Facilitate the Learning Loop

Break the updates meeting, and generate actions for housing placements

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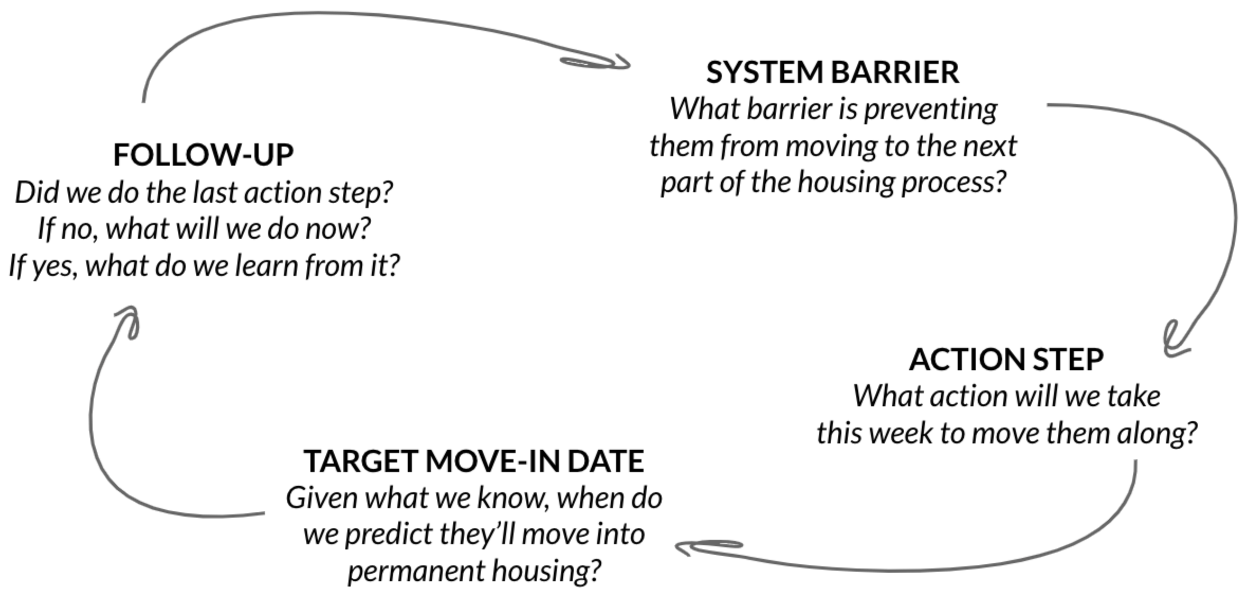
Use this flow for each client to generate action and learning



Use a consistent facilitation flow for each client

- **State the client's name**, and amount of time they've been waiting on the by-name list.
- **Follow-Up:** Ask what action has been taken to house the client since the last meeting.
- **System Barrier:** Define the largest obstacle the client is facing this week. Direct your group to focus on the barrier in your housing process, *not* a barrier internal to the client.
- **Action Step:** Record a new action step(s) to move them closer to housing.

- **Target Move-In Date:** Record a target move-in date, or edit the existing target move-in date, to predict when they will move into housing. Stress that this prediction is used for our system improvement, never judgment!

Common system barriers

- Needs Engagement
- Needs Assessment
- Needs Documentation or Verification
- Needs Program Enrollment
- Needs Subsidy
- Needs Unit

Ask questions that provoke action and problem solving

- Start with the previous next steps: "At the last meeting you said that you would do ____ with this client. How did that go?"
  - If the next step happened, ask about the result and what the new next step should be. If applicable, call attention to any new learning that the team can be gleaned from what worked.
  - If the next step did not happen as planned, ask questions like "What happened instead?" or "What diverted it from going as planned?" Use it as an occasion to learn about your system and plan the next step.
  - Save precious meeting time! Collect this information before the meeting via HMIS or email so that, in the meeting, you can skip straight to the creative problem solving.
- When you hear a commitment or next step, restate it to confirm, and ask for a by-when date. Ensure that the note taker is recording it.
- Redirect to solutions: A great idea may be disguised as a mundane update or barrier, so listen for pathways to solutions and use these to reflect back a possible next step. When appropriate, encourage others who are not this client's case manager to offer ideas or support on action steps.
- Consider who is best to facilitate: Great facilitators are ready to lead the group to action. They enter the room with ideas about how to shape the experience. When the conversation isn't delivering results, they take charge and try something new.

Ask follow-up questions that move the conversation toward action

- "What is your theory of what needs to happen, from A to Z, in order for this person to move into housing?"
- "What obstacle in our system are they facing this week?"
- "What is your next step in housing them?"
- An 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?"
- Grow multi-agency teamwork: Listen for opportunities to pull in help for a specific action step. For example, if one case manager is having a hard time locating a unit for a client, ask if staff from a different program can help with housing navigation.
- Engage resistant providers by asking for help with a specific action step: They may be hesitant to take part in larger initiatives but ready to collaborate if it means housing a client faster or easier.

Use notes to establish commitments and create accountability

- Ask your meeting Scribe to take notes. If you don't have someone in that role already, view the job description here and ask someone to volunteer to fill this role.
- Ensure that each commitment or action step is recorded and shared. Include a date! Recording commitments is an essential step to building accountability.
- Share notes immediately after the meeting ends so that participants have a record of their and others' commitments.
- Record notes in purposefully created columns on the by-name list instead of a catch-all Notes area (see the BNL Template).
- Establish a customary place and time to post notes so that participants know what to expect. Make sure that they're posted in a format and location that all key stakeholders can access (i.e. VAMC employees cannot access Google Docs).
- Pick up from where you left off: Use notes from the previous meeting to expedite conversations in today's meeting. Cut out repetition except where intentional.
- Calendar next steps on the spot: At the end of each meeting, allow participants a few minutes to summarize the next steps they have committed to taking. Afterwards, guide participants to add them to their calendars or to-do lists.