

Align Participants with Shared Purpose of Action-Oriented Case Conferencing



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Introductions



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Why are we here?

We observed that case conferencing is frequently a *missed opportunity*...

Why are we here?

We observed that case conferencing is frequently a *missed opportunity*...

Some communities figured out how to make it their immediate path to Zero 🔥

Why are we here?

**We're here to
share with you**

How they did it..

**& How to make it
work for your
community**

Introduction

Agenda

Introduction



Build the Team



Introduction

Build the Team

Shared Purpose

Facilitate for Action



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Build the Team

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You'll leave
with
actionable
ideas and a
vision.



Let's get to it!

About that case conferencing meeting...

How do we change it?



A team of water skiers performing a pyramid formation on a lake. The team is pulled by a boat, with one skier at the bottom holding onto the tow rope. Above him are four skiers forming a horizontal row, each holding onto the shoulders of the person in front of them. This pattern repeats three more times, with a single skier at the very top of the pyramid. All skiers are wearing red life jackets and black shorts. The background shows a forested shoreline and a body of water.

Build the Team!

Build your objectives

Define success



FRAMING THE LANDSCAPE

Framing is
Everything!

Connect system-wide goals to Case Conferencing

Make Big Goals Real and Tangible

Make small goals along the road to FZ

How many people do we need to house per month to reach FZ? Who are they?

Start with your goal report @ every meeting!

Document your progress & your process!

"I BELIEVE NO HUMAN IS LIMITED" - ELIUD KIPCHOGE

0 1:59:40.2

FINISH

IN

Win your wins! 🎉🎉🎉



@eliudkipchoge

Introducing.. Case Conferencing Ninjas



Emma Beers
Chattanooga



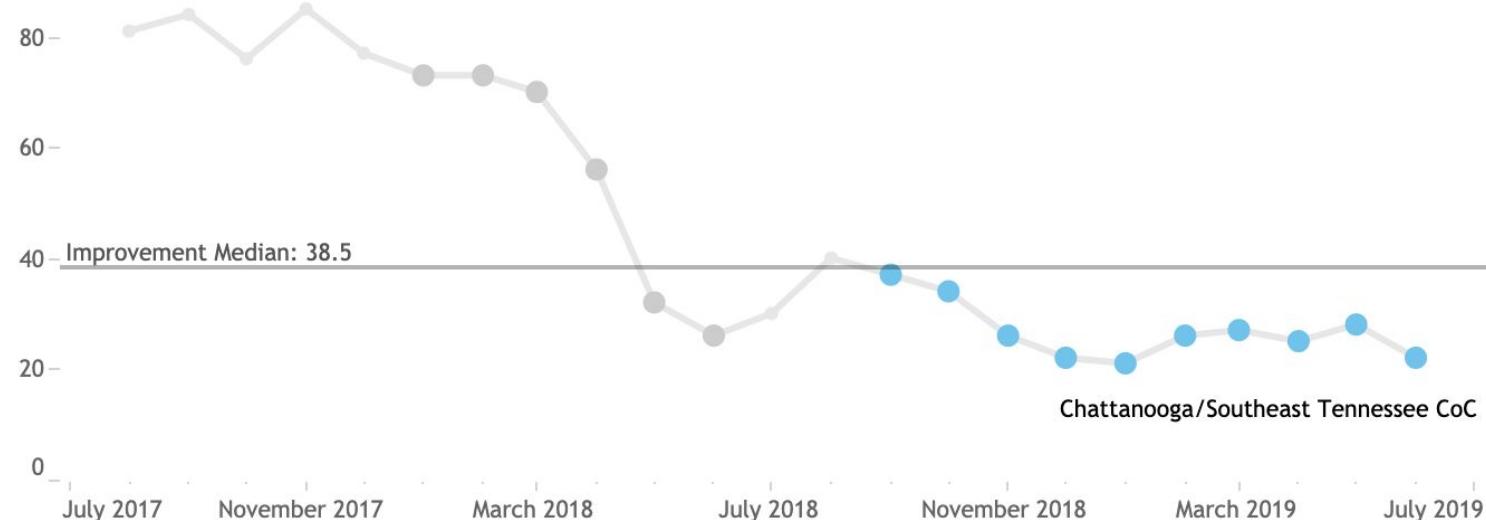
Erin Mangano
Cook County



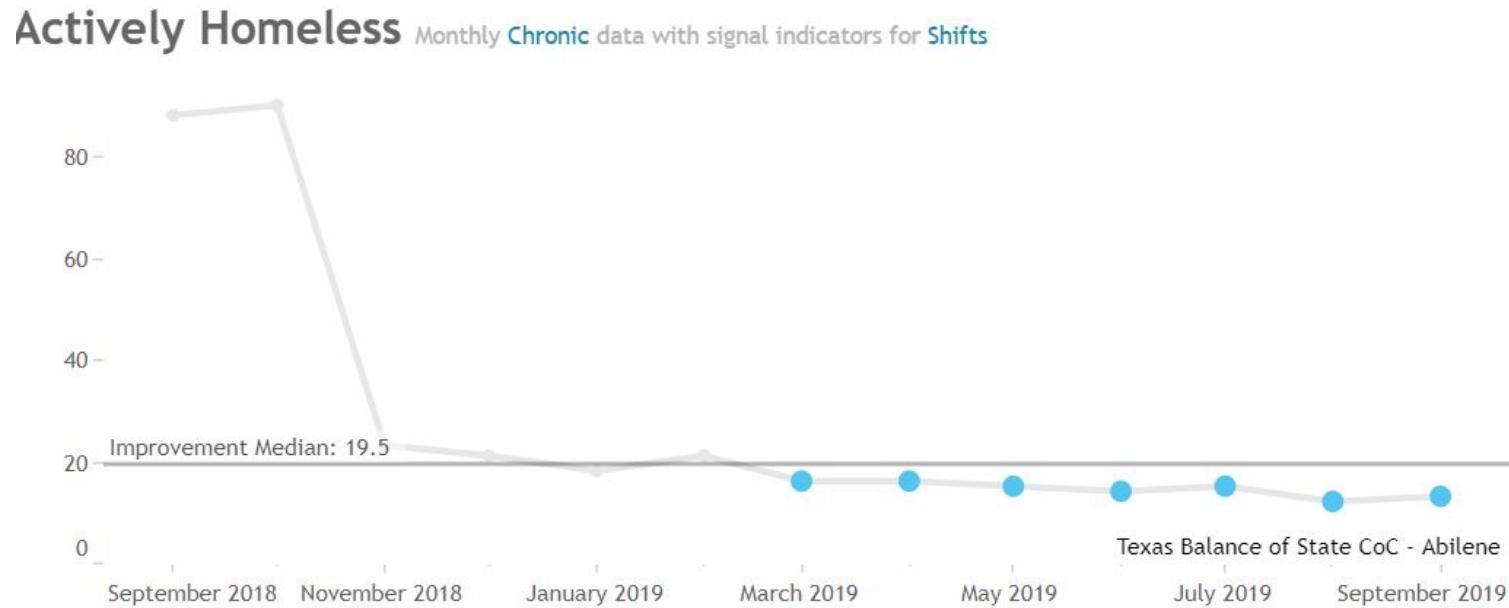
Alexzandra Hust
Abilene

*Chattanooga made their case conf.
action-oriented*

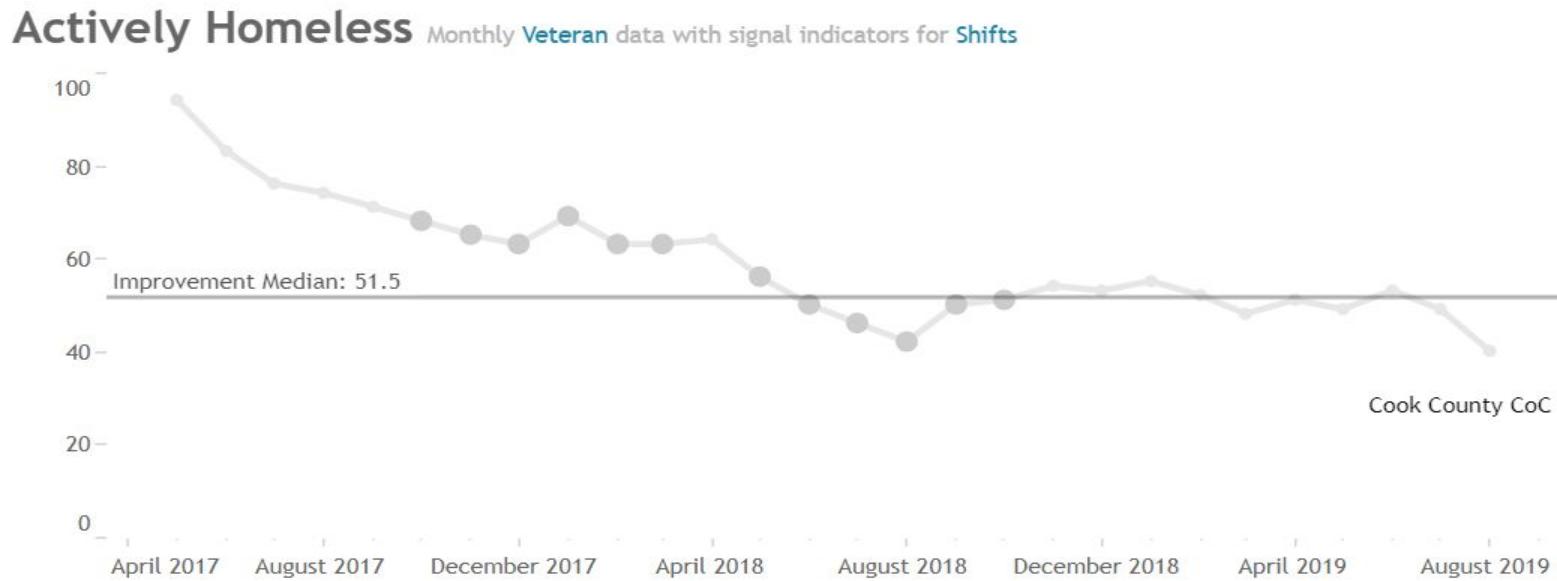
Actively Homeless Monthly Veteran data with signal indicators for Shifts



Abilene made their case conf. action-oriented



*Cook County made their case conf.
action-oriented*



For the next 10 minutes::

Pick two or three next steps that you can take to Build the team, Set objectives for your meeting, and connect system-wide goals to case conferencing.

When will you take these steps?

Put it on your calendar!

Facilitate For Action



**We heard you say case
conferencing is a meeting
where not much gets done**

**The focus is updates,
problems, or
brainstorming that's not
actionable**

A photograph of an astronaut in a white spacesuit floating in the void of space. The background is a deep purple with numerous small, glowing blue and white stars. The astronaut's suit has a large circular patch on the left arm. They are positioned diagonally, with their head towards the top-left and their feet towards the bottom-right.

**With some
action-orientation, it can
become the thing that
makes you house clients
astronomically faster**

**Simple changes that
move the needle...**



Meet frequently

BNL Housekeeping

Make your list visible and shareable: people engage with what they can see

Add fields that push towards action (& remove redundant ones)

Ask someone who is not the facilitator take notes

FIELDS FOR ACTION

Client Basic Info	Status	This Week's Barrier	Next Step	Who	By When	Target Move-In Date 
Name, HMIS ID, DOB	<ul style="list-style-type: none">• In outreach• Enrolled• Vouchered• Housing Navigation	What is the next obstacle to overcome in the system to get them housed?	What is one thing we can do to get them to move past this obstacle?	Who will do it?	Who is committing?	If we challenge ourselves to house this client as fast as possible, how soon can it happen?

Wait, Target move-in dates? 🔥

- Ask this question: **If we push to house this client as soon as possible, what's a target housing date we can predict for them?**
- It's a prediction: it helps you get more ambitious!
- It's a self-challenging tool
- It creates commitment and ownership

Explain the rationale to your team to get their buy-in

Stay Laser Focused



Avoid
discussing too
many clients
in one
meeting

Try this basic facilitation flow:

State the client's name and the previous "next step"

Ask what action has been taken to house the client since then

Define the largest obstacle the client is facing this week

Record a new next step to move them closer to housing

Record or edit the target move-in date

Plan for each client

Facilitating for behavior change

Challenges to Expect

1. **Problem-saturated thinking** - Discussing everything wrong with the client with no solutions
2. **Provider territoriality** - “My client” v. “Our client”
3. **Unmotivated thinking**, a.k.a Status quo thinking - Setting next steps too far out

Challenges v. Strategies

**Problem-Saturated
Thinking**

**Facilitate For
Problem Solving**

**Provider
Territoriality**

**Facilitate For
Teamwork**

**Unmotivated
Thinking**

**Facilitate For
Urgency**

Facilitate For Problem Solving

V. Problem Saturated narratives

Ask solution-focused questions:

“What is one thing we haven’t tried yet that we can try this week?”

“What’s one action step we can take to get them to reach their next milestone?

Listen for change talk and reflect it

“I’m hearing you say this client is experiencing a lot of challenges. I also heard an opportunity there to try X.”

Facilitate For Teamwork

V. Provider Territoriality

Once you figure out together what the client needs next, pull in other team members to help

Example: Client A has a voucher ready but would like to live in South County, where the provider agency doesn't usually work. Suggest that a South County agency help with housing navigation and record the commitment under "next steps".

Facilitate For Urgency

V. Unmotivated Thinking

Always use the operative question, “How do we get this next step to happen faster?”

Target move-in dates are a catalytic tool for this!

Listen for redundant steps, suggest consolidating them. Ex: “I wonder if it would make sense to combine this client’s intake and enrollment appointments”

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Chattanooga



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Cook County



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Abilene

Challenges v. Strategies

On your handout, you'll see a common scenario that frequently happens in case conferencing..

Problem-Saturated Thinking	Facilitate For Problem Solving
Provider Territoriality	Facilitate For Teamwork
Unmotivated Thinking	Facilitate For Urgency

With your table, think about:

What is the challenge here and what signified it to you?

What are some clarifying questions you might ask?

What are some facilitation strategies and questions you might use?

Share out + Q&A

**Remember: We're changing processes,
but what we're really shifting is human
behavior..**

- ★ Don't be discouraged, habits take time to form
- ★ Use co-creation language
- ★ Pace & lead

How do you know the changes you made are working?

- ★ Number of next steps
- ★ Number of target housing dates
- ★ Increase in housing placements
- ★ Decrease in actively homeless number

You don't have to be the facilitator



You can be a case conferencing ninja, too.

Thank You!

Feedback

Session: “Breakout - Align Participants with the Shared Purpose of Case Conferencing”

Survey Link:

<http://bit.ly/bfzrapid>

