

Built For Zero.

Case Conferencing Summit

2020

Buckets Bootcamp:

Speed Clients Through System Bottlenecks

November 17, 2020

Trainers



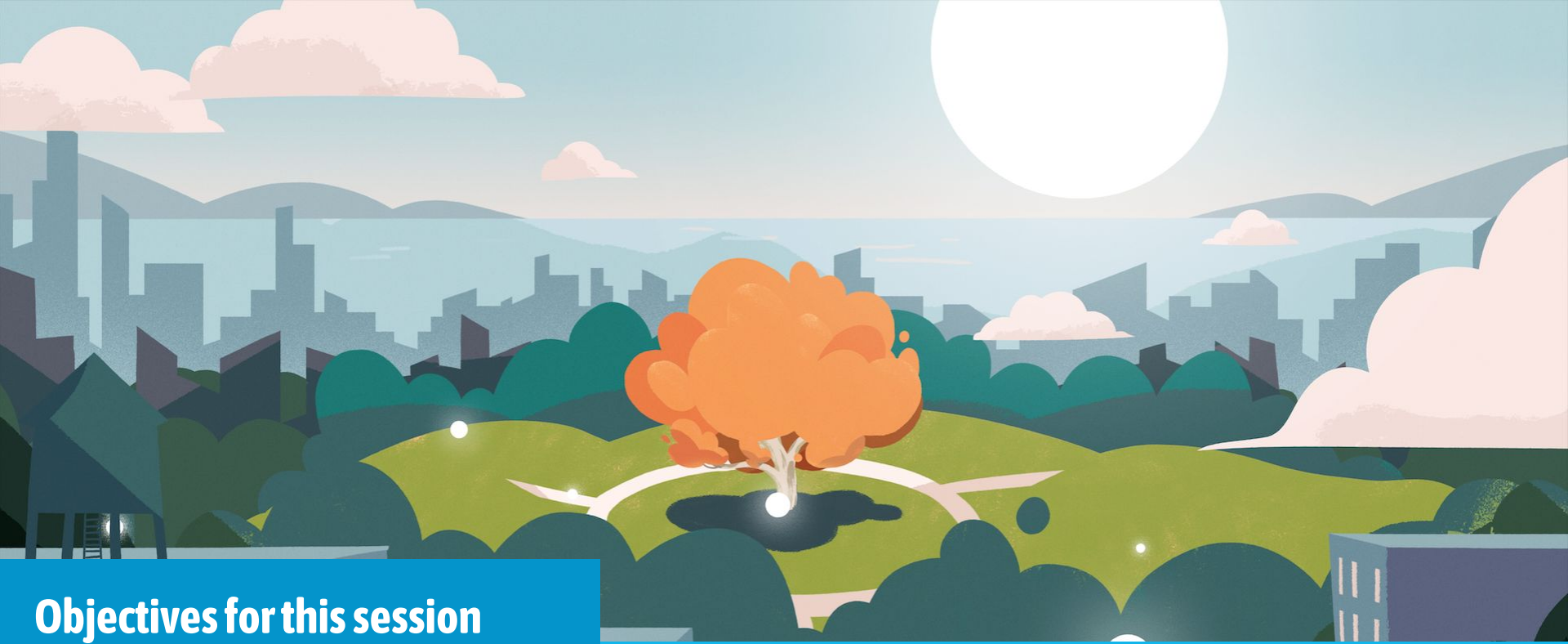
Eddie Turner

Strategy Lead
Built for Zero Collaborative



Emma Beers

Improvement Advisor
Built for Zero Collaborative



Objectives for this session

- Learn how visualizing your housing process can create new clarity on action steps
- Practice data analytics and improvement skills in your meeting

Case Conferencing Tool Bank now online



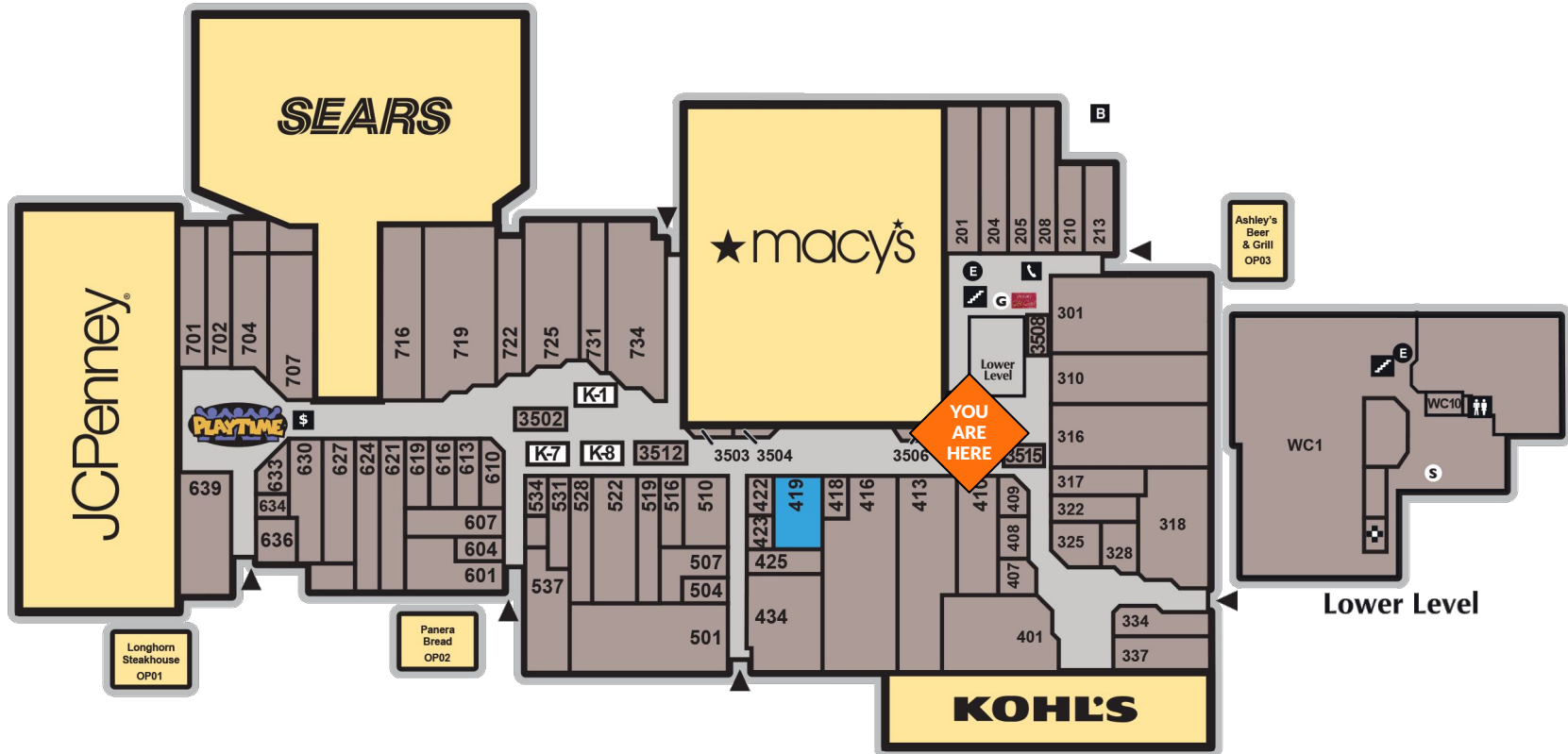
 POINT YOUR PHONE CAMERA HERE

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

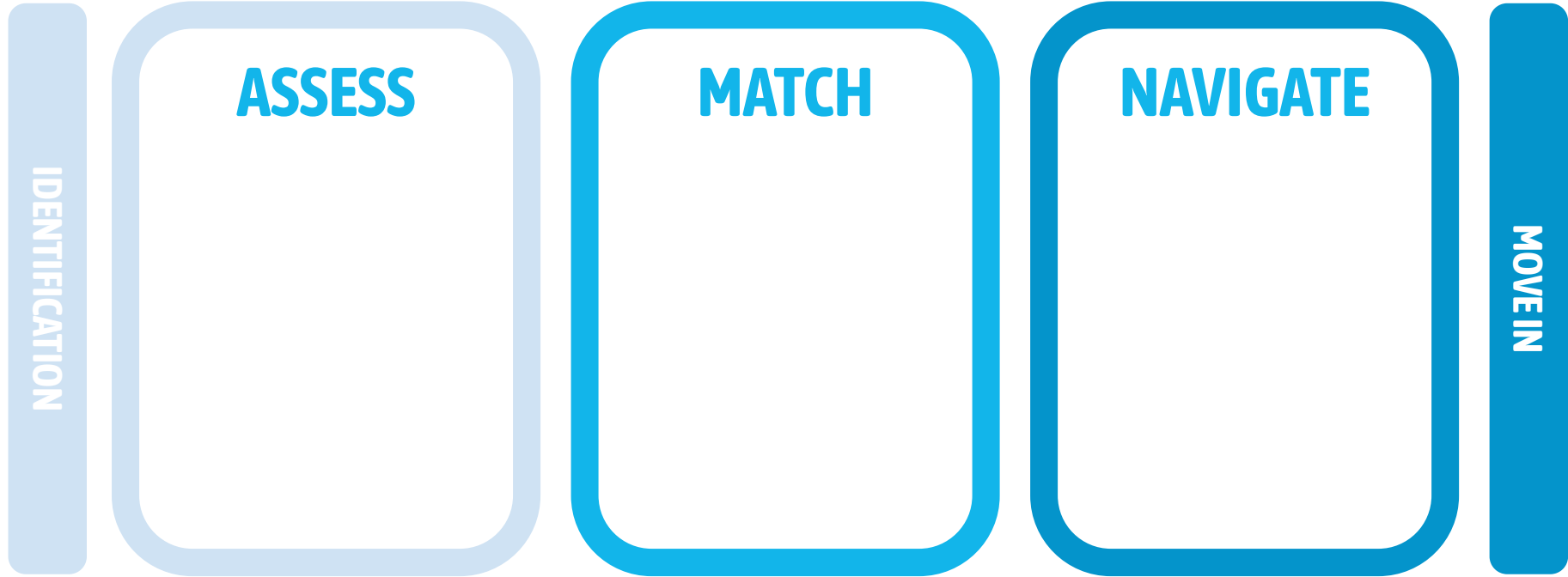
- 12 new resources to improve every aspect of your case conferencing practice
- Slides from this session—on Wednesday
- Get info about a 3-month case conferencing improvement cohort starting in January 2021

**Something powerful happens
when you visualize a process**

Consider the mall map



One way to look at coordinated entry



Add required action steps

IDENTIFICATION

ASSESS

To advance clients to the next bucket:

- ☐ Complete assessment

MATCH

To advance clients to the next bucket:

- ☐ Match to resource, program, or housing plan

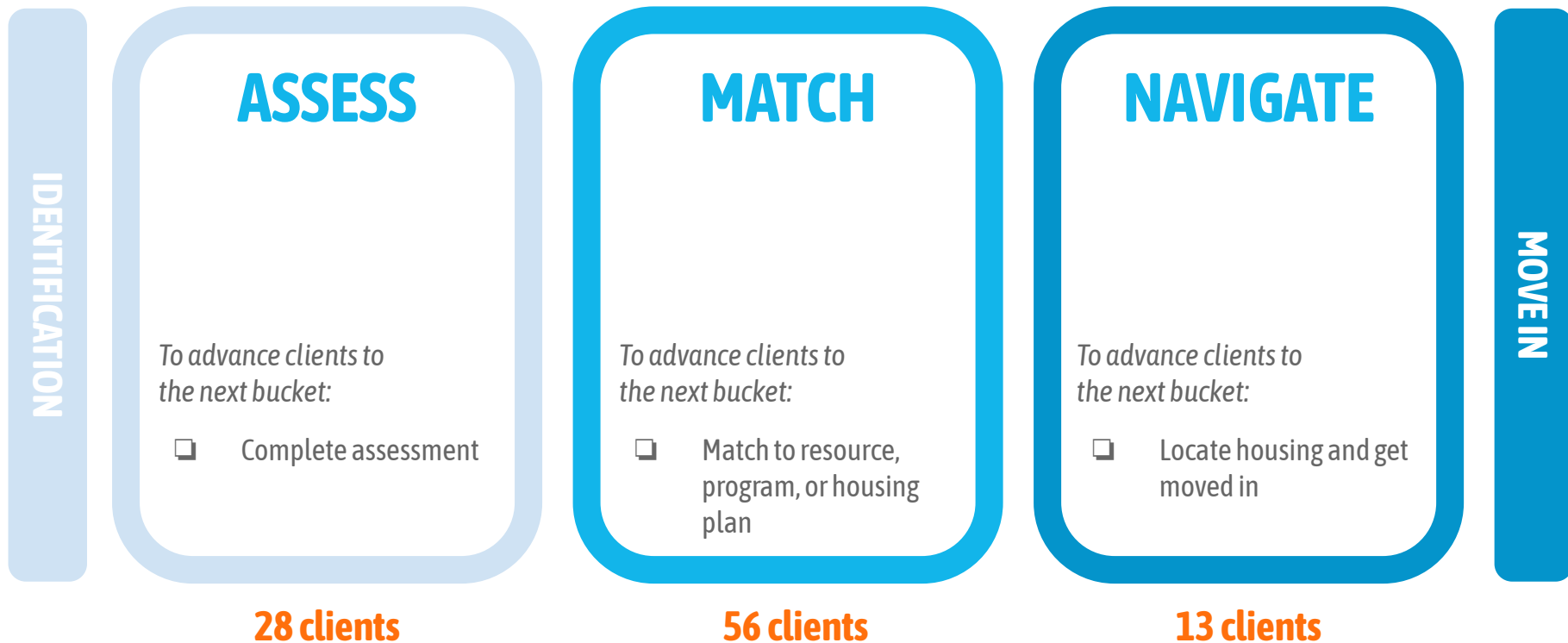
NAVIGATE

To advance clients to the next bucket:

- ☐ Locate housing and get moved in

MOVE IN

Then add client counts



Pro level: Add length of time

IDENTIFICATION

ASSESS

To advance clients to the next bucket:

- ☐ Complete assessment

28 clients

Avg. length of time:
6 days

MATCH

To advance clients to the next bucket:

- ☐ Match to resource, program, or housing plan

56 clients

Avg. length of time:
12 days

NAVIGATE

To advance clients to the next bucket:

- ☐ Locate housing and get moved in

13 clients

Avg. length of time:
9 days

MOVE IN

What buckets get you

Shape your by-name list into buckets and instantly realize two benefits:

- Reveal the next action needed to move each client forward
- If you structure your agenda and the clients you discuss around buckets, you can move forward clients from every stage of your housing process

Buckets zero in on the action

Make buckets visible in your meeting

Sort your BNL by process bucket so that it's clear in the meeting where each client sits in the housing process today and what action is required to progress them

The image shows a screenshot of a Google Sheets spreadsheet titled "Case Conferencing Tool Bank: BNL Template". The spreadsheet is used for tracking housing process buckets. The columns are organized into four main sections: Identification, Housing, Assessment, and Housing Process Buckets. The "Housing Process Buckets" section is highlighted with a yellow background and contains four columns: Process Bucket, Data Status Changed, Current Barrier, and This Week's Action Step. The "Process Bucket" column is further divided into four sub-columns: ASSESS, MATCH, NAVIGATE, and MOVE IN. These sub-columns are highlighted with a light blue background. The "ASSESS" and "MATCH" sub-columns are also highlighted with a light blue background. The "NAVIGATE" and "MOVE IN" sub-columns are highlighted with a light blue background. The "Process Bucket" column is further divided into four sub-columns: ASSESS, MATCH, NAVIGATE, and MOVE IN. These sub-columns are highlighted with a light blue background. The "ASSESS" and "MATCH" sub-columns are also highlighted with a light blue background. The "NAVIGATE" and "MOVE IN" sub-columns are highlighted with a light blue background.

Identification				Housing		Assessment		Housing Process Buckets				Learn
HMIS ID	First Name	Last Name	Last four of SS	Housing Status	Length of Time on BNL	Date BNL Status Updated	Assessment Score	Date of Last Contact	Process Bucket	Data Status Changed	Current Barrier	This Week's Action Step

Want this resource?
**Case Conferencing Tool Bank:
BNL Template**

Or use our deck to drive your meeting

MATCH

- Leonard Crane
- Veronica Beach
- Kathleen Pugh
- Safwan Joseph
- Kaine Xiong
- Lee Hazlewood
- Rachel O'Quinn

What actions will we test this week to get them matched to a program, resource, or housing plan and moved to the next bucket?

Want this resource?

Case Conferencing Tool Bank:
Buckets In-Meeting
Facilitation Slides

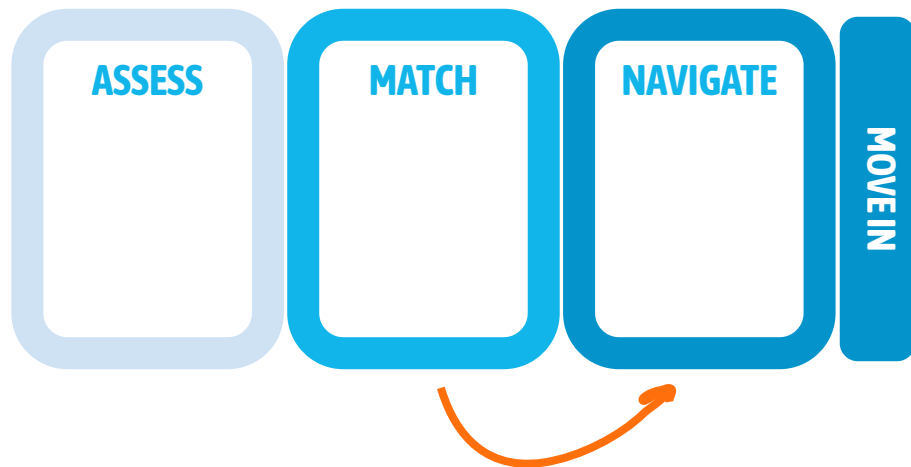
**Introduce process buckets to your team with our
template slide deck**

Just insert your client names and go

Always know the next step

In case conferencing, the most relevant information you can discuss about a client is the actions you're taking to move them to the next bucket

- Actions you tested last week
- Actions you'll test next week
- What you're learning—about your client and your system—as you go



A bucket may contain many small actions

ASSESS

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

MATCH

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

NAVIGATE

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

MOVE IN

DOWN HERE ARE
THE DECISIVE STEPS
TO MOVE FORWARD

❑ Complete assessment

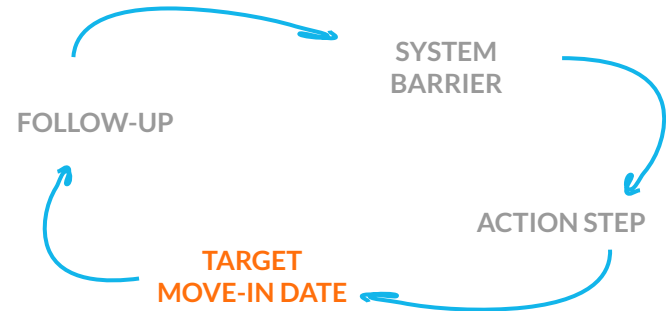
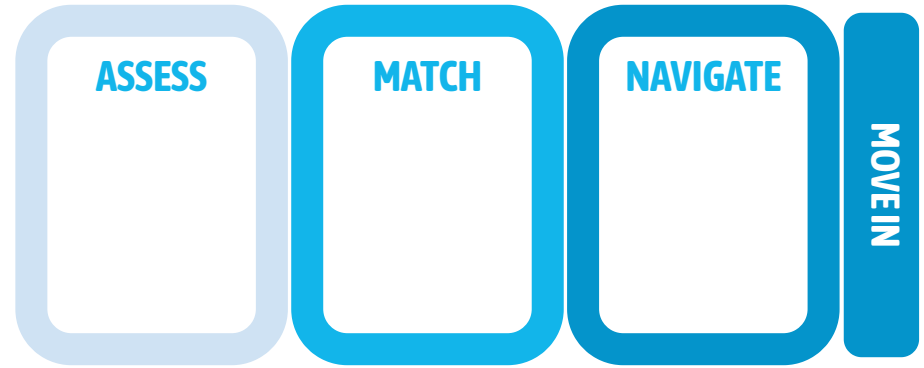
❑ Match to resource,
pgrm, or housing plan

❑ Locate housing
and move in

Set smarter target move-in dates

When you visualize clients' progress through the housing system, it gets easier to predict their target move-in date

You may estimate that a client in the **ASSESS** bucket is 45 days from move-in, while you estimate that a client in the **NAVIGATE** bucket is only 7 days from move-in



Buckets direct urgency to the right place

Urgency is appropriate: Every day a client spends waiting on the by-name list is a day they are suffering in homelessness

But staff don't need this meeting to pile on more urgency. They already feel it.

Urgency should be directed toward improving how your housing process treats people and the speed at which it moves

Buckets enable collaborative team culture

Divide the labor: Can one staff person perform a task for multiple clients? Can you root out duplication of services?

Clarify each person's role: Which buckets do they touch? Which actions are they responsible for?

Manage time in the meeting: Break up your meeting agenda by bucket. Who needs to be present for this part of the conversation?

ASSESS

MATCH

NAVIGATE

MOVE IN

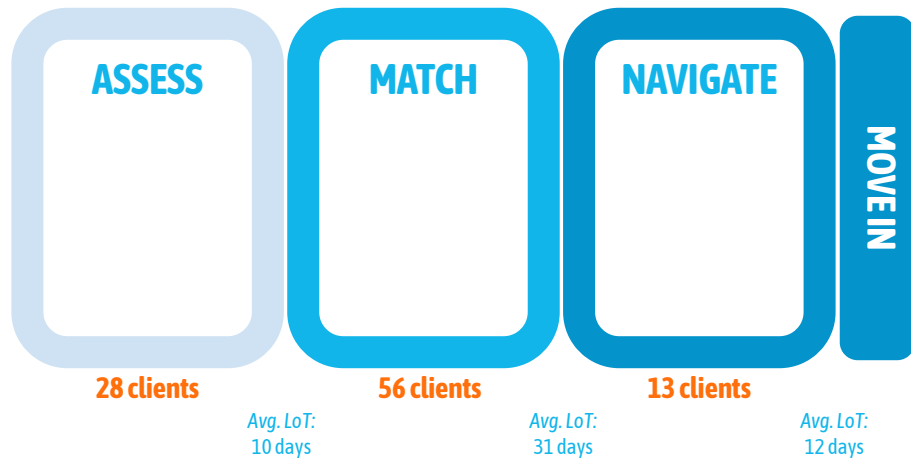
Buckets boost your system improvement brain

Bring data analysis down to the ground

Calculate two important data points:

- Number of clients per bucket
- Avg. length of time (LoT) per bucket

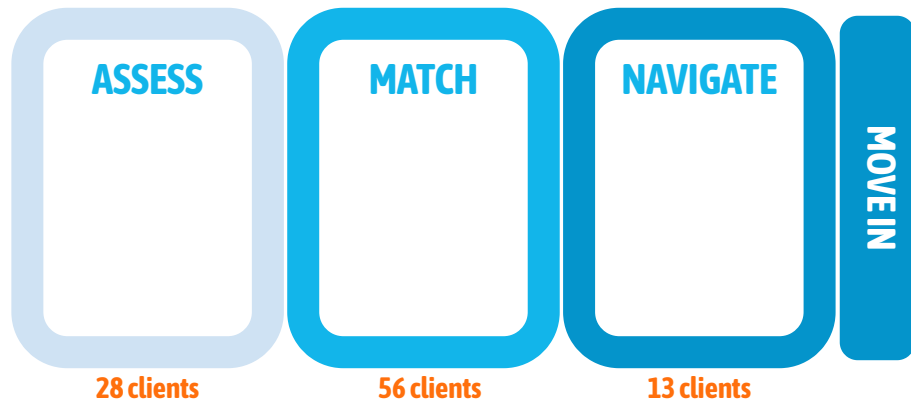
Now you have an easy way to visualize your system performance



Find system bottlenecks in your counts

Number of clients per bucket:

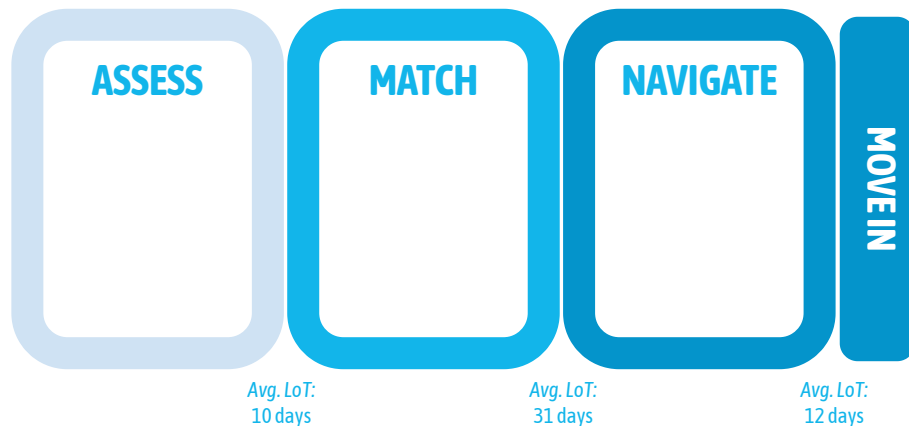
- Which bucket has the most clients? There may be a bottleneck. Assess what's causing the process problem and begin coproducing improvements.
- Which bucket has the least clients? Could be a bright spot. Learn from what's going well. (Or check if you're missing clients!)



Find system bottlenecks in LoT

Avg. length of time (LoT) per bucket:

- Which bucket is moving slowest? Map your process to understand why it's moving slowly, set a target LoT, and begin testing ideas until the time comes down.
- Which bucket is moving fastest? This part of the process is working well, so protect it and celebrate it.
- What's the average time from entering the system to being housed? If it's over 100 days, work hard to bring it under 100 ASAP. BFZ's target time is 30 days.

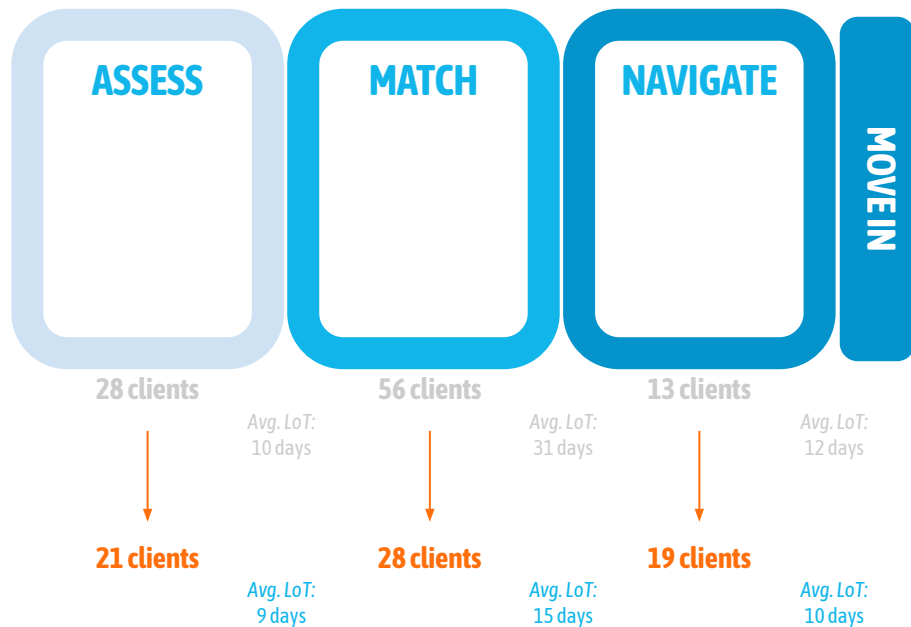


- Look for variation across individual programs or staff. Find people to celebrate and spots to improve.

Now clear those bottlenecks

Differentiate between problems you can solve *inside* case conferencing and problems for which you'll need *outside* help

- Marital your data: **"We could house clients faster if you help us solve ____, and we know it because we are seeing ____"**
- Is the problem under the control of someone in this meeting? Great! If not, look for ways to influence it
- When repeated tests don't improve the issue, it's likely time to look outside



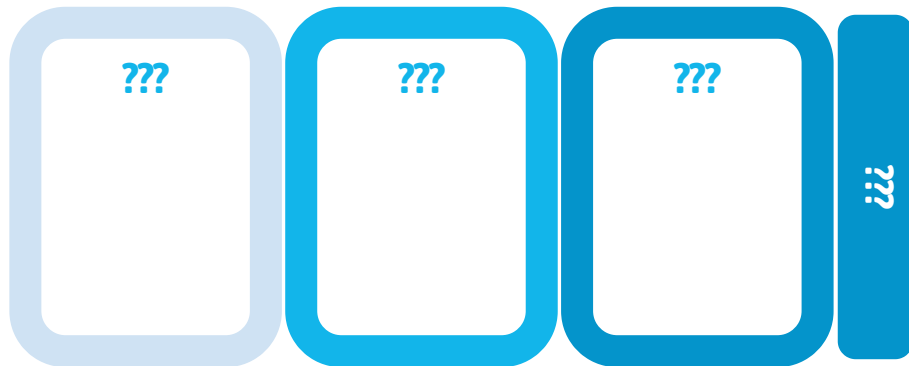
Let's set up your buckets

Customize your buckets, if needed

We mapped ours onto coordinated entry

If your case conferencing meeting is scoped for only part of the housing process, you might change your bucket labels

We recommend keeping it to 3 buckets max

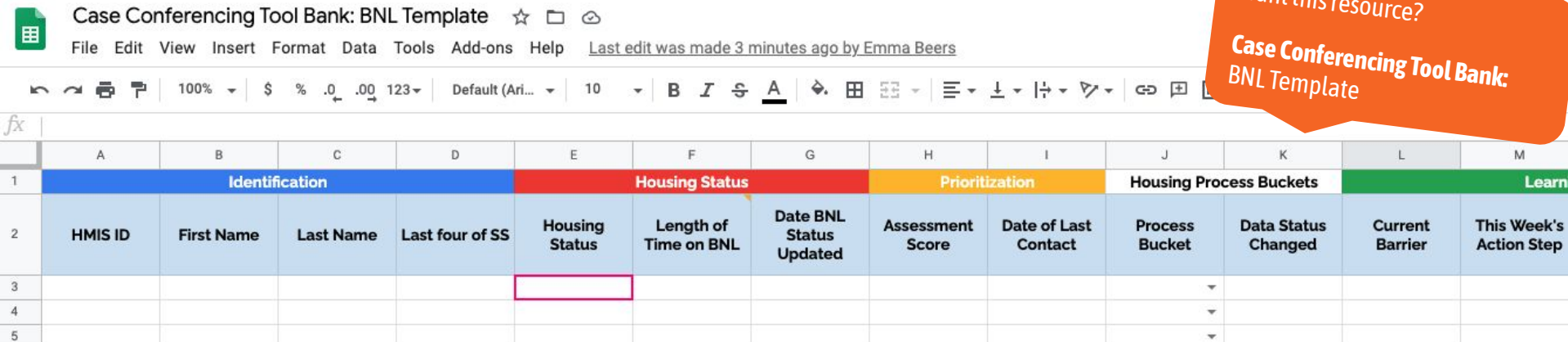


Tweak your by-name list

Add two fields to your BNL and update them at every meeting:

- Process Bucket
- Date Status Changed (Gives you avg. LoT!)

Check! You may already have fields you can use to pull process buckets



Case Conferencing Tool Bank: BNL Template

File Edit View Insert Format Data Tools Add-ons Help [Last edit was made 3 minutes ago by Emma Beers](#)

100% \$ % .0 .00 123 Default (Arial) 10 B I S A

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Identification				Housing Status			Prioritization		Housing Process Buckets		Learn	
2	HMIS ID	First Name	Last Name	Last four of SS	Housing Status	Length of Time on BNL	Date BNL Status Updated	Assessment Score	Date of Last Contact	Process Bucket	Data Status Changed	Current Barrier	This Week's Action Step
3													
4													
5													

Want this resource?
**Case Conferencing Tool Bank:
BNL Template**

Make it the new way you work

Introduce the concept to your team to help them understand its value to clients and staff

Brainstorm change ideas as a team to develop shared notions of how to move clients forward to the next bucket

Track as a team your length of time and build competitive spirit to beat your own times

Q&A *or*

Start building your buckets now

Start building your buckets

Try these changes at your next meeting:

1. Add BNL fields from our template, or check if “bucket” fields already exist
2. Break up your agenda by process bucket, or use our in-meeting buckets deck
3. Ask staff to name the action step that moves a client to the next bucket

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

- Buckets In-Meeting Facilitation Slides
- BNL Template



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 the buckets
transform your practice!**

Emma — ebeers@community.solutions

Eddie — eturner@community.solutions