



# Case Conferencing Peer Sharing Call

August 2, 2023

# Welcome!



**REMINDER: THIS CALL IS BEING RECORDED**

Mute your  
audio

Turn on your video  
(if you want)

Say hi in the chat box! Tell us:

- Your Name, Pronouns, Role, Community and...
- What tells you a meeting has been a success?

## Open & Welcome

**Case Conferencing Academy Refresh**

**Community Feature: Northern Colorado**

**Open Share**

**Community Feature: Tucson/Pima County**

**Open Share**

**Reminders + Wrap Up**

# Facilitator



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# Who's in the (virtual) room

- Clackamas County CoC
- Colorado BoS Southwest Region
- Northern Colorado CoC
- Pikes Peak CoC
- Santa Fe City
- Spokane City and County CoC
- Albuquerque CoC
- Atlanta CoC
- Baltimore City CoC
- Chester County CoC
- Clark County
- Colorado BoS Roaring Fork
- Columbia-Boone County/Missouri Balance of State CoC
- Guilford County CoC
- Kansas BoS Douglas County
- Kent County
- Long Beach
- Maine Hub 2: Cumberland
- Maine Hub 6: Central
- Maine Hub 7: Penquis
- Maine Hub 9: Aroostook
- Metro Denver CoC
- Mid-Willamette Valley Homeless Alliance
- Missoula
- Nashville/Davidson County CoC
- Newark/Essex County
- Northwest Louisiana CoC
- Omaha/Council Bluffs CoC
- Pasadena Continuum of Care
- Phoenix/Mesa/Maricopa County Regional CoC
- Pinellas County CoC
- Portland, Gresham/Multnomah County CoC
- Richmond/Contra Costa County CoC
- Sacramento City & County CoC
- San Diego City & County CoC
- Sonoma County CoC
- South Central Indiana
- Texas Balance of State CoC - Lubbock
- Thurston County CoC
- Tucson/Pima County CoC
- Virginia Balance of State - Valley Homeless Connection
- Washington County CoC
- West Virginia BoS CoC
- Winston-Salem/Forsyth County CoC



# Case Conferencing Academy Refresh

# Path to Zero: Core Elements

## 1 Leadership Engagement

System-level leaders understand the current state and sponsor meaningful changes to local systems

## 2 Shared Aim and Strategy

Clear northstar aims and milestones around ending homelessness aligning resources and action around an evolving strategic framework

## 3 Quality Data

Developing and sustaining systems that produce actionable data to guide effort to improve and change systems

## 4 Improvement Science Dosing

Developing improvement science capability at all levels of the system appropriate to each stakeholder group

## 5 Driving Change & Improvement

Putting the strategy into action with an operational structure that activates testing cycles and implements change

## 6 Clearing the Path & Problem-Solving

Dynamic collaborative problem-solving across stakeholder groups, including results-focused case conferencing.

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# What we mean when say 'case conferencing'

## Action-Oriented

Case conferencing meetings should ultimately be centered around one goal: to **move people experiencing homelessness into housing** as quickly and sustainably as possible.

To make that happen, these meetings need to be centered around identifying actionable next-steps with ambitious deadlines.

## Measurably Effective

Case conferencing meetings should be regularly evaluated to **ensure that the practice is an effective way to reach your desired outcomes.**

Not only should you see impacts around Length of Time measures, or Housing Placement Rates, but you should also see impacts on the overall experience of attendees.

## Team Building

Case conferencing meetings should **create a culture of knowledge-sharing and mutual support.** Your meeting should be a safe space for attendees to ask for, and offer, support as needed.

When your team culture is healthy, your team is more motivated, and there's shared accountability without autocracy, which allows for more effective, and more sustainable, service coordination.

# What we DON'T mean

## A Reporting Meeting

There's a reason we want everyone in attendance. It's not to ask people for favors, or to report-back on progress, it's to pull on the collective genius of the group.

*Tip: Ask everyone to submit updates on the next-step identified at the previous meeting 24 hours before the upcoming meeting.*

## A Referral Meeting

Coordinated Entry referrals should be happening live whenever possible.

Each week you wait for a meeting to make a program referral is another week someone spends experiencing homelessness.

*Tip: If referrals can't be done through HMIS, create a process where referrals happen via email, and create a flowchart to help agencies navigate the process.*

## An Email

If you did the math, how much would this meeting be costing you? Are you providing enough value to justify it?

Keeping an open feedback loop helps you gauge what value the meeting offers, and in what ways it could be improved to provide more value.

*Tip: If meetings do feel like they could be an email, that just means it's time to test something new! Solicit feedback from attendees to come up with creative ways to improve it.*

## Case Conferencing Transformer: Changes Roadmap

### FACILITATE THE CONVERSATION

#### Ask consistent questions about each client to promote action and learning

"Where is this client in the housing process now?"

"What can we learn from the action steps discussed last time?"

"What in our housing process is the client's main obstacle this week?" Remind your team that in this conversation we'll focus on barriers over which we have control. That means putting obstacles that refer back to the client, such as "They are drinking."

"What's the next action step we'll take? Who will do it, by when?" You may have multiple action steps per client.

Not Yet

Sometimes

Perfectly

What did you try?

How did it go?

How will you make it stick?

#### Set target move-in dates to enable learning

Ask about each client, "Given what we know, when can they move in? Setting a target move-in date is an important part of the process that can be done in a way that gauges clients' flow through your system."

When someone sets a target move-in date, it's important to make it part of the process that can be done in a way that gauges clients' flow through your system. Brainstorm creative new answers to the question.

Build provider buy-in by framing target move-in dates as a goal for judgment. When you set and review housing strategies that work, identify housing placements.

Why?

What did you try?

How did it go?

How will you make it stick?

Introduced target move-in dates, and asked case managers to set a target move-in date for each client.

People set target move-in dates, but they weren't very ambitious. GPD set target move-in dates 2 years out.

Using the tally sheet to create shared ownership over collecting target move-in dates.

Chose a test

Made a plan

Took notes

Made a change

# Change ideas that drive action

## **Change idea #1:**

Prepare for your meeting

## **Change idea #2:**

Use the Learning Loop

## **Change idea #3:**

Test target move-in dates

## **Change idea #4:**

Establish a shared (and ambitious) goal

## **Change idea #5:**

Get the right people to the table

## **Change idea #6:**

Empower others to lead

## **Change idea #7:**

Visualize the process

## **Change idea #8:**

Set up your BNL for improvement

# Making habits stick

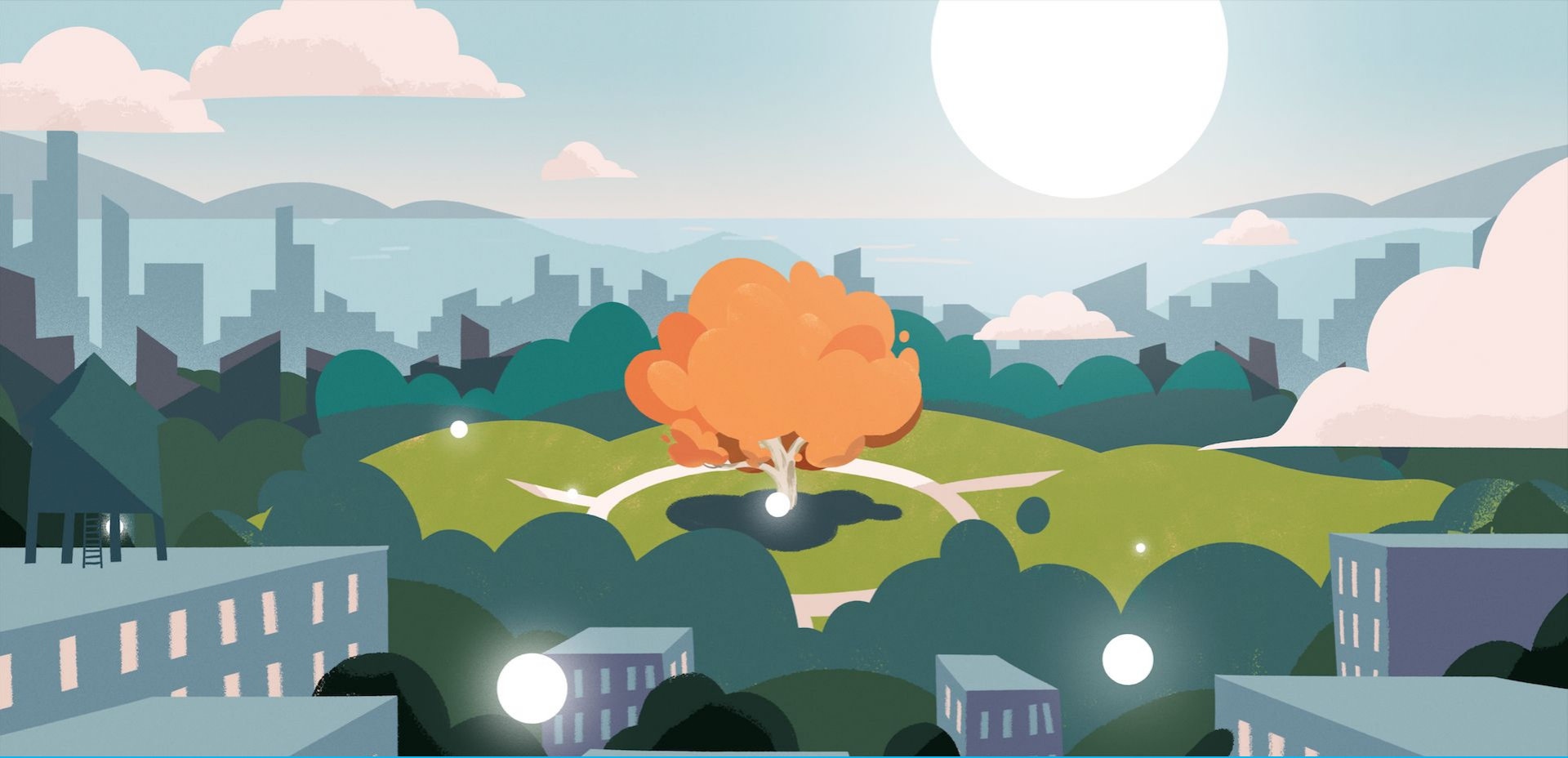
## Case Conferencing Tally Sheet

	Meeting 1 date:	Meeting 2 date:	Meeting 3 date:	Meeting 4 date:
How many clients were discussed?				
Of the clients discussed, for what percentage was there an action step, with due date?	%	%	%	%
Of the clients discussed, for what percentage was there a target move-in date <i>within the next month</i> ?	%	%	%	%
What percentage of action steps were completed after the last meeting?	%	%	%	%
How many people were housed since the last meeting?				
What changes did we try today?				
For the next meeting, which metric will we try to improve, and what change(s) will we make in order to improve it?				



# Community Feature: Northern Colorado

**Tell us: What's worked for you?**



# Community Feature: Tucson/Pima County



**Tell us: What's got you stuck?**

- **The last Path to Zero call, Data Office Hours: Using Data for Improvement will be August 17, 2023, 3 – 4 p.m. ET**
- **Learning Session registration is OPEN!**
  - This year's Learning Session is being held Sept 20-22 in Washington DC! Reach out to your team lead to register, and if you are unsure who to reach out to, email us at **[bfzlearningssession@community.solutions](mailto:bfzlearningssession@community.solutions)**

**Reminders + Wrap Up**

# Rapid Feedback

