How to use this resource

Housing process buckets are a handy visual method to help your team see how far clients have made it in the process and brainstorm the next action that will progress them toward housing.

This deck will help you facilitate your case conferencing meeting using process buckets so that you can identify the most important housing-focused action for each client at each meeting.

FOR EVERY MEETING: Update all counts on slide 5. Fill in names on slides 6-8.
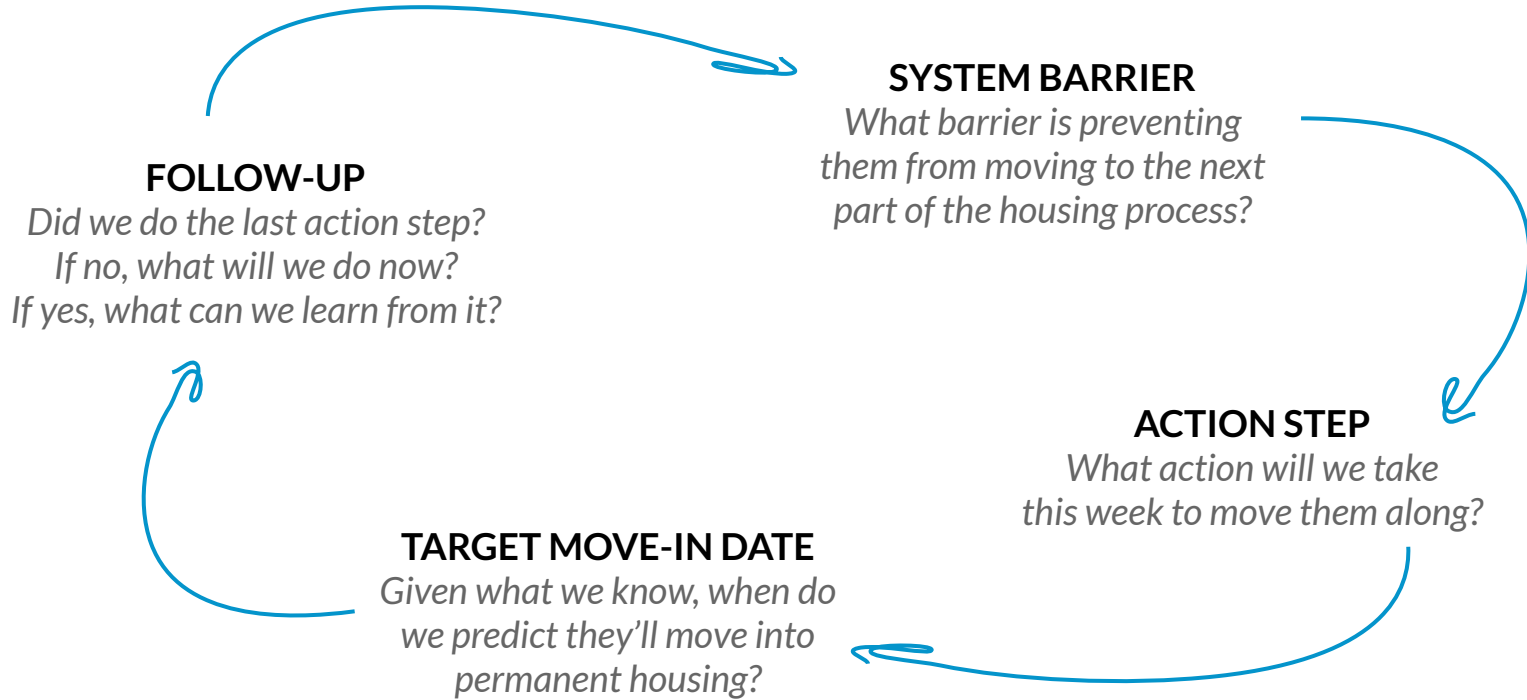
FOR YOUR FIRST USE: Introduce the concept of housing process buckets to your team. Slide 3 illustrates the questions you'll discuss for each client, no matter where they are in the housing process. Slide 4 introduces the buckets as a way to visualize your housing process. Customize the bucket labels to fit the scope and objectives of your meeting, if needed. In subsequent meetings, you can delete slides 3-4.

Case Conferencing by Process Buckets

[Your Community Name] — [Your Meeting Title or Target Population]

How we'll generate actions for each client

SYSTEM BARRIER
*What barrier is preventing
them from moving to the next
part of the housing process?*

FOLLOW-UP
*Did we do the last action step?
If no, what will we do now?
If yes, what can we learn from it?*

ACTION STEP
*What action will we take
this week to move them along?*

TARGET MOVE-IN DATE
*Given what we know, when do
we predict they'll move into
permanent housing?*

One way to look at our housing process

IDENTIFICATION

ASSESS

To advance clients to the next bucket:

❏ Complete assessment

MATCH

To advance clients to the next bucket:

❏ Match to resource, program, or housing plan

NAVIGATE

To advance clients to the next bucket:

❏ Locate housing and get moved in

MOVE IN

<Population> counts this week

IDENTIFICATION

ASSESS

To advance clients to the next bucket:

❏ Complete assessment

2 clients

MATCH

To advance clients to the next bucket:

❏ Match to resource, program, or housing plan

3 clients

NAVIGATE

To advance clients to the next bucket:

❏ Locate housing and get moved in

15 clients

MOVE IN

Functional zero threshold: 7

Clients needing assessment this week

ASSESS

- Name 1
- Name 2
- Name 3
- Name 4
- Name 5
- Name 6
- Name 7
- Name 8

What actions will we test this week to get them assessed and moved to the next bucket?

MATCH

Clients needing match this week

MATCH

What actions will we test this week to get them matched to a program, resource, or housing plan and moved to the next bucket?

- Name 1
- Name 2
- Name 3
- Name 4
- Name 5
- Name 6
- Name 7
- Name 8

NAVIGATE

Clients needing navigation this week

NAVIGATE

- Name 1
- Name 2
- Name 3
- Name 4
- Name 5
- Name 6
- Name 7
- Name 8

What actions will we test this week to help them locate housing and move in?

MOVE IN