

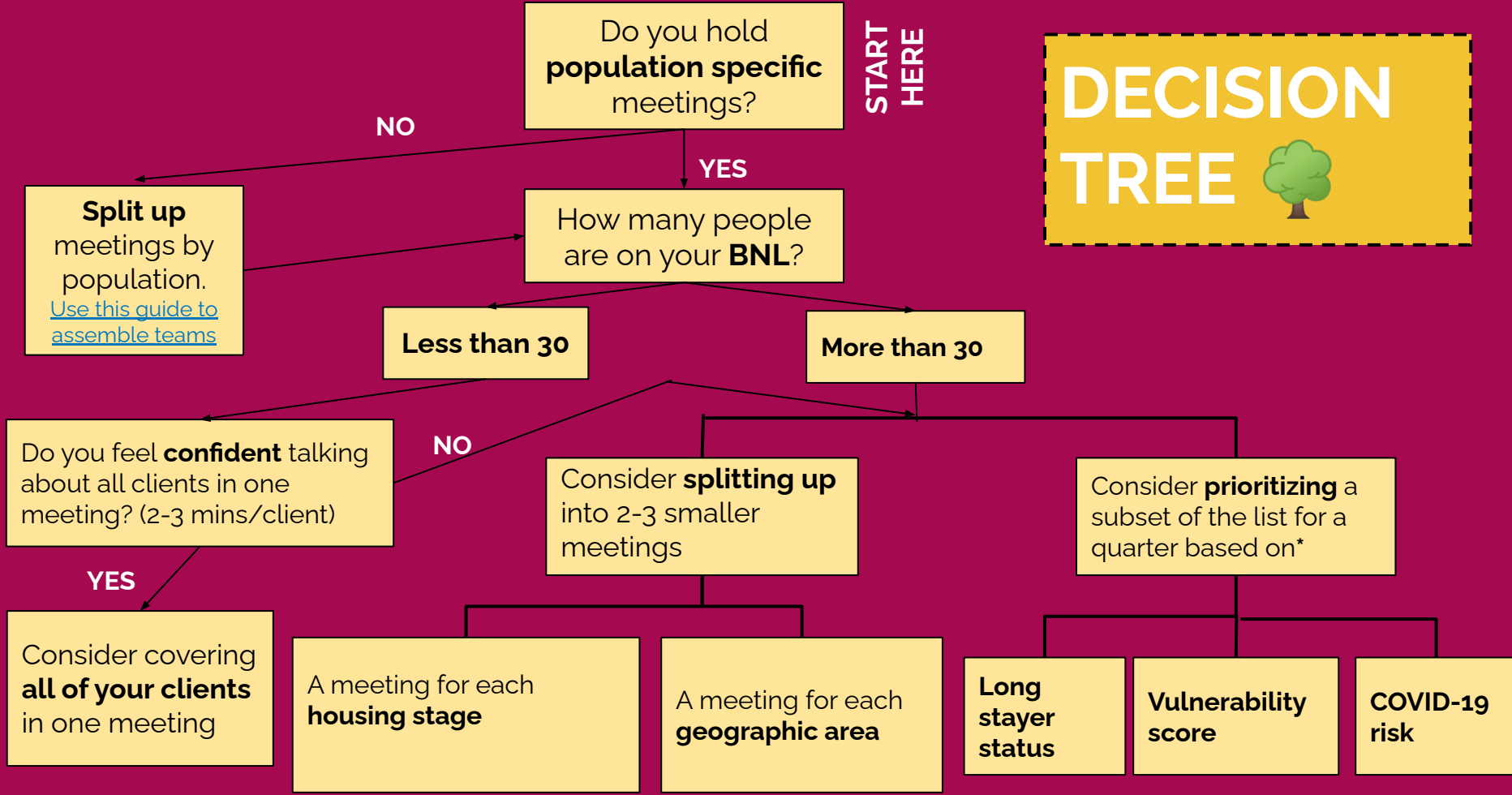
How do we decide which clients to talk about in case conferencing?

Teams often wonder who to prioritize for discussion in case conferencing.

Choosing who to talk about with intentionality can help you use case conferencing strategically to make gains and meet goals.

This tool is based on community best practices and provides you with **a decision tree + 6 design principles** that will help you decide who to discuss.

DECISION TREE



START HERE

**This is a list of examples, not exhaustive*

How do we decide which clients to talk about in case conferencing?

6 DESIGN PRINCIPLES

- ★ Work on a pre-selected list
- ★ Break up by population
- ★ Shrink the change
- ★ Allocate 2-3 minutes to discuss each client
- 🔥 Align your choice with your community goals
- ★ Test & learn

Work with a pre-selected list

1

Decide who to talk about before the meeting in order to prevent clients from falling through the cracks.

While bringing up clients for problem-solving on the spot (the clinical model) may be helpful at times, it hinders you from creating movement on the BNL.

Break up by population

2

Breaking up by population will help you gather the right team, connect the relevant resources, and **give yourself the gift of focus.** 🎁

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

For more guidance on who to invite by population, use this [Partners to Invite Checklist](#).

Shrink the change: *Break it down*

3

If your list has more than 30 clients, you may not be able to discuss them all in one meeting. Consider splitting up into **2-3 meetings** or **breakouts of a single meeting**. We recommend splitting up based on the following buckets:

MATCHING

Connect clients to housing resources and coordinate outreach

Pro goal: Shorten length of time from ID to match

CASE MANAGEMENT

Problem solve around preparing client for housing, including getting subsidy, maximizing income, and connecting to wrap-around services

Pro goal: Shorten length of time from match to housing navigation

HOUSING NAVIGATION

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

Pro goal: Shorten length of time from housing navigation to move-in

More on housing buckets here [insert link]

Shrink the change: *Prioritize*

3

If your team does not have the capacity to splitting up the meeting into multiple meetings, consider focusing on a subset of your by-name list for a quarter. Here are some options for groups you can focus on:

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

Shrink the change: *Mix & Match*

3

Think of the principles *Breaking it down* & *Prioritizing* as two tools you can combine to come up with a formula that works for the complex needs of your community. Here are a few examples of how to do that:

Breaking down a 300-person list into 3 meetings (or meeting breakouts), then prioritizing the top 30 most vulnerable of each 100

Prioritizing long stayers for half the meeting, then focusing on another set of clients for the other half to avoid staff burnout

Breaking down the list into 3 geographic areas, then prioritizing clients with COVID vulnerability within those areas

Allocate 2-3 minutes to discuss each client

4

As you make the decision of how to structure your meetings, allow 2-3 minutes to discuss each client. You're balancing two factors here: **Quality & time efficiency.**

Your goal is to be able to have **quality discussions around problem solving for each client while leaving no one behind.**

Align your choice with your community goal

5



Case conferencing can be most transformational when you structure it to meet your community goal. Here are a few examples of goals and structures that align with them:

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

Structure: Prioritize by **COVID risk status**

Goal: Reduce **length of time** from ID to move-in by X days

Structure: **Split up by housing stage** and set goal for each meeting

Goal: Reduce **# of homeless vets**

from 100 to 50 by X date
Structure: Prioritize by **who can we challenge ourselves to house in the next 30 days**

6

Test, measure, & learn

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, improvements in your length of time or actively homeless data, and increases in your housing placement rates.