Case Conferencing Academy

Facilitation Guide for Community Leaders and Built for Zero Improvement Advisors

Using the Case Conferencing Academy to Drive Improvement

The Case Conferencing Academy is designed as a curriculum to support communities looking to improve their case conferencing, with light-touch coaching from an improvement advisor. The modules are set up to be completed in order but can be used as stand-alone workshops that can be valuable if a specific type of support is requested. Reference the module descriptions below for content-specific guidelines.

Module 1: Getting Started (Slides and Recording)

This module is designed to explain what case conferencing is, and why it's valuable, as well as giving an overview of the Case Conferencing Changes Roadmap.

Material Referenced

- **Case Conferencing Changes Roadmap** (link)
  A set of prescriptive change ideas designed to be completed as self-facilitated PDSAs, covering the bulk of the action-oriented case conferencing framework.

Module 2: Facilitation (Slides and Recording)

This module is designed to provide an overview of the role of a facilitator as a leader, and provides guidance on 3 change ideas to test.

Material Referenced

- **Facilitate the Learning Loop Guide** (link)
  Get housing placements, not updates. Facilitate this basic flow for each client in each meeting, and you'll generate action and learning.
- **Target Move-In Dates Guide** (link)
  For each client you discuss, ask the case manager for a date by which they expect to see move-in. Add a field on your by-name list to record the date. This small question sets you up for accelerated action and system learning.
- **Facilitator's Guide to Transforming Team Culture** (link)
  Explore 5 opportunities for change: 1) generating action-oriented solutions for clients, 2) moving from "my client" to "our clients," 3) housing with urgency, 4) clarity on who's doing what, 5) managing time to leave no one behind.
- **Agenda Building Kit** (link)
  This framework will lead you through taking your grand vision for case conferencing into everyday practicality. It covers design principles, essential preparation before the meeting, and an agenda template.

Module 3: Team Alignment (Slides and Recording)

This module is designed as a companion to the facilitation module to provide concrete tools for creating structure that builds team alignment.

Material Referenced

- **Set Objectives for Your Meeting Guide** (link)
  Your meeting's main objective should be to move clients faster through the housing process. Use this tool to set your local objectives for your meeting.
- **Partner Invitation Checklist** (link)
  Use this resource to check if you have the stakeholders needed to design and execute a 360° plan for quickly and sustainably housing every homeless household in your community.
- **Jobs in Your Meeting Guide** (link)
  Recruit steady volunteers for each role, and give them training and resources to succeed. Rotate participants if desired, but ensure consistent practices.

Module 4: BNL Infrastructure (Slides and Recording)

This module is designed to help you set up your by-name-list infrastructure to drive action in your case conferencing meeting.

Material Referenced

- **By-Name List Template** (link)
  Use our fields to share an action-oriented by-name list curated for improvement and analytics.
- **Buckets Facilitation Slides** (link)
  Make the housing process visible using these slides, and find your next action step faster.

Module 5: Results & Measurement (Slides and Recording)

This module is designed to help you build strong improvement habits to keep your meeting action-oriented and covers tools to push your team to be more ambitious in setting goals.

Material Referenced

- **Case Conferencing Tally Sheet** (link)
  The Case Conferencing Tally Sheet is designed to give you an easy place to record your Learning Loop steps—a.k.a. your process measures. Recording data enables you to learn from it. Otherwise it's just evaporating numbers.
- **Target Move-In Dates Calculator** (link)
  This tool helps your case conferencing team set target move-in dates so that you can house people faster; it is not a forecasting tool. If your inflow or outflow rates change over the coming months, your actively homeless count will fluctuate.