

**Built For Zero.**

# Case Conferencing Summit

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# 2020

## Measure for Results:

## How to Know the Meeting

## Is Working

November 17, 2020

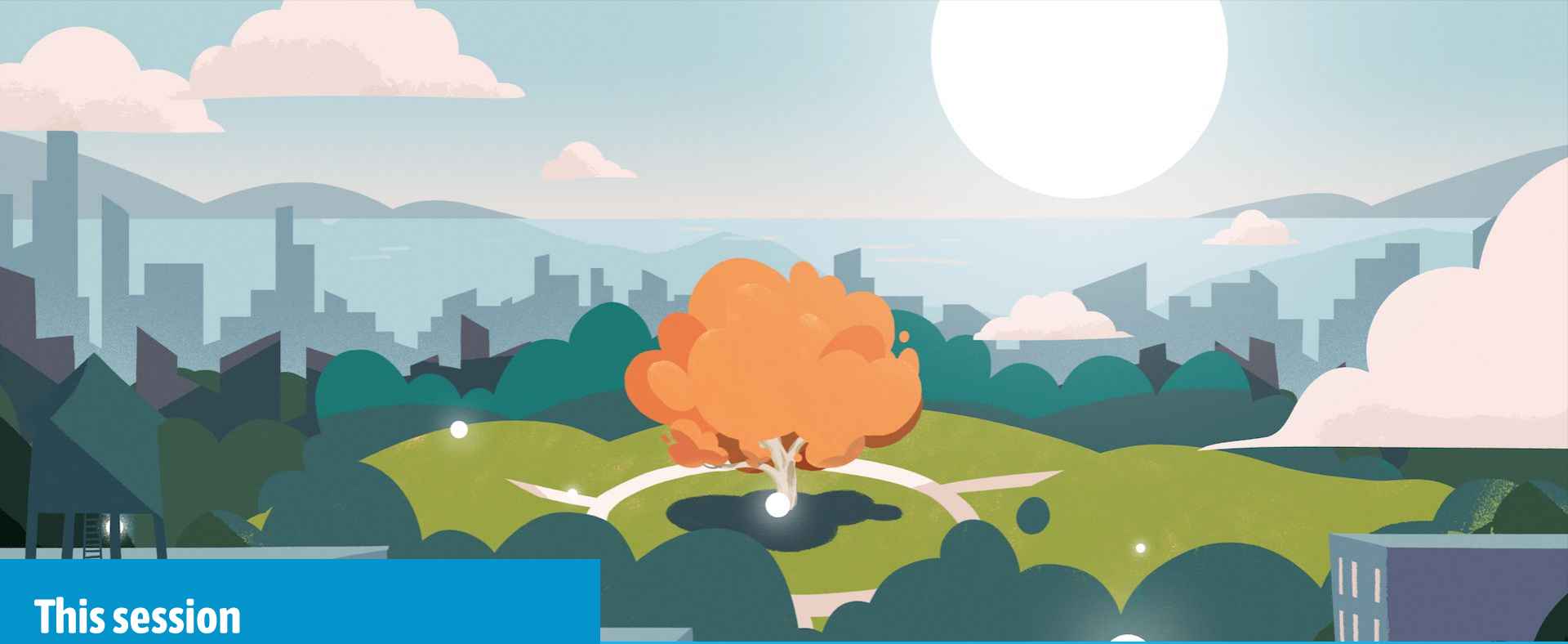
# Your trainer for this session



**Eddie Turner**

Strategy Lead

Built for Zero Collaborative



## This session

- Judge if your meeting is fruitful by tallying up how many actions are teed up
- Validate if case conferencing is improving your system speed by tracking the right system outcome measures

# 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
- Save your place in a 3-month case conferencing improvement cohort starting in January 2021

**What if case conferencing  
is high stakes?**

# What's the cost of your meeting?

For your coalition:

$$\begin{aligned} & \text{\# of attendees} \times \text{\# of meetings per year} \times \text{\# of hours per meeting} \times \text{each attendee's hourly wage} \\ & = \$ \text{your meeting cost} \end{aligned}$$

For people experiencing homelessness:

$$\begin{aligned} & \text{Inefficient processes} \times \text{staff confusion} \times \text{muddled communication} \times \text{update-centric facilitation} \\ & = \text{slower path to housing} + \text{longer time spent homeless} \end{aligned}$$

# What's the potential energy?

Proven benefits to communities who make case conferencing action-oriented:

- House clients faster
- Experience themselves as a team, even across organizations and agencies
- Hustle to meet high-level goals, like functional zero
- See their by-name lists reduce
- Beat collective action problems
  - Less “That’s not my job”
  - Less “We can’t accomplish that”

# How to unlock energy and cost savings

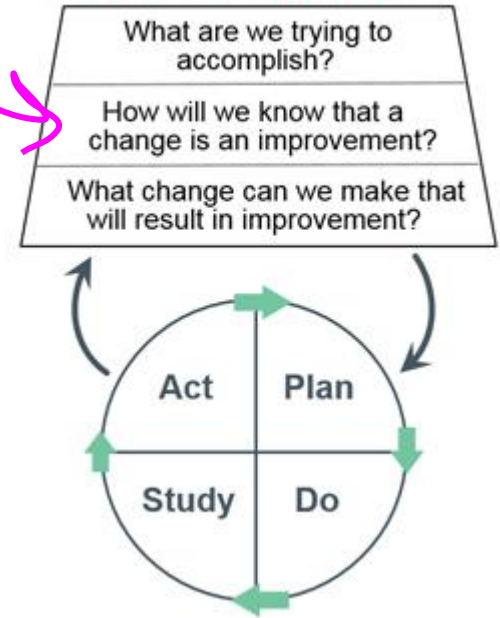
It's really simple: Begin measuring your case conferencing practice



# Measurement is essential

Quality Improvement teaches us that measurement is the only way to know if a change is an improvement: Measure it

## Model for Improvement



# Two types of measures

**Process measures** regard incremental steps. They ensure that a process is being executed as planned.

**Outcome measures** regard your aim. They ensure that your process is contributing to your ultimate purpose for this work, in this case, ending homelessness.

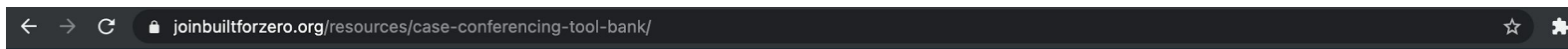
**THE BIG PROCESS MEASURE QUESTION:**

**Did the meeting produce actions?**

# Have you defined meeting objectives?

We help you set meeting objectives in two places:

- **Set Objectives for Your Meeting** guide in the Case Conferencing Tool Bank
- **Start Clean** Summit session



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COMMUNITY SOLUTIONS

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MY COMMUNITY



## Align Participants in Shared Purpose

### Set Objectives for Your Meeting

[Download](#) | [View](#) on Google Drive

Your meeting's main objective should be to move clients faster through the housing process.

# Start with your meeting objectives

If your meeting's main objective is to house people faster...

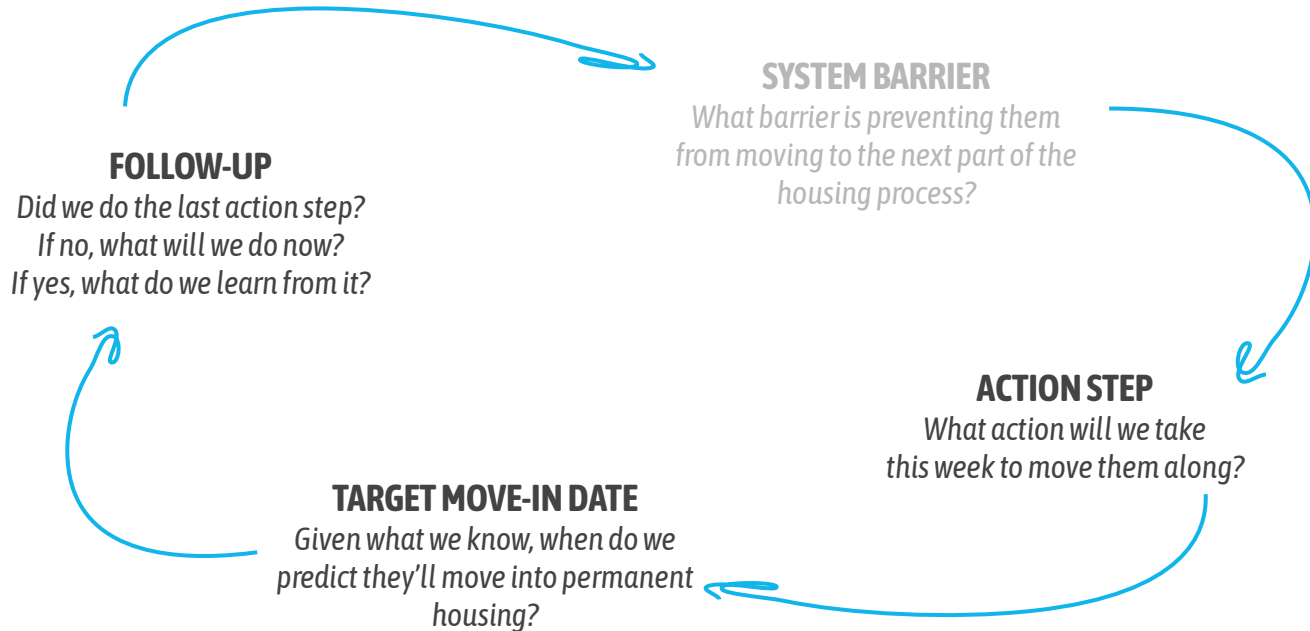
Then your process measures will focus on actions you take to house people faster

BFZ believes this should  
be your meeting's main  
objective!

# Count key actions

Want this resource?  
**Case Conferencing Tool Bank:**  
Facilitate the Learning Loop

Easy shortcut for counting actions: Use the Learning Loop steps!



# A must-have: Record your data

Want this resource?  
**Case Conferencing Tool Bank:**  
Tally Sheet

We created the **Case Conferencing Tally Sheet** to give you an e-z place to record your Learning Loop steps—a.k.a. your process measures

Recording data enables you to learn from it. Otherwise it's just evaporating numbers.

## Case Conferencing Tally Sheet

	Meeting 1 date:	Meeting 2 date:	Meeting 3 date:	Meeting 4 date:
How many clients were discussed?				
Of the clients discussed, for what percentage is there an action step, with due date?	%	%	%	%
Of the clients discussed, for how many is there now a target move-in date within the next 30 days?				

# Using the Tally Sheet

	Meeting 1 date:	Meeting 2 date:	Meeting 3 date:	Meeting 4 date:
How many clients were discussed?				
Of the clients discussed, for what percentage is there an action step, with due date?	%	%	%	%
Of the clients discussed, for how many is there now a target move-in date within the next 2 months? <i>This number predicts your housing placement rate. Does it sync up with your goals?</i>				
How many action steps were completed after the last meeting?	%	%	%	%
What changes did we try today?				
Next time, what changes should we try to raise the above numbers?				



# Tally Sheet tips

- **When to fill it out?** At the end of your meeting; keep it simple 'n quick.
- **Who fills it out?** Maybe the notetaker and facilitator together. Or, if you're leading your team to think about improvement, complete it out loud as a team to spark reflective conversation.
- **Make the process measures public:** Encourage shared ownership of the meeting by sharing these stats. Ask: What are these measures helping us learn about the meeting? What's one thing we can do to improve them?
- **Make it a forecasting device:** The target move-in dates field says "2 months." As your team houses people faster, change it to 30 days. Now it provides a forecast of how many people you expect to house in the next month!

# Tally Sheet in action

K Keanna Johnson is presenting

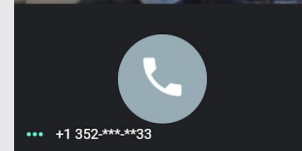
Brenda Chamberlain & Keanna Johnson

Gainesville, FL — North Central Florida CoC

	Meeting 1 date: 10/19/2020	Meeting 2 date: 11/02/2020	Meeting 3 date:	Meeting 4 date:
How many clients <u>were discussed</u> ?	15	12		
Of the clients discussed, for what percentage is there an action step, with due date?	100 %	92 %	%	%
Of the clients discussed, for how many is there now a target move-in date within the next 2 <u>months</u> ? <i>This number predicts your housing placement rate. Is it reflecting your goals?</i>	NONE	2		
How many action steps <u>were completed</u> after the last meeting?	NA %	60 %	%	%
What changes did we make to today's meeting?	NA	Went over the list separately with the HUD-VASH team to discuss Veterans with vouchers on list in EH		
Next time, what changes should we try to raise the above numbers?	NA	Set more move in dates, send reminders out about next steps due so everyone is more prepared with their updates		



10:19 AM



# One more measure: Qualitative feedback

Is the meeting accomplishing its experiential objectives—cohering your coalition, fostering collaboration, and making everybody's jobs easier?

## The best way to know is to talk to people

- **Do 1:1s:** Ask attendees how they are benefitting from the meeting, ask how their clients are benefitting from the meeting
- **Get curious about people** who don't speak or stopped coming to the meeting
- **Get curious about people** who interrupt or take the conversation off course

**THE BIG OUTCOME MEASURE QUESTION:**

**Does case conferencing help us  
house people faster?**

# You case conference for a reason

Your ultimate goal is to house more people and house them faster

*Every minute they spend on your by-name list is a minute  
they spend suffering in homelessness*

Housing more people faster will lead you to functional zero

But how will you know if case conferencing is advancing you toward that goal?

# Housing placement rate is OK...

Action-oriented case conferencing will likely increase your monthly housing placement rate

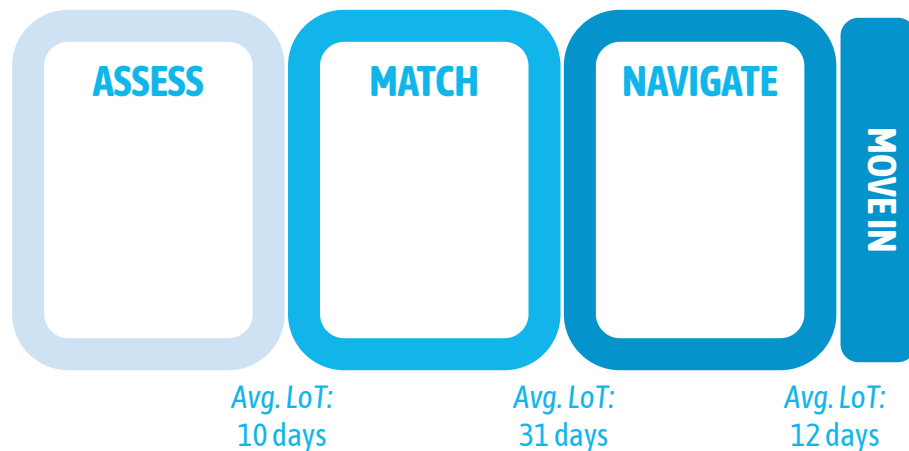
It's not an ideal outcome measure, because *many factors* can affect your housing placement rate!

# Length of time is

The best outcome measure is **length of time**

Measure the entire process, from identification → housing

or measure segments of the process, such as assessment → match



# Your target length of time

Ideally, your avg. length of time—from identifying a client to housing them—is 30 days

If that ideal number is lower than your current average, don't freak out!

Use a chain of small goals to move it down, down, down

Resources in the Case Conferencing Tool Bank are proven to reduce length of time

Begin testing changes, and you should see the number go down

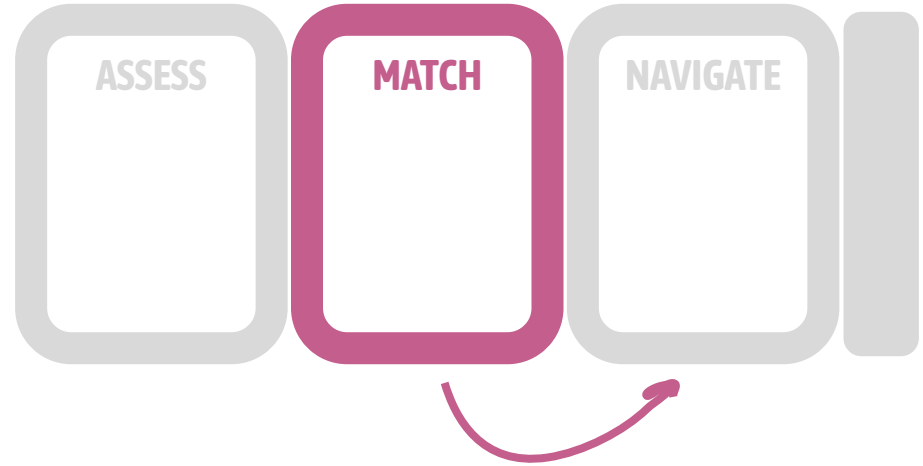


# Take action to decrease it

**Once you zero in on a process segment that's too slow, start improving**

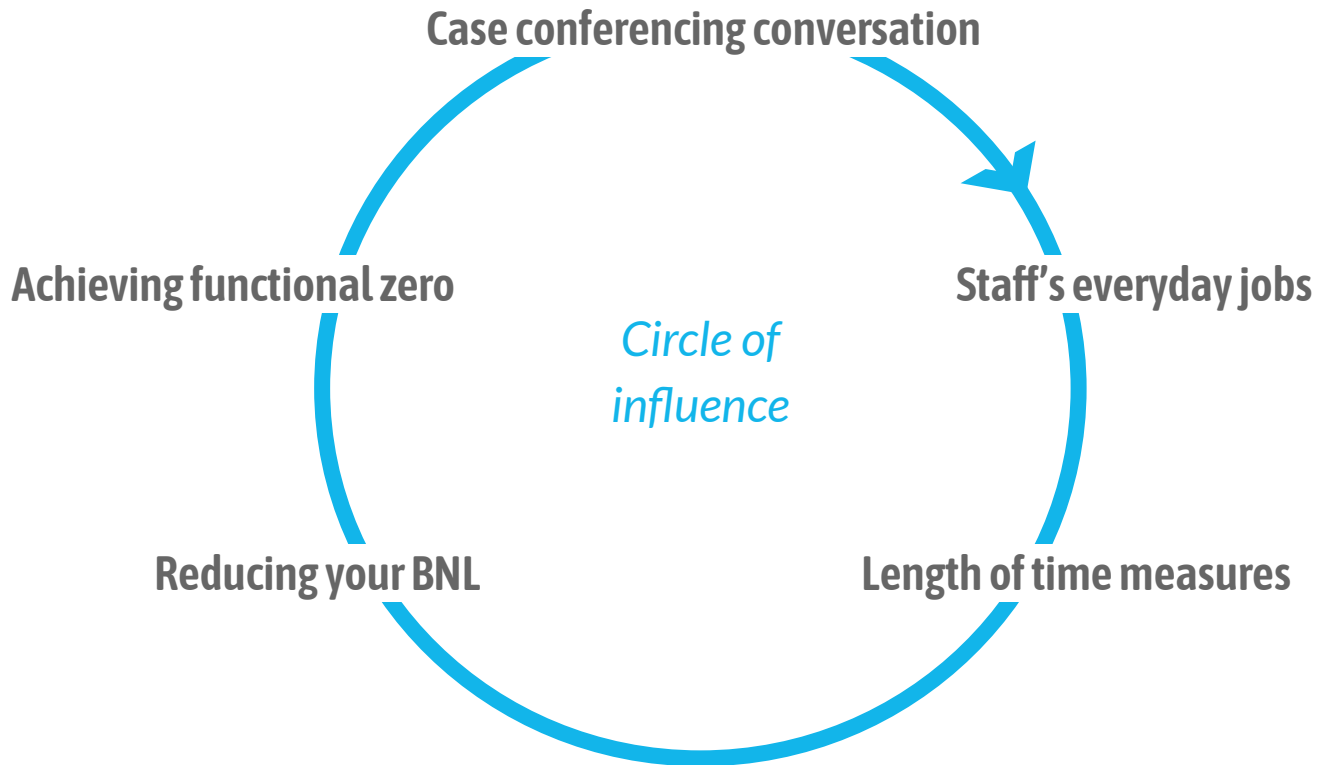
In your meeting, brainstorm new actions you'll try this week with clients currently in that segment of the process

Try to set sooner target move-in dates



Case conferencing conversation → Staff's everyday jobs → System-level length of time measures →  
Reducing your BNL → Achieving functional zero

# Help each staff member trace the path



# What if your LoT numbers don't go down?

- **Shrink the change!** Calculate LoT for segments of the process, rather than the whole thing, to zero in on where you are bottlenecked
- **Ask for advice and feedback from frontline staff:** They don't just see process bottlenecks; they feel them
- **Discuss with your coach** implementing changes with fidelity to the model
  - Did you set clear objectives and get everybody on board with them?
  - Are you facilitating the Learning Loop for every client in every meeting?
  - Are you collecting data on process measures?

**Q&A** *or*

**Start your measurement plan**

# Start measuring at your next meeting

Try these changes at your next meeting:

1. Make a copy of the Tally Sheet and fill it out after your next 4 meetings
2. Ask your Data Lead to compute LoT data, identify the slowest segment in your housing process, and focus on clients stuck in that bucket

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

- Case Conferencing Tally Sheet
- Facilitate the Learning Loop
- Set Objectives for Your Meeting



# 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 what you measure!**

Email Eddie — [eturner@community.solutions](mailto:eturner@community.solutions)