



# Care Conferencing:

Examples of Person-Centered and Data Driven Service  
Coordination Approaches Towards Ending Homelessness

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# Introductions



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# Fundamentals Overview

# Fundamentals

## Facilitation

Strengthen your abilities as a facilitator in order to drive action.

## Team Alignment

Align participants in a shared purpose and shift your team culture.

## BNL Infrastructure

Optimize your BNL to collect relevant data, and increase transparency

## Results and Measurement

Collect and regularly review data to ensure your meeting is producing better outcomes for clients.

# Facilitation

## Jobs in Your Meeting

*Fill each of these roles—with different individuals!*

### It takes a village practice.

Recruit steady volunteers for  
Rotate participants if desired.

#### Facilitator

- At minimum, the facilitator leads the agenda. The large environment in which from each other's experience ensure that each individual

## Agenda Building Kit

*Design principles, preparation, and an agenda template*

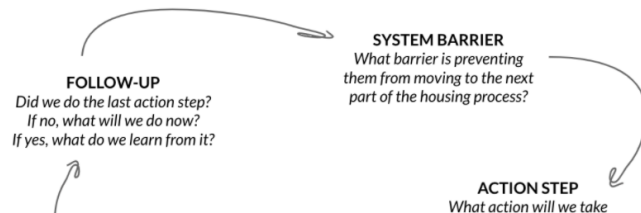
### Invest in a consistent, goal-oriented get the most out of case conferenci

This framework will lead you through taking your grand vision for case conferencing into everyday practicality. We'll cover design principles, essential preparation before the meeting, and an agenda template.

## Facilitate the Learning Loop

*Break the updates meeting, and generate actions for housing placements*

### Use this flow for each client to generate action and learning



# Team Alignment

## Set Objectives for Your Meeting

*It's a required step to create shared purpose and drive results*

**Your meeting's main objective should be to move clients faster through the housing process.**

Built for Zero observed case conferencing meetings all over the country. What did the productive ones have in common? Attendees were aligned in a clear purpose, housing clients faster.

### Set objectives for your meeting

- Form them with participants. Facilitate a conversation about the objectives once, and

## Partner Invitation Checklist

*Get people to the table who can help house clients this week*

**Each person at the case conferencing table should leave with action steps that will move clients toward housing.**

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.

### Functions of stakeholders in your meeting

- **Outreach Coordination:** When a client goes missing, or isn't brought into the housing process, it can be a significant barrier to speedily resolving their housing crisis. Community outreach staff are experts in engaging the homeless population, and are often able to leverage their relationships with other homeless household heads.

# Results and Measurement

## 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 is there an action step, with due date?	%	%	%	%
Of the clients discussed, for what percentage is there a target move-in date <i>within the next 2 months</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?				

# BNL Infrastructure

## One way to look at our housing process

## ASSESS

## MATCH

## NAVIGATE

## MOVE

To advance clients to the next bucket:

 Complete assessment

To advance  
the next

[illegible][illegible]



# Buckets Deep Dive

# The Secret Ingredient

## RECIPE

*Title* **Success**

*Serves* **People experiencing homelessness better**

..... *Ingredients* .....

**It** **Cross-Agency COLLABORATION**

# How Team Roles Help

Clarity is kindness.

Team roles provide clarity to everyone at the table on what the expectations are for participation.

# Building a Collaborative Team Culture

## **Divide the labor:**

Can one staff person perform a task for multiple clients? Can you root out duplication of services?

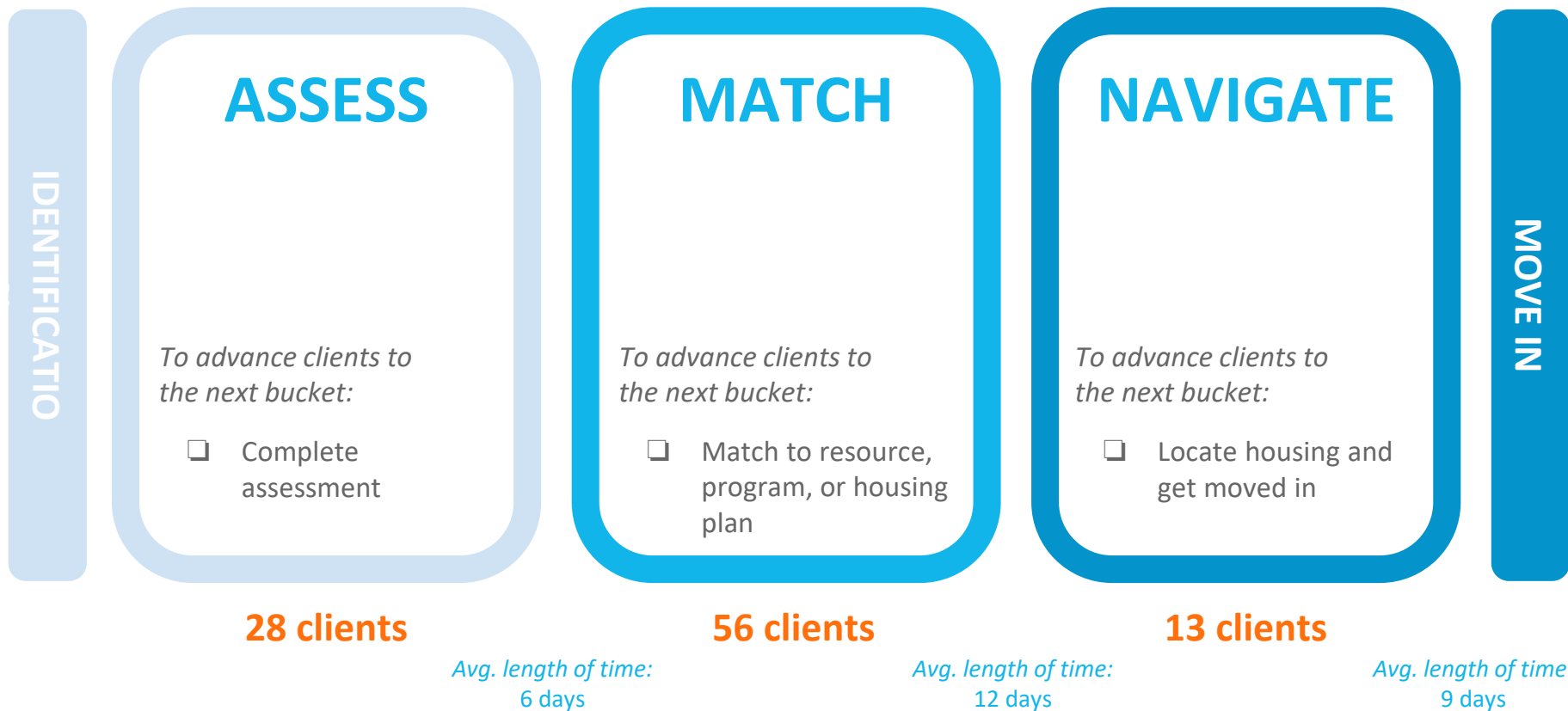
## **Clarify each person's role:**

Which jobs do they regularly touch? Which actions are they responsible for?

## **Manage time:**

Break up your meeting agenda by type of job. Who needs to be present for this part of the conversation?

# Visualizing Roles With Buckets



# What Buckets Get You

Shape your by-name list into buckets and instantly realize two benefits:

- Reveal the next action needed to move each client forward
- If you structure your agenda and the clients you discuss around buckets, you can move forward clients from every stage of your housing process

# Buckets May Have Action Steps

## ASSESS

- ☐ Engage
- ☐ Connect to services
- ☐ Build relationships btw. staff and client
- ☐ Complete housing needs assessment
- ☐ Prioritize

## MATCH

- ☐ Collect vital docs
- ☐ Continue MH/DA treatment
- ☐ Connect to employment or SSI/SSDI benefits
- ☐ Apply for PHA assistance

## NAVIGATE

- ☐ Identify unit
- ☐ Identify roommate
- ☐ Apply for furniture voucher
- ☐ Apply for deposit assistance

MOVE IN

Down here are the decisive steps to move forward

- ☐ Complete assessment

- ☐ Match to resource, pgrm, or housing plan

- ☐ Locate housing and move in

# Make Buckets Visible In Your Meeting

Add two fields to your BNL and update them at every meeting:

- Process Bucket
- Date Status Changed (Gives you avg. LoT!)

*Check! You may already have fields you can use to pull process buckets*

**Case Conferencing Tool Bank: BNL Template**

File Edit View Insert Format Data Tools Add-ons Help Last edit was made 3 minutes ago by Emma Beers

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	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>Identification</b>				<b>Housing Status</b>			<b>Prioritization</b>		<b>Housing Process Buckets</b>		<b>Learn</b>	
2	<b>HMIS ID</b>	<b>First Name</b>	<b>Last Name</b>	<b>Last four of SS</b>	<b>Housing Status</b>	<b>Length of Time on BNL</b>	<b>Date BNL Status Updated</b>	<b>Assessment Score</b>	<b>Date of Last Contact</b>	<b>Process Bucket</b>	<b>Data Status Changed</b>	<b>Current Barrier</b>	<b>This Week's Action Step</b>
3													
4													
5													

*Want this resource? Case Conferencing Tool Bank: BNL Template*

Want this resource?

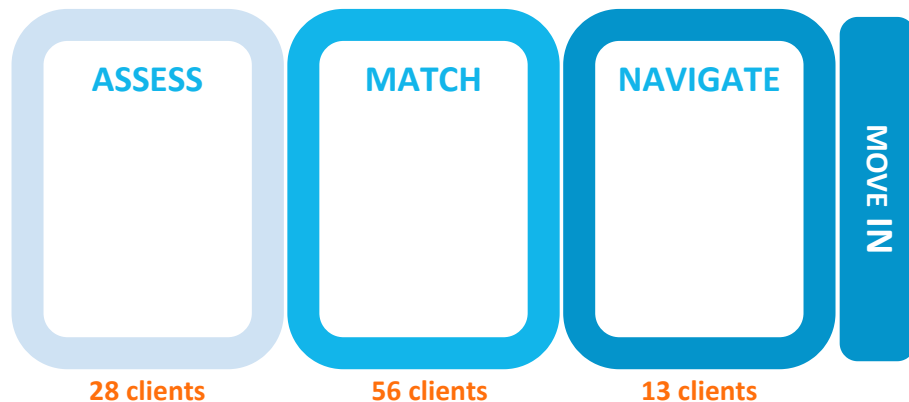
## Case Conferencing Tool Bank: BNL Template



# Find Bottlenecks In Your Counts

## Number of clients per bucket:

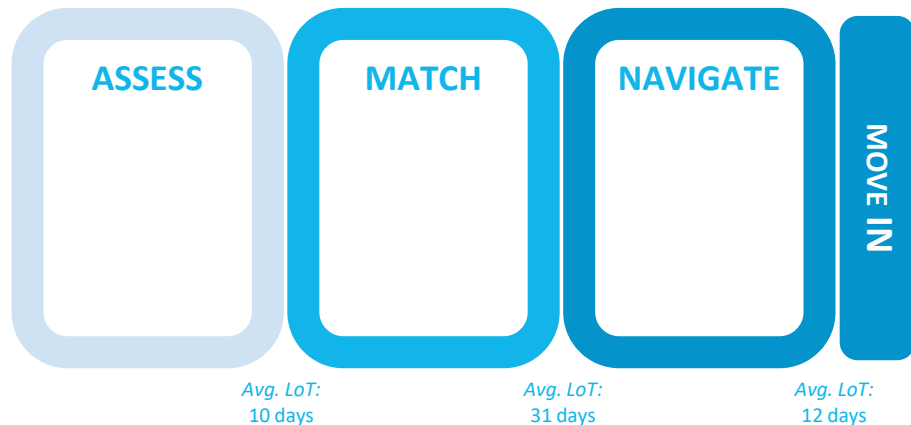
- Which bucket has the most clients?  
There may be a bottleneck. Assess what's causing the process problem and begin coproducing improvements.
- Which bucket has the least clients?  
Could be a bright spot. Learn from what's going well. (Or check if you're missing clients!)



# Find Bottlenecks in LoT

## Avg. length of time (LoT) per bucket:

- Which bucket is moving slowest? Map your process to understand why it's moving slowly, set a target LoT, and begin testing ideas until the time comes down.
- Which bucket is moving fastest? This part of the process is working well, so protect it and celebrate it.
- What's the average time from entering the system to being housed? If it's over 100 days, work hard to bring it under 100 ASAP. BFZ's target time is 30 days.

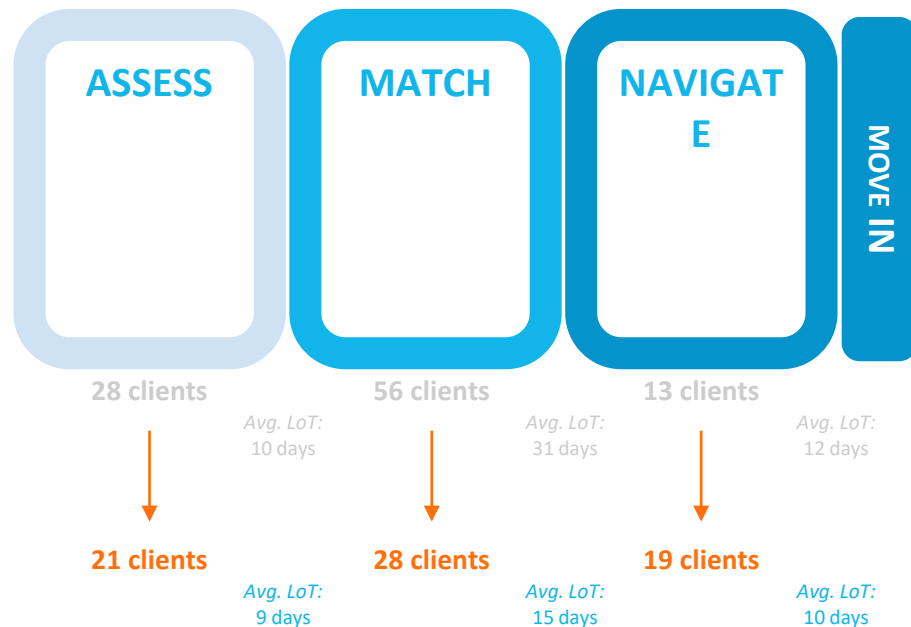


- Look for variation across individual programs or staff. Find people to celebrate and spots to improve.

# ...And Clear Them

Differentiate between problems you can solve *inside* case conferencing and problems for which you'll need *outside* help

- Marital your data: **"We could house clients faster if you help us solve \_\_\_\_, and we know it because we are seeing \_\_\_\_"**
- Is the problem under the control of someone in this meeting? Great! If not, look for ways to influence it
- When repeated tests don't improve the issue, it's likely time to look outside



# Make It The New Way You Work

**Introduce the concept** to your team to help them understand its value to clients and staff

**Brainstorm change ideas as a team** to develop shared notions of how to move clients forward to the next bucket

**Track as a team your length of time** and build competitive spirit to beat your own times

**Q&A**

# Case Conferencing Tool Bank

**Built For Zero.**  
COMMUNITY SOLUTIONS

MY COMMUNITY



Download Case Conferencing Summit materials [here](#)

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## Become a Power Facilitator

### Facilitate the Learning Loop

[Download](#) | [View on Google Drive](#)

Get housing placements, not updates. Facilitate this basic flow for each client in each meeting, and you'll generate action and learning.

### Facilitator's Guide to Transforming Team Culture

[Download](#) | [View on Google Drive](#)

Case conferencing is an opportunity to transform how your team thinks and acts.

### Agenda Building Kit

[Download](#) | [View on Google Drive](#)

Invest in a consistent, goal-oriented agenda to get the most out of case conferencing.