

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 most 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 consider revisiting the objectives periodically to make sure that, as a team, you are accomplishing them.
- BFZ believes that the main objective of your meeting should be to house people faster.
- Recommended secondary objectives: Share resources, build our coalition's collaboration so that we move from "my client" to "our clients," etc. There's wiggle room with secondary objectives, but don't let them compete with #1!
- Keep it to 2 objectives if you can; it's nearly impossible for a meeting to accomplish 3-4 things!
- Each meeting should have its own written, agreed-upon objectives.

Facilitation ideas to lead your team through setting objectives

- **Expand the team's vision:** Prepare participants by leading a brief conversation about how case conferencing could provide more value to your team *and* your clients. Ask what currently works well. Present a few new ideas to expand the group's imagination. Illustrate the outcome of making a change—how it would make someone's job easier or house someone faster. Steal ideas from BFZ's Case Conferencing Tool Bank! Once your team glimpses the benefit to changing case conferencing, they'll be more game to try changes.
- **Start one meeting by facilitating a 15-minute conversation about setting objectives for your meeting:** Ask each participant to share one value they receive (or

would like to receive) from case conferencing. What results do they want to see? Synthesize answers, including yours, into a handful of objectives that can be written, shared, and committed to.

- **Set objectives for each meeting:** If you run multiple case conferencing-style meetings, define a set of objectives for each one. They may differ based on the meeting's purpose and how seasoned the coalition is.
- **Define un-success:** Ask the room to describe a bad meeting, and record their responses on a white board or flipchart. Now ask what actions you can take as a group to avoid each outcome. Agree as a team to take these actions. As a team, periodically review the commitments to monitor your progress in making it a useful, engaging meeting.
- **Loop in your BFZ coach:** Once your team sets case conferencing objectives, send them to your BFZ coach to open the conversation about optimizing your practice.

Once you set objectives, align the team behind them

- Keep your meeting's objectives some place where people can see them! Consider adding them to the recurring calendar invitation or at the top of the agenda. Keeping them in sight reminds the team of your shared purpose.
- Introduce the objectives to newcomers who join your meeting.
- Setup a way to measure if your meeting is accomplishing the objectives; consider using [BFZ's Measurement Worksheet](#).
- Periodically ask for feedback from attendees: Is this meeting accomplishing the objectives? What could we do in this meeting that would help our coalition house people faster?