What is Case Conferencing?

Case conferencing is a recurring, problem-solving meeting, bringing key participants together to collaborate on ways to remove barriers to help house clients faster.

Every Built for Zero community who has reduced homelessness has worked on improving and transforming their case conferencing practice, making it the “brain” of their improvement system.

Effective case conferencing coordinates providers across your system and aligns resources to ensure that you are housing folks efficiently and quickly. It helps transform the ethos of a community from focusing on “my clients” to “our clients.”

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.

What kind of case conferencing do we do?

Assessing meeting strengths, purpose, and areas of targeted focus

Does your community conduct at least one meeting per month that is:

- **Inter-agency** - i.e. it involves more than one provider, **AND**
- **Client-centered** - i.e. the purpose of the meeting is to discuss the users of your homeless response system, **AND**
- **For frontline staff** - i.e. those working directly with people experiencing homelessness are the primary participants at the meeting?

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If your answer is **no**, **you're not doing case conferencing**.

Today, find a next step that gets you started.

If your answer is **yes...**

Are you using your by-name list to generate the agenda for the meeting?

***Note**: If you ask participants to bring their most difficult cases to the meeting for discussion, and these discussions take up the bulk of the meeting, your answer should be no.*

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If your answer is **no,** you're running a **clinical case conferencing meeting**.

Today, find a next step that centers your by-name data in the meeting.

If your answer is **yes...**

Are you generating housing-related next steps for all (or most) of the clients you discuss in your case conferencing meetings?

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If your answer is **no**, you're likely running an **updates meeting.**

Today, find a next step that makes your meeting more housing focused.

If your answer is **yes...**

Do you keep people accountable to the next steps that you identify?

***Note**: If you can't identify a concrete mechanism for accountability that you currently have in place (e.g. an email, an agenda item), your answer is likely no.*

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Today, find a next step that promotes accountability for your meeting participants.

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If your answer to question 4 is **no,** you are running a ~~PDSA~~ **meeting.**

Today, find a next step that promotes accountability for your meeting participants.

If your answer is **yes,** you are running a **solid case conferencing meeting.**