

Learning Session Take Home Guide

Path to Zero, Fall 2023

Purpose

The Learning Session is an opportunity to connect with your team and have a distraction-free space to plan for the work to reduce and end homelessness in your community. We recognize, however, that not everyone who is needed for those conversations is always in the room. This guide will assist you to develop an agenda & facilitate a meeting in your community to socialize the work that your team began and bring a broader group of stakeholders into the work plan you began at the learning session.

How to Use:

This guide is split into three parts: **Starting Points** for bringing the Learning Session back to your community, **Content/Resources** to facilitate the experience, and **Examples** of what these meetings can look like.

Starting Points

- **Clarify the Purpose of Your Meeting.**
 - Are you meeting to set or finalize your aim & goals? Or are you meeting to socialize your aim & goals?
 - What content from the Learning Session would you like to dive deeper into? What content was your team not able to finish? What content needs to be socialized with your broader team?
 - What would you like to walk away from this convening with? (what are the meeting objectives?)
 - ASK YOURSELF: "if we leave this time with <insert> it will feel like we have made progress", or "This meeting will be a success if <insert>".
 - Develop and review meeting objectives. Can all of the objectives be achieved in one meeting or will you need to hold more than one meeting?
- **Coordinate Your Guestlist.***
 - Priya Parker in the *Art of Gathering* suggests asking "Who fits and helps fulfill the purpose? Who threatens it? Who do I feel obliged to invite?"

- Consider who has the authority and ownership to set aims/goals versus who needs to buy into and champion the aims/goals that you set.
 - First identify the group that will set goals and begin by meeting with them for planning and aim/goal setting
 - Think about how you will schedule time to meet with and build buy-in/champions with high level leadership
- Consider how people with lived experience of homelessness will be meaningfully included in the process of setting aims/goals
- One way to think about this is to make sure that everyone who is attending has a role or a clear goal for being there.
 - If you aren't sure of someone's role or purpose it may be a chance to practice generous exclusion!

“When I talk about generous exclusion, I am speaking of ways of bounding a gathering that allows diversity in it to be heightened and sharpened, rather than diluted in a hodgepodge of people.” — Priya Parker

Point to Ponder

It is really easy to use *community* as a blanket term when considering who to have at the table, but that leaves room for confusion about which stakeholders should be part of each conversation and why. Try to get specific when talking about what part of the community should be invited to each conversation and for what reason.

- i.e. direct service providers, PLEH, Improvement Team members, decision makers/system level leadership

- **Consider Context.**
 - Another element of knowing who needs to be in the room is understanding how much context needs to be shared to have a generative conversation. With the nature of some people having been at the Learning Session and others not, consider what framing or information is needed to have a conversation everyone can participate in.
- **Create Your Space.**
 - Virtual or In person?
 - If in person (recommended!) ensure the space is accessible
 - One time or a series?
 - Will people be expected to do prep work or is it contained?

Content/Resources

- [Meeting Planning Tool](#)

- [Toolkit: Setting an Aim, Goals, Drivers, and Milestones](#)
- [Toolkit: Socializing an Aim, Goals, Drivers, and Milestones](#)
- [Drive Diagram & Milestone Posters](#)

EXAMPLES

EXAMPLE MEETING A

Setting and Finalizing Our Aim / Goal

Clarify the Purpose of Your Meeting

We set an aim to reach Functional Zero for Veterans by October 2026 at the Learning session. We must get buy-in on that aim and set goals/drivers with members of the improvement team and other key stakeholders who weren't at the learning session

Objectives

- *The Improvement Team will confirm the Aim that was set at Learning Session*
- *Leave this meeting with two clear, actionable goals that will move us toward our aim*
- *Leave this meeting with established drivers to move community towards the goals*
- *Outline 6 Month Milestones towards improvement*

Coordinate Your Guestlist

Must Attend	Role/Goal
Vets Improvement Team Lead	Primary facilitator for the meeting
Data Lead	Can speak to the data behind the aim that was chosen. Will give a 3-5 min overview of the aim that was chosen and why.
SSVF Manager	Attended the LS and is able to provide an overview of the conversation around goals that had occurred, bringing the group to now
HUD VASH Director	Can speak to the role VASH will play in achieving FZ
GPD Program Manager	Can speak to the role GPD will play in achieving FZ
SSVF Housing Navigator	Can speak to how increasing housing placement rates will affect achieving FZ

Not This Meeting	Roal/Goal
System Leaders	Will bring them into this conversation after the aims and goals have been drafted for buy in

Consider Context

- Improvement Team Lead, Data Lead and SSVF manager were all at LS
 - Data Lead will give a 3-5 min overview of the aim that was chosen and why
 - SSVF manager will give a 10 min overview of conversation around goals that have occurred previously
- 2 members of our Improvement Team are brand new to the work
 - Improvement Team Lead will send them some information about BfZ, Learning Session materials, and community progress toward Functional Zero one week prior with opportunity to answer any questions so that they are able to participate.
- Provide overview of Aims, Goals, Milestones, and Drivers for the group at the beginning of each section to create shared language and understanding of the objectives.

Create Your Space

- In person
- 3 hours
- No computers or phones out during content

Agenda	
Welcome and Intention Setting	15 minutes
Context Setting <ul style="list-style-type: none"> ● Recap of learning session ● Share the aim & rationale 	15 minutes
Set Goals	1 hour
Break	15 minutes
Drivers and Milestones	1 hour
Establishing Next Steps <ul style="list-style-type: none"> ● We will leave the space with either: finalized goals for the action cycle or a plan of action to be completed so goals can be finalized by [specific date] 	10 minutes
Closing	5 minutes

EXAMPLE MEETING B

Socializing Our Aim/Goal

Clarify the Purpose of Your Meeting

We set an aim and goals at the learning session, and now need to get buy-in from decision makers and high-level stakeholders* on the aim and goals that the Learning Session team set so that we can move forward with our work plan.

Objectives

- *Stakeholders know the aim and goals that were set at the Learning Session*
- *Stakeholders understand the rationale behind the aim and goals*
- *Stakeholders have the opportunity to ask questions about the aim and goals and propose changes*
- *Stakeholders reach consensus on the aim and goals that was set or edited and are excited to champion the aim and goals in the community*

Who

Must Attend	Role/Goal
Coordinated Entry Lead	Was at LS, will help frame aim and speak to their ownership
CoC Board Chair/Executive Director	Need buy in
City or County Leadership	Need buy in
VoA Executive Director	Will be integral in clearing the path to achieve goal #1
Not This Meeting	Role/Goal
HMIS administrator	Separate meeting occurring with the data team prior to discuss data implications and gain their support.

Consider Context

- All participants have been involved in the work for some time and should be familiar with Built for Zero and what aims, goals, and drivers towards functional zero are.
- Our conversation at Learning Session shifted goal #2 from what was discussed prior to the Learning Session thus the CE Lead will take ownership of framing that goal
- This group of stakeholders will not be as involved in the day to day operations of the goals/drivers, but still have an important role as decision makers/champions of the

work in our community. Alongside updating them on the aims/goals, we need to also make clear the ways they will be needed as decision makers/path clearers moving forward

Create Our Space

- 90 minutes
- Zoom meeting (will not be recorded)
- Participants will receive a copy of the Aim/Goals two days prior to the call so they are able to prepare questions

Agenda	
Welcome and Intention Setting	<i>5 minutes</i>
Reviewing Aim and Questions	<i>15 minutes</i>
Reviewing Goals and Questions	<i>30 minutes</i>
The Role of Stakeholders moving forward <ul style="list-style-type: none">- In what ways will the Improvement Team need support from these decision makers to successfully achieve the goals- Engagement going forward	<i>30 minutes</i>
Final thoughts and next steps	<i>10 minutes</i>