

Built For Zero.

Case Conferencing Summit

2020

Become a Master

Facilitator of

Case Conferencing

November 17, 2020

Your trainer for this session



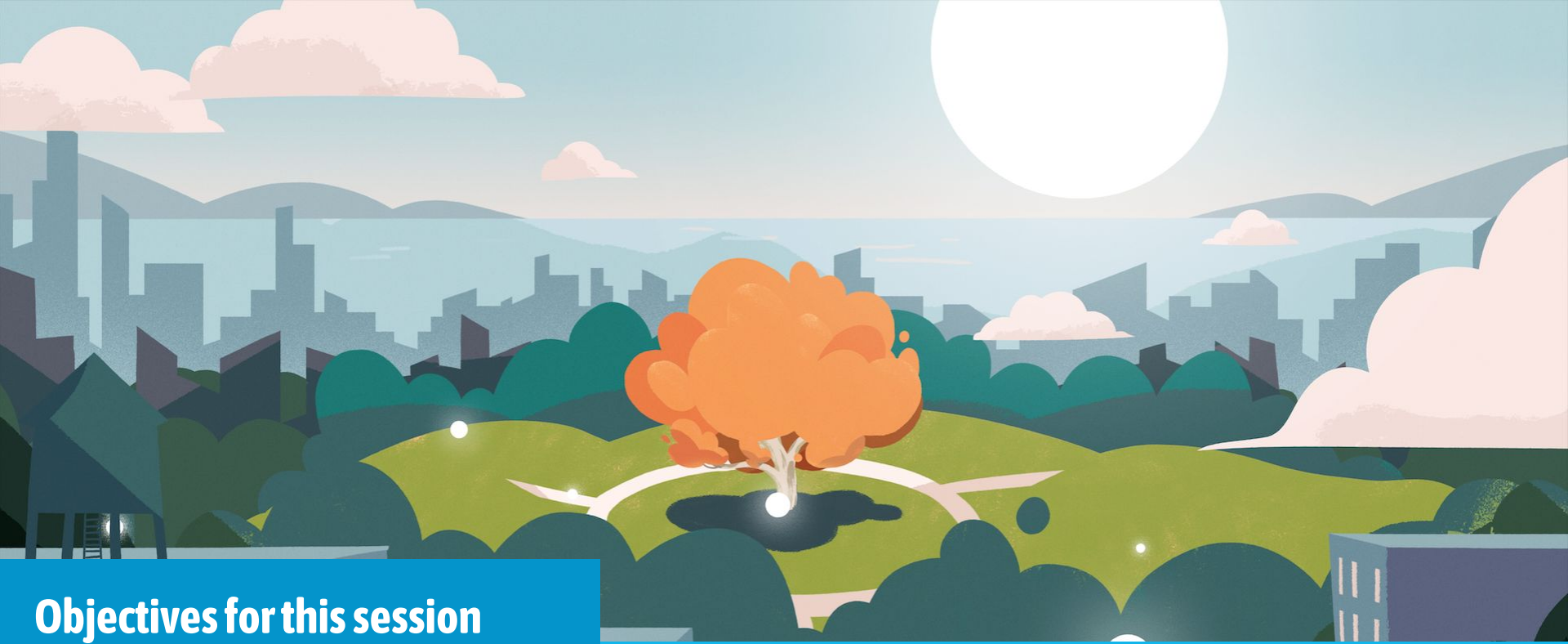
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Objectives for this session

- Learn about the three biggest people dynamics in case conferencing
- Build facilitation skills to turn them into opportunities

Case Conferencing Tool Bank now online



 POINT YOUR PHONE CAMERA HERE

This week we're bringing to life resources from the new **Case Conferencing Tool Bank**

- 12 new resources to improve every aspect of your case conferencing practice
- Slides from this session—on Wednesday
- Get info about a 3-month case conferencing improvement cohort starting in January 2021

A stylized illustration of a city skyline with a rising sun and clouds. The sun is a bright orange circle with rays, positioned in the upper center. The sky is a light blue with large, soft, white and pinkish clouds. In the foreground, there are stylized buildings in shades of blue and white, with some buildings having a grid-like pattern. The overall style is modern and artistic.

In the chat, tell us two things:

- You community
- Your most challenging people dynamics in case conferencing

**Action-oriented case conferencing
is about behavior change**

**Facilitation is negotiation—
in a good way**

Let's turn three problems to opportunities

1 Problem-Fixated Narratives → **Generating Actionable Solutions**

2 Provider Silos → **Moving from “My Client”
To “Our Clients”**

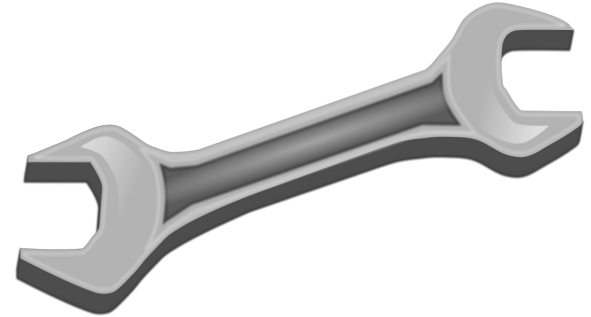
3 Slowed by System Barriers → **Housing with Urgency**

Tools in your toolbox

**Setting
Expectations**



**Facilitation
Strategies**



Generating Actionable Solutions

Solving for problem-fixated narratives

Stuck on problem narratives

This work can be hard as frustrating!

As a result, teams can get stuck discussing barriers, what's going wrong with the client, or how it's impossible to accomplish progress with them.

**It often sounds like
absolutist language**

"I've tried everything"

"Nothing is working"

What's the opportunity?

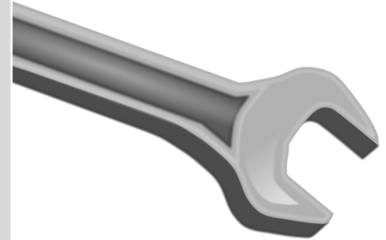
Sharpening your facilitation will help you—

- Solve real problems for real clients
- House clients better, easier, and faster
- Deepen the meeting's sense of purpose

Setting Expectations

Use team strengthening time in your agenda to prep people for action:

- **Be transparent** about what this meeting is for: finding housing solutions
- **Create a contrast** with unproductive meetings
- **Establish norms** about what are acceptable ways to talk about clients
- **Encourage providers** to look for barriers within the housing system, rather than within the client



Facilitation Strategies

**Empathetic
reflections**

Show them you care

**Forward-looking
questions**

*Help spot the
opportunity*

**Narrow questions
+ milestones**

*Make the problem
smaller*

Facilitation Strategies



Empathetic reflections


Show them you care

Sound like..

- “This client’s been on our list for a long time now, and you’ve been working so diligently to house her”
- “I can only imagine what that’s like to have tried so much: tough and frustrating”

Pro tip: Be genuine in your reflections. The more you can truly empathize with your team, the more responsive they will become.

Facilitation Strategies



Forward-looking questions

Help spot the opportunity

Sound like..

- “Given how rough it’s been, what’s an opportunity we can spot there to engage this client?”
- “What’s something we haven’t tried before that we can test here?”

Pro tip: You can also offer direct support or tips when appropriate.

Facilitation Strategies



**Narrow questions
+ milestones**

*Make the problem
smaller*

Sound like..

- “What’s the barrier in our system that this client is facing right now?”
- “So what’s the thing that needs to happen next for this client to be one step closer to housing?”

Facilitation Strategies



**Narrow questions
+ milestones**

*Make the problem
smaller*

Common system barriers

- Needs Engagement
- Needs Assessment
- Needs Documentation or Verification
- Needs Program Enrollment
- Needs Subsidy
- Needs Unit

Facilitation Strategies

When in doubt, stick to the Learning Loop:

**Narrow questions
+ milestones**

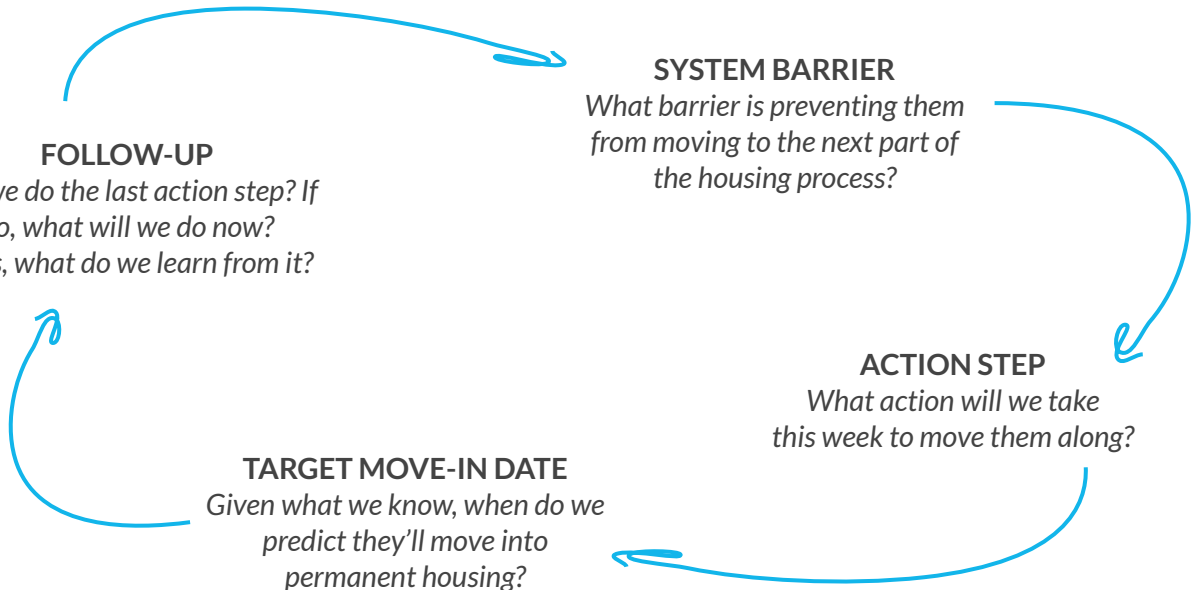
*Make the problem
smaller*

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

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

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?*



Moving from 'My Client' to 'Our Clients'

Solving for provider silos

Stuck in provider silos

Have you ever attended a meeting where it felt like each team member was on an island with their own clients?

**It often sounds like
shutting down**

“We’re working with them”

Terse updates

**Talking only to the facilitator,
not other providers**

What's the opportunity?

People on your case conferencing team may come from different agencies, but they should have one mission: Ending homelessness.

While it is not on everyone's job descriptions to know and care about all clients in the community, it is their moral imperative.

When case conferencing becomes a place where everyone's superpowers are used to house clients quickly, it offers incredible value and makes people feel like a true team.

Setting Expectations

Use team strengthening time in your agenda to prep people for collaboration:

- **Name the meeting as a collaborative space** where everyone's superpowers are used to get the best outcomes for clients. Encourage sharing ideas, no matter how silly or 'out there.'
- **Frame your role as a facilitator:** Be open about the fact that you ask questions to find opportunities, not to establish authority
- **Identify what value they will get:** Teams who have a shared understanding of the meeting's collaborative purpose feel more fulfilled, less lonely, and house clients easier



Facilitation Strategies

**Reflect
opportunities +
make
suggestions**

*"I wonder... I'm curious...
I imagine"*

**Know people's
strengths**

*Inventory what each
provider is good at*

**Become an
opportunity
matchmaker**

*Suggest how people
can help each other*

Facilitation Strategies

Reflection

"It sounds like the client is wanting a unit in *X county*, where you don't usually do much housing navigation.

I wonder if *X person* from *X agency* can share a few unit options with you."

Curious language

Housing with Urgency

Solving for slowness from system barriers

Housing with urgency

Here is an often unspoken fact about our homeless services systems:

They are designed to manage homelessness, not end it

To interrupt this dynamic, we should take action to house clients faster. This makes our teams feel excited and motivated as MVPs in ending homelessness

<Ins: Urgency at housing system, not staff. They have enough already!>

**It often sounds like
housing is far away**

Can't set target move-in dates

**Target move-in dates are
far in the future**

Litany of tasks before housing

Where urgency gets you



The deeper “why” beneath urgency

The number of days a client is on your BNL = the number of days they suffer in homelessness

Urgency isn't a numbers game; it means transforming people's lives

Setting Expectations



Use team strengthening time in your agenda to create proper urgency:

- **Share the “why”**
- **Invest in creating meeting objectives**
- **Frame why you ask for target move-in dates**

Facilitation Strategies

**Target Move-in
or milestone
Dates**

*Use motivating rather than
restrictive language*

**Break down
action steps**

*If the timeline feels too long
or ambiguous, break down
what needs to happen*

**Celebrate when
they're met!**

Create exciting moments

Facilitation Strategies



**Target Move-in
or milestone
Dates**

*Use motivating rather than
restrictive language*

Your #1 tool because:

- They help your team have a date for the accomplishment they look forward to
- They establish a culture of urgency
- They help you challenge yourself to house those who may linger on the list

Facilitation Strategies



**Target Move-in
or milestone
Dates**

*Use motivating rather than
restrictive language*

A good facilitation question to use for them sounds like..

- What's a realistic but ambitious date we imagine this client can be housed?
- What do you imagine it would take to house this client in the next 60 days?
- If we go all in for this client, when do you anticipate they can be housed? What can the team do to support you?

Pro tip: Use your emotional intelligence muscles. The more you think a provider would hesitate in responding, the more open and motivating you can be in your questions.

Facilitation Strategies



**Target Move-in
or milestone
Dates**

*Use motivating rather than
restrictive language*

Don't

- Avoid asking the question in fear of bad reactions. You're establishing new culture that's rooted in what serves clients.
- Ask yes or no questions such as "Do you feel comfortable giving a date for this next step?". If a step has been decided on, it should happen in the near future and a date will help it happen quickly.

The secret payoff

Your team's jobs will become easier and more fulfilling as their rhythm picks up and they start seeing clients' lives change as a result

Two more skills, really fast

Clarity on What I'm Doing, When

Make sure your team knows what they've committed to doing:

- Assign a scribe
- Double-check that you have good next steps & target dates
- Make this documentation available to the team between meetings
- Give the team time during the meeting to note action steps they committed to

Time Management

Hit the balance between having quality discussions and leaving no one behind:

- Summarize talking points you hear and invite the team to move to the next client, in the interest of time
- Take good but important conversations offline

Q&A *or*

Start planning your next facilitation

Start prepping for your next meeting

Try these changes for your next meeting:

1. Integrate 2 expectation setters into your agenda or framing
2. Pick 2 facilitation strategies to have ready if needed

Resources mentioned in this session, now available in the **Tool Bank**:

- Facilitator's Guide to Transforming Team Culture
- Facilitate the Learning Loop
- Agenda Building Kit
- Target Move-In Dates Guide



Practice until you see results

In January 2021, we're starting a 3-month case conferencing improvement cohort



GIVE US YOUR EMAIL,
WE'LL SEND DETAILS
AFTER THANKSGIVING



**Thanks for attending.
Tell us how your next facilitation
goes, you master facilitator!**

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