate redundant columns
- Include the Learning Loop columns that spur action & use them to document tests:
 - Current System Barrier
 - This Meeting's Action Step
 - Staff Responsible
 - Target Move-In Date
- Share it with the team to help everyone take ownership

What we can learn from case conferencing data:

1) System Bottlenecks

By tracking the length of time between stages in the housing process, you can identify and problem-solve for system-level barriers.

2) Goal Forecasting

When you collect target move-in dates on every client, you can forecast whether or not you'll meet your monthly housing placement goal.

3) Bright Spots

You can also track length of time between buckets in order to celebrate staff, or agencies, that consistently perform well.

What's next

Next Steps

Before moving on to Module 5:

- Identify your local process buckets
- Add fields for documenting the facilitation loop and buckets prompts
- Document client status each meeting!