

Facilitator's Guide to Transforming Team Culture

Build skills to build new cultural norms and navigate common problems

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

In this guide, we explore five opportunities for change:

- Generating Action-Oriented Solutions for Clients
- Moving from "My Client" to "Our Clients"
- Housing with Urgency
- Clarity on What I'm Doing, When
- Managing Time to Leave No One Behind

Generating Actionable Solutions for Clients

Solving for Problem-Fixated Narratives

Context

Often, case conferencing meetings can become a space where providers share their struggles working with clients. While some level of sharing can be beneficial, it can easily turn the meeting into a venting space, preventing the meeting from becoming a space of co-creating accomplishments. It's important to listen and empathize through tough moments, but only focusing on what's going wrong for clients can create problem-fixated narratives that take over the meeting and prevent problem-solving. Facilitating through a lens of positivity and creativity is a skill that you can grow with intentional practice.

Signs to Watch For

- A provider taking up lots of time sharing the client's barriers (e.g. drug use, age, disability), even when they are not direct obstacles to the housing process.

- Providers using absolutist language such as “We’ve tried everything” or “Nothing is working.”
- A team member speaking from a ‘Scarcity Mindset,’ essentially speaking from a defeated and constrained perspective, rather than identifying assets and non-traditional resources to leverage for individual cases or process improvements.

Set Expectations for the Meeting

- Encourage providers to look for **barriers within the housing system**, rather than within the client.
- Frame the meeting as a space to engage in **creative problem-solving** to reach the agreed-upon objectives for this meeting (e.g. housing more people).
- Create a **contrast with unproductive meetings**. For example, “Some of you may have attended case conferencing meetings where lots of problems were discussed but not many solutions. We’d like to break this pattern and dedicate our time and effort to finding creative next steps.”
- Use “Strengthening the Team” time on [the agenda](#) to establish guidelines about **what are acceptable ways of speaking about clients**.

Strategies to Facilitate for Problem-Solving

- More often than not, focusing on problems is an issue of provider frustration or burnout. **Reflect back their frustration and** demonstrate that you **understand that their work can be challenging**.
- Help them **look forward** as you **acknowledge their frustration**. It may sound like, “It sounds like it’s been tough working with this client. I wonder if the group can help us come up with one thing we haven’t tried before, to try next week.”
- Ask questions to narrow down this week’s specific challenge. **Investigate what system barrier they’re currently facing**, where they should be in next, and what actions will move them there. This will help shrink all the perceived problems into the one specific problem that’s most relevant to the housing process. When in doubt, stick to the [learning loop](#) flow here.
- Use target move-in or milestone dates to create a smaller accomplishment that is easier to achieve. **For example, if the client is resisting basic engagement, your next milestone can be getting them into the office for an intake appointment. Co-create the milestone with the provider, ask them to predict a date for it, and celebrate the accomplishment when it happens.**
- Find **opportunities for direct support that could be offered** by yourself or other members of the group. Something as small as making a phone call or driving a client to one appointment can help staff feel supported and motivated.
- If the process comes to a true roadblock, **suggest working on other parts of the housing process**, such as collecting documentation, in the meantime.

Words to Use

- What does the **next step** look like for this client?
- *For cases where a lot has been tried and there’s a challenging obstacle:* What’s **something we haven’t tried before** that we can **test** this week?
- **What would it take** to get the client through X obstacle?

- Use **reflections + summaries** to make the big problem that you heard smaller. For example:
 - Provider: "This client has been showing up to every appointment drunk. I'm supposed to take her to look for units but I don't even know if she wants housing at all and I don't know if any landlords will take her because of her record."
 - Facilitator: **Reflect the provider's frustrations** "That sounds tough to navigate through". **Reflect back the housing process barrier you heard**. "It also seems like the next thing that needs to happen is to show her units". **Then ask an action-oriented question**: "What do you imagine are some potential units that could work for her?"
- If you **can't identify what the barrier is, ask clear closed-ended questions** to get there. For example: "So she has all her documentation and voucher ready and just needs the unit. Is that accurate?"

Moving from "My Client" to "Our Clients"

Solving for Provider Silos

Context

Some providers may not be as ready to share information or collaborate as others are. The more you lead providers to **work as a unit**, the more likely you are to **use everyone's strengths to house clients effectively**.

Signs to Watch For

- When asked about a client, a provider may give you a brief or fuzzy answer such as **"We're working with them."**
- A provider appearing **irritated or uncomfortable** as you ask probing questions.

Set Expectations for the Meeting

- Providers are more open to sharing if it means they may house their clients easier or faster as a result. Frame the meeting as a place where **opportunities for mutual support are identified** and used.
- Clearly **frame your role as the facilitator**. Explain that you ask questions about each client to get specific on barriers and opportunities, not to establish authority.
- Talk about the meeting as a space for the group **to capitalize on everyone's superpowers**. Reflect the fact that some providers have had to work alone for long and that at this meeting we are developing shared responsibility for housing each client.

Strategies to Facilitate for Problem-Solving

- Ask **clarifying and opening questions** using non-authoritative language
- Develop a **strong inventory** of what each person can offer to others within the case

conferencing group. You can use team strengthening time in the agenda at one meeting for this.

- Look for **specific opportunities** to make **concrete connections** between the group. For example, if a client is in the housing navigation stage and your clarifying questions reveal a need for units, suggest that a provider from another agency helps out with this action step.

Words to Use

- **Reflect the opportunity you heard:** It sounds like the client is wanting a unit in X county where you don't usually do much housing navigation. **Then use open language to create a suggestion:** I wonder if X person from X agency can share a few unit options with you.
- **I wonder** if this client would do well with additional support with X agency.
- **I'm imagining** a scenario where we help this client fix their car to build some trust. How do you think this would play out?
- **I'm curious** if the client would be open to units in X area since it also has what they're looking for.

Housing with Urgency

Solving for Lack of Urgency

Context

Because homeless services systems have historically been designed to manage homelessness and not towards the outcome of ending it, the practices surrounding housing can lack urgency. Most providers are not used to clear timelines for housing each client, putting the process at risk of dragging on. **Housing with urgency is behavior change that takes time to cultivate.** You can facilitate case conferencing in a way that promotes urgency, building new perspectives and consequently new habits.

Signs to Watch For

- When asked about next steps for a client, **long timelines are offered**
- Resistance to **offering any timelines at all**
- Resistance to providing **target housing/milestone dates**

Set Expectations for the Meeting

- Explicitly name that the meeting is a space to brainstorm about **how to house clients faster.** The faster you house people, the more people you can house per month. And the more people you house per month, **the more likely you are to end homelessness.**
- Prime the team for mindset change. **Explain to your case conferencing team that traditional ways of working, with longer timelines, are designed to manage homelessness, not end it.** Illustrate case conferencing as a space to change some of

the ways we work together in order to reach better outcomes for people waiting in homelessness.

- Explain to your team that you will be asking them for **target housing dates and dates on action steps as a tool to create excitement and energy, and not to judge or penalize them.** It's data for learning, not for judgement.

Strategies to Facilitate for Urgency

- When you hear long timelines in relation to action steps, ask questions to **break the action down into steps.** Ask how long each one smaller step will take.
- Offer **direct support** from yourself or other members of the group to **speed up steps.**
- Use **target move-in or milestone dates** to help providers **imagine an end to the individual's housing journey.** To sidestep resistance, use open language such as, "If we go all in for this client, what's the soonest they can get into housing [or get this milestone accomplished?]."
- **Celebrate** when individuals are housed on or before their target move-in date.
- **Share length of time data** for every agency to build accountability. Celebrate when the numbers decrease!

Words to Use

- "If we go all in for this client, when **do you predict** they would be housed?"
- "Let's assume our plans for this client work out, how soon **do you imagine** can they be in housing?"
- "What's an **aspirational** target move-in date for this client?"
- *If the situation is truly complicated (or the housing process is just beginning?) with a client or things are at a halt, get staff to predict a **target milestone date.** Milestones could look like:*
 - *Getting a client who resists basic engagement to complete assessment*
 - *Getting a client to meet a health/wellness goal in transitional housing (ex: GPD)*
- Use this language for **a target milestone date:** It sounds like it's tough to predict a move-in date for this client because of an obstacle. Let's name it and set a date for when we anticipate to complete working through it. **What is the milestone here and how soon can we accomplish it?** When do you anticipate this step to be done by?
- How can the group support you in speeding up this step by, let's say, a week?
- **What do you think it would take** to get this client's voucher in the next two weeks?

Clarity on What I'm Doing, When

Solving for Lack of Clarity

Context

When there is a lack of clarity in **determining next steps, who's responsible for them, and when they will happen,** it can often be confusing for attendees and slow down the housing process. **Facilitating for clarity is simple and can have great payoff.**

Signs to Watch For

- **Poor documentation** including missing next steps and target move-in dates
- **Low quality next steps** such as "continuing to work towards housing"
- People showing up **without having accomplished last week's next step because they weren't clear it was assigned to them**

Set Expectations for the Meeting

- Explicitly name that the meeting is a space to brainstorm about **how to house clients faster**. The faster you house people, the more people you can house per month. And the more people you house per month, **the more likely you are to end homelessness**.
- Prime the team for mindset change. **Explain to your case case conferencing team that traditional ways of working, with longer timelines, are designed to manage homelessness, not end it**. Illustrate case conferencing as a space to change some of the ways we work together in order to reach better outcomes for people waiting in homelessness.
- Explain to your team that you will be asking them for **target housing dates and dates on action steps as a tool to create excitement and energy, and not to judge or penalize them**. It's data for learning, not for judgement.

Strategies to Facilitate for Clarity

- Pre-meeting, **assign a scribe** and have a **brief conversation** with them about what you would like them **to focus on documenting**. This will allow you to be more present to facilitate and ensure everything is well-documented.
- It's easy to get lost in conversations and not summarize what comes next. For every client, **make sure you ask what the next steps are and what the target housing/milestone date is**. Clarify further by asking **who will do it and by when**.
- If given ambiguous answers about what the next step will be, **ask questions that drive towards specificity**.
- At the end of the meeting, allow a few minutes for attendees to look at the BNL and **put next steps on their calendars/to-do lists**.
- **Share out the BNL afterwards** so participants can go back to it throughout the week.

Words to Use

- Use a **summary** and **closed-ended question** to shift the conversation towards clarity. For example:
 - It sounds like there are a few options for verifying disability for this client. Which option are we going with and who will take on the task?
- You can go back and get clarity on a conversation that was left unclear as well:
 - **Narrate the situation**: It looks like we've decided we should take this client for unit showings. **Narrate the gap**, but it isn't clear who will be taking them. *Ask the closed ended-question*: Who is willing to take on this task?

Managing Time to Leave No One Behind

Solving for Time Challenges

Context

While time management may seem like a simple issue, **it may be a significant barrier to effective case conferencing**. Managing the meeting in a rhythm that **allows for space and creativity yet accomplishes desired outcomes** is a facilitation skill that can be cultivated and improved.

Signs to Watch For

- **Skipping over** parts of the agenda, including talking about clients.
- **Gaps in documentation** for next steps and target housing dates.
- **Low quality next steps** due to rushed discussions
- The meeting going **over time** and/or visible signs of attendees **losing interest**

Set Expectations for the Meeting

- Frame the meeting as a space to have quality discussions and do problem solving **without leaving out clients due to time**.
- As you prepare for the meeting, you may find that you have **2-3 minutes to discuss each client**. **Share that with the group** as a general guideline while accounting for small variations.

Strategies to Facilitate for Managing Time

- Before the meeting, **collect information about what happened during the last week** and summarize it as you start the discussion. This will shorten conversations about what happened before and allow more time for brainstorming.
- If conversations drag on, **summarize the important parts of it and ask questions** to move the group on to the next item.
- **Reference the agenda** as the reason to move on, in spite of a good conversation.
- Assign a **timekeeper**, depending on your group size and efficiency.

Words to Use

- **Reflect the value of current conversations**, "I recognize that there's a lot of value in this conversation. I would love for us to speak more about this" **then reflect the delay you're noticing** "and I notice we're a few minutes off our time here" **then gently suggest moving on** "I wonder if we can move on here so we have time to talk about the rest of today's clients."
- Suggest **taking good but irrelevant conversations offline**. For example: "I'm so glad you brought up PIT count plans. There's lots of planning we'd love to talk about, and I imagine we might be able to have a better and longer conversation offline. Let's find a time on both our calendars this week after the meeting."