

Built For Zero.

Case Conferencing Summit

2020

Pick Clients, Hit Goals, and Leave No One Behind

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Your trainer for this session



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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

The background is a stylized illustration. At the top, a light blue sky contains a bright orange sun with radiating lines, partially obscured by soft, white and pinkish clouds. Below the sky, a city skyline is visible, featuring various geometric shapes in shades of blue, grey, and white, representing buildings and structures. The overall style is modern and graphic.

Tell us in the chat:

- Your name & team
- How do you currently choose who to talk about in your meeting?

Big jobs for this session

1. Decide which clients to discuss in case conferencing
2. Connect the clients we discuss to our big community goals
3. Do all this while leaving no one behind

About this thinking

- Based on learning from BFZ communities where it's working
- Produce results in large BNLs and complex systems
- Think of it as a set of principles for you to apply
- Customize it to work for your community, your staff, and your priorities

Pick clients to discuss in the meeting

Six principles to guide your conversation

1. Break up by population
2. Work with a pre-selected list
3. Allocate 2-3 minutes for each client
4. Shrink the change
5. Align with community goals
6. Stay consistent but flexible

1. Break up by population

If you run a multi-population meeting, consider splitting up the attendance or the time allotted by population

2. Work with a pre-selected list

3. Allocate 2-3 minutes for each client

Use a timekeeper, and stick to a tight schedule

Aim to discuss around 30 clients per meeting

Additional clients may be discussed in other meetings or breakouts of this meeting

Balance quality and efficiency; your goal is to solve problems for each client while leaving no one behind

4. Shrink the change—break it down

Split up your BNL into multiple **meetings** or **breakouts** of a single meeting

Sample buckets:

ASSESS

Complete a standard assessment and coordinate outreach

MATCH

Problem-solve around preparing for housing, incl. subsidies, maximizing income, and wrap-around services

NAVIGATE

Use the group's creativity and experience to find units and clear barriers to move-in

4. Shrink the change—by isolating a group

Isolate a subset of your by-name list, perhaps for a month or a quarter

Sample options:

- Long stayers
- Individuals at higher risk for COVID-19
- Clients with high vulnerability scores
- Clients you can challenge yourselves to house this month

4. Shrink the change—mix ‘n match

Break down your BNL *and* isolate groups to get actionable client lists

Break down a 300-person list into
3 meetings,

Then focus on the most
vulnerable

Discuss each geographic area,

Then, within those areas, discuss
clients with high COVID
vulnerability

Focus on long stayers for half the
meeting,

Then focus on a different set of
clients in the second half

5. Align with community goals

Sample goals and client picks to achieve the goals:



Goal: Reduce unhoused clients at risk of COVID from 120 to 80

How to pick clients: Focus on high COVID risk status

Goal: Reduce avg. length of time from identification to move-in from 60 to 30 days

How to pick clients: Split up by housing stage and set goal at each meeting

Goal: Reduce from 100 to 50 homeless veterans in 4 months

How to pick clients: Prioritize by who can we challenge ourselves to house in the next 30 days

6. Stay consistent but flexible

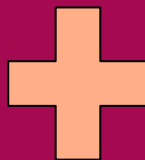
Whatever structure you land on, keep a testing and learning mindset front and center. You may choose to prioritize based on certain criteria for a quarter, but that doesn't mean forever. Consistently measure your practice and adapt based on what you're seeing.

Signs of a structure working for you are seeing movement on stagnant clients, your team feeling more focused, and increases in your housing placement rates.

Apply this self-test as you go

Capacity

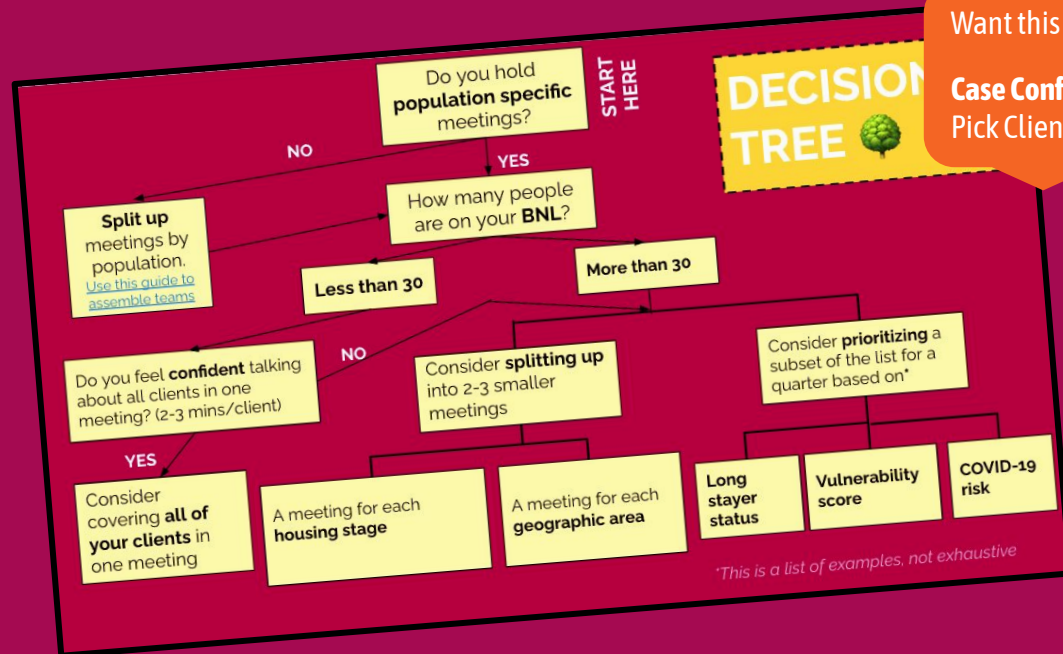
*What your team can
handle right now?
Work up to what's ideal*



Equity

*This is not about cherry
picking, it's about to
challenge ourselves to
house those who aren't
housed yet*

Try the decision tree



Want this resource?

Case Conferencing Tool Bank:
Pick Clients to Discuss

The background is a stylized illustration. It features a light blue sky with soft, white and pinkish clouds. A small orange sun with radiating lines is positioned behind a cloud in the upper center. In the bottom right corner, there is a stylized city skyline with various buildings in shades of blue and grey. The overall aesthetic is clean and modern.

What resonated with you here?

Or

What questions are coming up?

Let's talk to Tucson

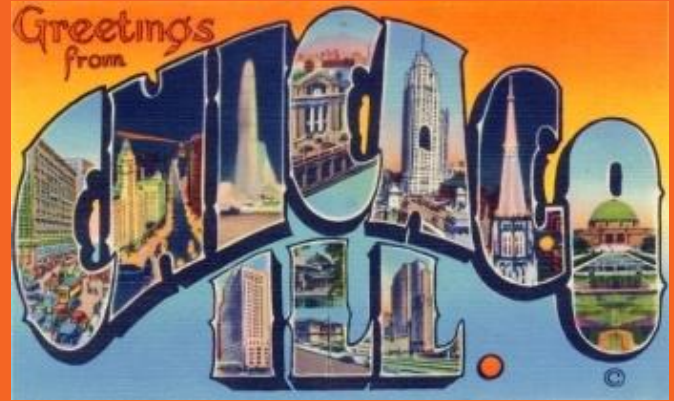


Tucson structured around a goal

Key facts:

- Focused on chronic vets - 46 at start
- Success: Saw a big reduction, down to 15 chronic vets!!
- Led to big reductions in their entire veteran BNL, too

Let's talk to Cook Co.



**Built
For
Zero.**

Cook Co. structured around magic math

Did the math and focused on who they can challenge themselves to house in the next 30 days

The magic number to beat inflow was 18 exits per month

They made sure to have 18 target move-in dates every month

Success: Reduced from 59 to 27 vets!!!

Wait—

**How did they come up with that magic
number of 18?**

Introducing the

Target Move-In Dates Calculator

What the calculator gives you

- Check if your team's target move-in dates are on pace with goals
- Contextualize your housing placement rate
- Connect high-level goals to actions that staff can take this week

As you practice, your number of target move-in dates for the next 30 days will begin to match your housing placement rate

What the calculator gives you



Esther Tang
Data Solutions Manager
AKA Data Magician

30 Day Target Move-In Calculator

Setting a Target Move-In Date Goal can bring new focus and clarity to the way that you work with clients every week.

At the end of your case conferencing meeting, consistently check how many target move-in dates your team has set for the next 30 days.

Are you on track to house enough people to reduce your actively homeless number? This goal calculator will help you know.

HOW TO USE THIS TOOL

It takes a lot of work to reduce your actively homeless number. This tool helps you focus on just one part, your housing placements. Use the **Target Move-In Dates Guide** along with this tool to ensure that your team is on track to house people at your desired rate.

This tool helps your case conferencing team set target move-in dates so that you can house people faster. It is not a forecasting tool. If your inflow or outflow rates change over the coming months, your actively homeless count will fluctuate. Give attention to your entire system! Reducing your actively homeless number requires accelerating your housing placements, yes, and also taking action to intentionally reduce people entering your system.

COMMUNITY & POPULATION

COMMUNITY:

Albuquerque CoC

POPULATION:

Single Adults

SUBPOPULATION:

Veterans

CURRENT STATE

CURRENT MONTH:

November 2020

CURRENT ACTIVELY
HOMELESS NUMBER

100

TARGET STATE

TARGET MONTH:

December 2020

TARGET ACTIVELY
HOMELESS NUMBER

30

YOUR MOST RECENT 3 MONTHS OF DATA

AUTOFILL DATA

Numbers reflect self-reported community data.

MONTH:

May 2020 June 2020 July 2020

TOTAL INFLOW

Newly Identified • Returned from Housing • Returned from Inactive

7 12 30

TOTAL OUTFLOW

Housing Placements • Moved to Inactive • No Longer Meets
Population Criteria

150 250 30

HOUSING PLACEMENTS




11 9 13

All fields are required. Averages calculated below are rounded up to the next whole number to avoid counting "fractional people".

GO!

Make your meeting match Cook Co.'s

- Do your math using the Target Move-In Dates Goal Calculator
- Get your monthly goal for target move-in dates (and housing placements)
- Find *that many* clients to house this month
- Include them in your next case conferencing agenda
- Set target move-in dates for each client

Client	Target Move-In Date
Jim Doe	25/11/2020 
Jane Doe	28/11/2020 
Mickey Mouse	20/11/2020 

Q&A *or*

Insights

Start picking clients for your meeting

Try these changes

1. Walk through the decision tree
2. Discuss your current goal with your core improvement team and stress-test it using the Target Move-In Dates Goal Calculator
3. Show up to your next meeting with a pre-selected list that matches your goal

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

- Pick Clients to Discuss, Hit Goals, and Leave No One Behind
- Target Move-In Dates Goal Calculator



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 sky is a light blue color, and there are white and light pink clouds on the left and right sides.

**Thanks for attending.
Tell us how picking clients goes!**

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