

# Welcome!

Mute your  
audio!

Turn on  
your video!

Say hi in the chat box! Tell us:

**Share your aspiration! How do you want  
to introduce yourself in 10 years from  
now?**

**Built For Zero.**

# Case Conferencing Summit

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# 2020

## Facilitate for Housing

## Placements:

## Break the Updates Meeting

November 16, 2020

## Session Facilitators

**Anna Bialik**

Improvement Advisor  
Built for Zero Collaborative



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Strategy Lead  
Built for Zero Collaborative



# Agenda

Topic	Objectives	Time
Hello! Welcome! Agenda!	To get to know the presenters and each other. Overview of the objectives of our time together today.	10 minutes
What is <u>not</u> Case Conferencing?	<b>Clarify the scope of your case conferencing meeting. How do we keep this work focused on the thing that ends homelessness: housing.</b>	5 minutes
Design Principles & Setting the Agenda	Model a sample agenda that focuses on generating creative solutions to house clients and developing a supportive team culture	5 minutes
The Learning Loop	Orient to the foundational questions to ask about each client; Learn to ask questions that focus participants on taking action to house clients	10 minutes
Target Move-In Date	How to use Target Move-In Dates to increase housing placements	10 minutes
Transforming Team Culture	Learn to develop a team culture that prizes learning and collaboration	10 minutes
First Steps, Next Steps, Q&A & Resources	<b>First or next steps to changing your case conferencing practices; Orientation to additional resources</b>	10 minutes

# Case Conferencing Tool Bank now online



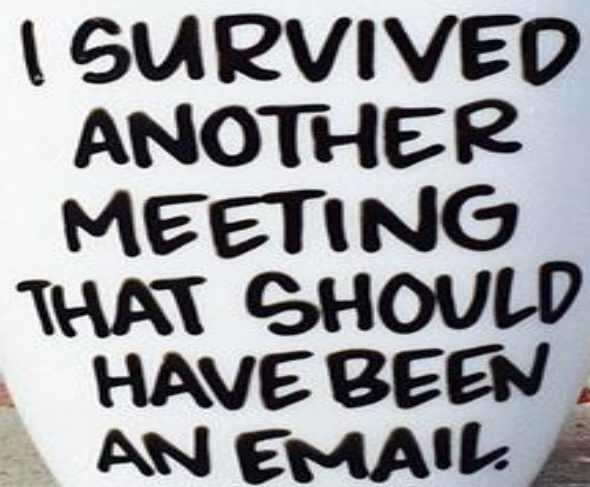
 POINT YOUR PHONE CAMERA HERE

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

What is not Case Conferencing?





**I SURVIVED  
ANOTHER  
MEETING  
THAT SHOULD  
HAVE BEEN  
AN EMAIL.**

# What is Case Conferencing?



**Case conferencing is an opportunity to transform how your team thinks and acts.**

*How do we get there?*

# Design Principles

## Invest in Team Building

- Do you CC Teammates feel seen and heard?

## Keep the Goal Front and Center

- Housing placements end homelessness
- Break down large goals into more immediate milestones

## Prioritize Action

- What are the next steps to housing placement?
- Target Move-In Dates
- More to come!

## Stay Flexible

- Learn about what's working across the movement
- Plan ->Do ->Study ->Act

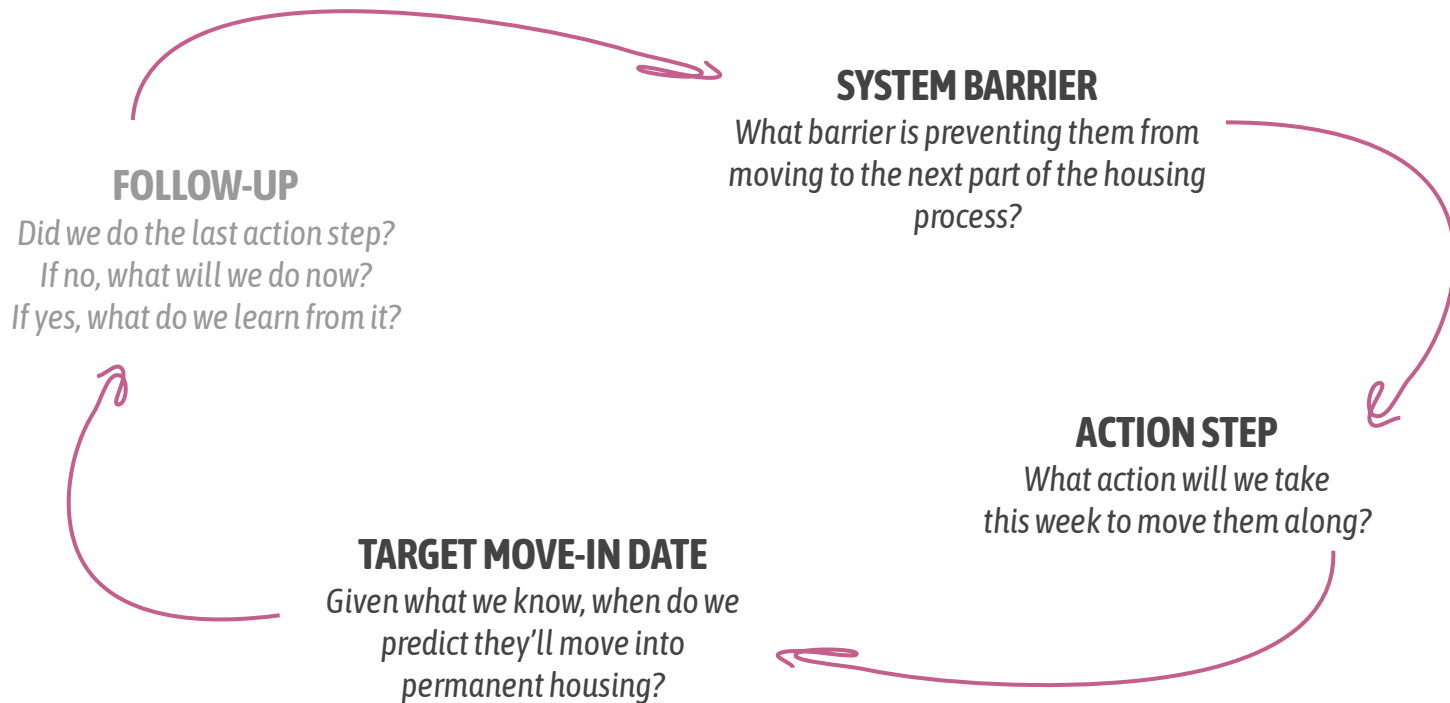
3 Days before meeting	2-3 Days before meeting	1 Day before meeting	Have an amazing Case Conferencing Meeting!!!
<i>Determine who you will be discussing during the meeting and align the selection with your community goals.</i>	<i>Share the BNL with your Case Conferencing team</i>	<i>Draft your agenda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

# Sample Case Conferencing Agenda

Sample 70 minute meeting

Topic	Guidance	Time
<b>Introduction &amp; Team Strengthening</b>	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
<b>Goal Statement and Meeting Framing</b>	<b>Share your long-term system goal (Reduction, FZ, QBNL) and the milestone goal for this month</b>	2 minutes
<b>Data Share-Out and Celebrating Wins</b>	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
<b>Generate Client Housing Plans</b>	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
<b>Announcements</b>	General updates on programs, vacancies, etc. go here.	5 minutes
<b>Lock in Action Steps</b>	Reiterate when will the action steps happen. Invite team members to document action steps on their to-do lists or calendars.	3 minutes

# Use the Learning Loop for every client



# Common system barriers

Find the problem in your housing system, not your client

Think of it as a “stuck point”:

- Needs engagement
- Needs assessment
- Needs documentation or verification
- Needs program enrollment
- Needs subsidy
- Needs unit
- Needs move-in funds

# Use the Loop to point to new actions

- “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?”



# Introduce 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

# Target move-in dates are for learning

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

# Transforming Team Culture

Generate Actionable Solutions for Clients

Move from “My Client” to “Our Client”

House with Urgency

Clarity on What I’m Doing, When

Manage Time to Leave No One Behind

# Generate Actionable Solutions for Clients

## Solving for Problem-Fixated Narratives:

- **Signs to Watch for:** oversharing client barriers unrelated to housing, All/Nothing Language, scarcity mindset
- **Set Expectations for the Meeting:** encourage providers to look for barrier within the housing system, rather than within the client, create a contrast with unproductive meetings
- **Strategies to Facilitate for Problem Solving:** Validate frustration and offer support, narrow big barriers into just the actions that could take place this week (Shrink the Change), use target move-in dates, use the Strengthening the Team time on the agenda to establish team norms on acceptable ways to speak about clients..

# Moving from “My Client” to “Our Client”

## Solving for Provider Silos:

- **Signs to Watch for:** Provider may give you a brief or fuzzy answer, Provider appears irritated or uncomfortable
- **Set Expectations for the Meeting:** Opportunity for mutual support, frame your role as a support catalyst (not an authority), this meeting is designed to capitalize on everyone’s superpowers!



# Moving from “My Client” to “Our Client”

## Strategies to Facilitate for Problem Solving:

- Ask clarifying and opening questions,
- Develop strong inventory of what each person can offer/each person's capacity,
- Engage directly if there are silent partners at the table - some providers may be struggling to find their place or purpose in the meeting..

# Housing with Urgency

## Solving for Problem-Fixated Narratives:

- **Signs to Watch for:** when asked about next steps, long timelines are offered, resistance to offering timelines at all, resistance to providing target housing/milestone dates.
- **Set Expectations for the Meeting:** explicitly state that the meeting is a place to brainstorm how to house clients faster, tie individual achievements to the larger system goals, Explain that target housing dates and other “by when” dates are intended to help learn what works and improve the system.
- **Strategies to Facilitate for Urgency:** break long timelines into smaller action steps and how long each step will take, offer direct support to speed up timelines, use target move-in/milestone dates, share length of time data, and celebrate success!



# Clarity on what I am doing, When

## Solving for Problem-Fixated Narratives:

- **Signs to Watch for:** Poor documentation, low quality next steps, participants showing up unprepared because they were not clear on their responsibilities or due dates.
- **Set Expectations for the Meeting:** Name the purpose of the meeting, prime the team for a mindset change, let them know in advance that they will be asked for target move-in/milestone dates
- **Strategies to Facilitate for Clarity:** assign a scribe, make sure to ask for and document next steps and target housing/milestone date. Clarify and document who will do what and by when, allow time for attendees to calendar next steps, share out the meeting notes!

# Managing Time to Leave No One Behind

## Solving for Time Challenges:

- **Signs to Watch for:** skipping over parts of the agenda, gaps in documentation, low quality next steps, meetings going over time/attendees losing interest.
- **Set Expectations for the Meeting:** Frame the meeting for client problem solving with boundaries around time that leave the clients as the priority, share expectation that there will be 2-3 minutes to discuss each client.
- **Strategies to Facilitate for Problem Solving:** Collect all updates before the meeting, if a conversation is eating away time, summarize the important points and move to the next item, utilize your timekeeper!

**Q&A** *or*

**Start preparing your next facilitation**

# Start preparing your next facilitation

Try these changes for your next meeting:

1. Use the Learning Loop questions for each client you discuss in order to generate clear, recorded action steps
2. Fine-tune your agenda to build the team culture

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

- 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

The background features a stylized sun with a large orange circle in the center and several thin yellow lines radiating outwards. The sun is set against a light blue sky. On the left and right sides, there are soft, white, cloud-like shapes. The overall color palette is pastel and bright.

**Thanks for attending.  
Tell us how your next  
facilitation goes!**

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