

Built For Zero.

Case Conferencing Summit

2020

Setup the BNL for Action

November 16, 2020

Agenda (Internal)

Welcome: Introduction and Objectives	7 mins
Using your own data for improvement, not compliance.	20 mins
Description of “Learning Loop” data elements.	8 mins
Demonstration of BNL template with dummy data.	15 mins
Q+A/Worksheet Completion	10 mins

Trainers



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Yes, these slides and session recording
will be made available on the BFZ website!
Check out the new Case Conferencing Resource Bank

Objectives for this session

- Describe the value of simplifying your By-Name List (BNL) to promote action.
- Identify changes to your BNL that you can implement TODAY.

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

Using Data for Improvement

Data-Driven Methods

Solid Data Infrastructure



Perfect Score on
All Singles BNL Scorecard



Reliable Data



Track Progress Over Time



Median locked in



6 consecutive points above
or below the median

In Built for Zero, we believe that using data to end homelessness starts with a solid data infrastructure to track progress over time, and inform your next move.

- **Quality Data**

- Quality data gives you the confidence to know that the trends you're seeing in your data are accurate.

- **Regular Reporting**

- Regular reporting gives you a rich archive of data to be able to watch trends over time.

- **Capacity Building**

- Setting up a solid data infrastructure early on increases your staff capacity by limiting time spent cleaning up and refining messy data.

Achieving a Quality BNL Requires ...



**Perfect Score on
All Singles BNL Scorecard**

28 of 28 items on the scorecard have
a “Yes” response



Reliable Data

3-month* data reliability within
15% margin (work towards 0%)

**This requires a minimum of 4 months of reported
data to calculate.*

Defining a Quality By-Name List (QBNL)

FULL COVERAGE

- All agencies and programs are represented
- List includes people sleeping in shelters and on the streets

PERSON-LEVEL DATA

- Each person has an entry that includes their name, history, health and housing needs
- Each person can be followed through the system

RELIABILITY

- Data balances month over month, just like your checkbook
- Changes in actively homeless numbers are accounted for in inflow + outflow

REGULAR UPDATES

- List is updated monthly, at a minimum
- As people's housing status changes, so do their list entries

Achieving a shift requires ...



Median locked in

10 points of data starting from the
Improvement Baseline Start Date



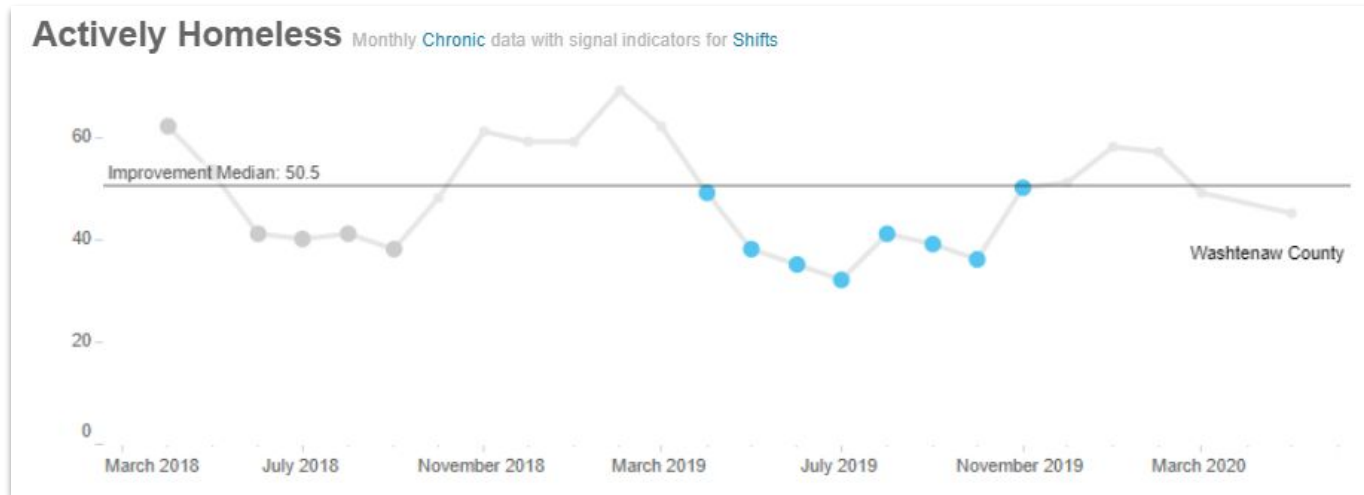
**6 consecutive points above
or below the median**

6 points in a row above the median
or
6 points in a row below the median

**Points that fall on the median are disregarded; they
are not counted toward the 6 point streak but also
do not break the streak*

Why does the Improvement Median matter?

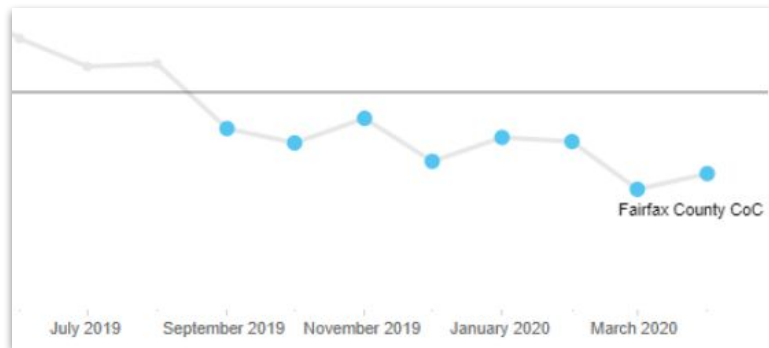
- The median represents the system “norm” - what we expect the system to produce if we don’t change anything about it
 - Once the median is set, new data points will naturally fall above and below the median at random
 - 6 points in a row above or below the median, however, is **statistically significant!** Try flipping a coin and getting 6 heads in a row - highly unlikely to happen at random! This is called a shift.
 - Shifts signal a change in system performance.



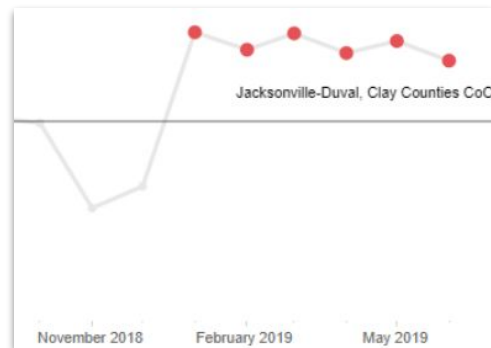
What shifts mean, and how to identify one

- A shift means the system has reached a new “normal” and is performing differently from before
- Is a shift “good” or “bad”?
 - It depends! For Actively Homeless Numbers, shifting above the median is bad (it means an increase in your Active #), but for Housing Placements, shifting above the median is good (it means you’re increasing your housing placements).
 - A shift does not necessarily mean a system improvement has happened! It’s just a signal that something has changed in a community’s system, and we need to investigate it!
- How will you know a shift has happened?

Blue dots on the PMT represent a positive shift (a decrease) in the Actively Homeless Number



Red dots on the PMT represent a negative shift (an increase) in the Actively Homeless Number



Functional Zero Threshold Definitions



of actively homeless veterans

\leq

6-month avg housing placement rate
OR
3 veterans

(Whichever is greater)



of actively Chronic homeless

\leq

3 chronic
OR
.1% of individual PiT count

(Whichever is greater)

What we know from monthly reporting:

1 Improvement Medians

Actively Homeless Monthly Veteran data with signa



Your **improvement medians** set starting points or norms to gauge incremental progress on the way to Functional Zero. As shifts occur, new norms are calculated.

2 Shifts + Functional Zero

Your data can show **shifts** in your system signaling it is performing differently than before.



Most notably, your data also tracks your progress to and ability to sustain **Functional Zero**.

Actively Homeless Population Monthly count for Veteran subpopulation(s)



3 Inflow + Outflow

Your data helps you track movement in and out of your system. High returns from housing can indicate that you need to work on stability plans and support services for newly housed clients.

Monthly Inflow & Outflow Red square at bottom indicates Inflow exceeded Outflow



How is a QBNL Confirmation Signaled in PMT?

Once the Quality Data date has been confirmed, communities will see the following changes in their PMT.

1. An **Improvement Median** will appear on the **Actively Homeless** run chart (on PMT: **Progress** tab)

2. From the **Quality Data** date onwards, the bars depicting their monthly actively homeless numbers will appear **teal** on the **Actively Homeless Population** bar chart (on PMT: **Progress** tab)



But reaching the threshold isn't all you need to do to achieve functional zero!

You also need to have...

- **A perfect score on the BNL score card** (that the coach feels confident about)
- **An accurately calculated quality data date** (this means resetting the quality data date to the last major data clean up)
- **0% data reliability over the past 6 months** (though getting to 12 months of reliability is the ideal)- the 6 month span must include data collected after the quality data date
- **No unexplained red flags** in the data (e.g. numbers that seem unrealistically low or high) - if there are “red flags” it doesn't mean the community won't be confirmed, it just means we need to ask more questions about what happened so we can explain it.

System Engine Data Confirmation

Texas Balance of State CoC - Abilene Engines for Veteran

	Actively Homeless Number	3 Mo Outflow Total	3 Mo Inflow Total	3 Mo Data Reliability
December 2018	3	27	23	0%

Month, Year of Month	Actively Homeless Number	Housing Placements	Moved To Inactive Number	No Longer Meets Population Criteria	Newly Identified Number	Returned To Active List From Housing N..	Returned To Active List From Inactive N..	Net Change	Monthly DR along Table (Down)
December 2018	3.00	12.00	0.00	0.00	4.00	4.00	0.00	-4.00	0%
November 2018	7.00	8.00	1.00	0.00	3.00	2.00	0.00	-4.00	0%
October 2018	11.00	5.00	1.00	0.00	9.00	1.00	0.00	4.00	0%
September 2018	7.00	5.00	1.00	2.00	3.00	0.00	0.00	-5.00	0%
August 2018	12.00	15.00	0.00	1.00	14.00	0.00	0.00	-2.00	0%
July 2018	14.00	7.00	1.00	0.00	4.00	2.00	0.00	-2.00	0%
June 2018	16.00	7.00	1.00	2.00	4.00	6.00	0.00	0.00	0%
May 2018	16.00	7.00	0.00	1.00	6.00	2.00	0.00	0.00	0%
April 2018	16.00	7.00	2.00	1.00	8.00	4.00	0.00	2.00	0%
March 2018	14.00	17.00	0.00	1.00	8.00	3.00	0.00	-7.00	0%
February 2018	21.00	6.00	0.00	0.00	9.00	3.00	0.00	6.00	0%
January 2018	15.00	5.00	0.00	0.00	6.00	4.00	0.00	5.00	0%

6 Month Minimum threshold

Data for Texas BoS Abilene is perfectly balanced (0% data reliability) meaning that changes in actively homeless numbers are accounted for in inflow and outflow. This signals that data management practices are robust and efficient and that data is being tracked in a consistent manner.

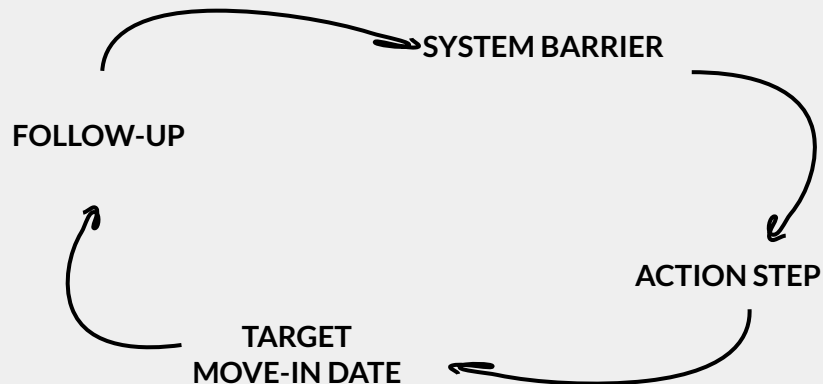
Why does the data for confirming functional zero need to be so precise?

If we want to bring about a lasting end to homelessness that leaves no one behind we need to...

1. **Uphold high standards.** Our mission is to bring about a *lasting* end to homelessness. We need to make sure our definitions and confirmation process are thorough enough to demonstrate credibility to people outside the sector.
2. **Validate the confirmation.** System improvement and driving population outcomes to functional zero is hard work, and we want to ensure that communities have the systems in place to sustain that effort. Confirming consistent data with precision gives the community credence to move their work forward with additional sub-populations.
3. **Learning what works.** Community members, government leaders, and the media want to know the story of how a community ended homelessness. Investigating the data helps us explain that story with a high degree of confidence and helps us to improve our approach in the future.

Implementing the Learning Loop Data Elements

Using Your BNL



Format your BNL for action

- Make it simple to look at; eliminate redundant columns
- Share it with the team for shared responsibility
- Include the Learning Loop columns that spur action & use them to document tests:
 - Current System Barrier
 - This Week's Action Step
 - Staff Responsible
 - Target Move-In Date

Tracking Housing Process Buckets

Want this resource?
Case Conferencing Tool Bank:
BNL Template

Bucket		Data Status Changed
Income Maximization	▼	10/30/2020
Housing Navigation	▼	10/30/2020
Outreach	▼	11/2/2020
Outreach	▼	9/27/2020
Income Maximization	▼	3/13/2020
Outreach	▼	11/9/2020
Housing Navigation	▼	11/10/2020

How to implement the bucket system:

1. Identify the unique phases in the user journey based on their primary need.
2. Add 2 columns in your BNL:
 - Bucket
 - Date Status Changed
3. Sort BNL by Bucket and talk through all clients in each Bucket before moving on.
4. Update the clients' Bucket, Date Status Changed, and Target Move-In Date each meeting.

What we can learn from case conferencing data:

1 System Bottlenecks

By tracking the length of time between stages in the housing process, you can identify and problem-solve for system-level barriers.

2 Goal Forecasting

When you collect target move-in dates on every client, you can forecast whether or not you'll meet your monthly housing placement goal.

3 Bright Spots

You can also track length of time between buckets in order to celebrate staff, or agencies, that consistently perform well.

BNL Template Demonstration

Q&A *or*

Start tweaking your BNL

Start tweaking your BNL

Try these changes for your next meeting:

1. Add in the Learning Loop and Process Buckets data elements.
2. Simplify the way your list to drive improvement.

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 your BNL changes go!**

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