BNL/CA
Case Conferencing

CAEH19 – November 5, 2019

BUILT FOR ZERO. CANADA

Ending Homelessness in Canada

The Canadian Alliance to End Homelessness

The CAEH leads a national movement of individuals, organizations and communities working together to end homelessness in Canada.

caeh.ca

National Conference on Ending Homelessness

Join us in Edmonton for the 2019 National Conference on Ending Homelessness.

conference.caeh.ca

Built for Zero Canada

An ambitious national change effort helping a core group of leading communities end chronic homelessness - a first step on the path to eliminating all homelessness in Canada.

bfzcanada.ca

Training & Technical Assistance

Helping communities and organizations end homelessness with expert training and technical assistance.

training.caeh.ca

Allied Networks

The CAEH supports several allied networks working toward our shared mission of ending homelessness.

caeh.ca

CAEH19 BNL/CA Conference Stream

Session Title	Presenter(s)	Date & Time	Audience
1. By-Name List & Coordinated Access 101	CAEH Staff	Mon, Nov 2 10:30-Noon	Beginning
2. Building Will and Leading Change in Coordinated Access	CAEH, Saint John, Peterborough	Mon, Nov 2 2-3:30pm	Beginning
3. Beyond Implementation of Coordinated Access: Using Data for Continuous Improvement in Large Urban Centres	Edmonton, Toronto	Mon, Nov 2 2-3:30pm	Advanced
4. Access and Assessment	OrgCode	Mon, Nov 2 4:00-5:30pm	Beg & Adv
5. Prioritization, Matching and Referral	OrgCode	Tues, Nov 3 10-11:30am	Beg & Adv
6. Driving Reductions and Reaching Functional Zero	Medicine Hat, Guelph-Wellington, Kawartha-Haliburton	Tues, Nov 3 10-11:30am	Advanced
7. Case Conferencing as Part of CA	CAEH Staff	Tues, Nov 3 1:30-3pm	Advanced
8. Leveraging HIFIS 4 in the Quest for Functional Zero: A Rural Communities Experience	Chatham-Kent	Tues, Nov 3 3:30-5pm	Beg & Adv
9. Common Assessment Tools Café	Variety	Wed Nov 4 10-11:30am	Beg & Adv
10.Safe, Inclusive and Culturally Appropriate CA	Peterborough, Stratford, +	Wed Nov 4 10-11:30am	Beg & Adv

Why Are We Here?

- Our partners, Community Solutions – US Built for Zero, observed that case conferencing is frequently a missed opportunity.
- Some communities figured out how to make it their immediate path to zero.
- We're here to share some of those learnings with you.

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Agenda

- Welcome & Case Conferencing Simulator Introduction (10 min)
- Overview of Case Conferencing Practices/Resources (20 min)

Build the Team → Shared Purpose → Facilitate for Action

- Case Conferencing Simulator (20 min)

Leave with actionable ideas for moving forward

- Debrief, Overcoming Challenges, and Next Steps (40 min)

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Call for Volunteers

We need 7 volunteers

Case Conferencing Simulator Introduction

You are all members of a Community Case Conferencing Team working to connect people on your By-Name List/Priority List to housing resources.

You have a CHARACTER SHEET that describe:

- Who you are
- What resources you have at your disposal and what abilities or special powers each resource has

Case Conferencing Simulator Introduction

You are all members of a Community Case Conferencing Team working to connect the highest priority people on your BNL to housing resources.

- Conference Facilitator/Lead Agency
- Community Outreach/Lead Agency
- Men's Emergency Shelter
- Women's Emergency Shelter
- Housing Resource Centre
- Housing First Program
- Canadian Legion
- Canadian Mental Health Association

Note: Simulation based on all proper consents being in place for agencies around the table.

Case Conferencing Simulator Introduction

3
CLIENTS

20
MINUTES

Community Case Conferencing

What Is It? Why Do It?

Community Case Conferencing

- Successful coordinated access systems are supported by consistent, action-oriented community case conferencing meetings.
- A regular meeting that allows for support coordination and problem-solving to occur with community partners who are serving people experiencing homelessness in your community.

Case Conferencing Allows Your Community To…

1. Ensure **holistic, coordinated, and integrated** assistance across providers for people experiencing homelessness in your community.

2. **Review progress and barriers** related to each person’s housing goal.

3. **Identify and track systemic barriers** and strategize solutions across multiple providers.

4. **Clarify roles** and responsibilities and **reduce duplication** of services.

5. Support community goals to **reduce and end homelessness** in your community

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Community Case Conferencing

How To Do It?

Step 1: Build the Team

- What makes a case conferencing DREAM TEAM?
  - People who know the majority of your By-Name priority list and can take the next steps to house them
  - Critical mass of providers – not perfection (70% +)
  - Keep it to who's essential

Build the Team!

Tips for the Team

- Organizations should have at least one person assigned to participate consistently in each case conferencing meeting.
- This person is expected to be the bridge of communication and have decision-making authority regarding the resources available from their agency.
- This person is expected to come prepared to each case conference meeting with the most current information on the person allowable to share.

Step 2: Develop Shared Purpose

1. Build your objectives
2. Define success (and unsuccess)

Document it

(develop a terms of reference)

&

Share it!

Shared Purpose

More On Defining Success

- Connect system-wide goals to case conferencing
- Make big goals real and tangible
- Make small goals along the way
  - How many people do we need to house per month to reach functional zero?
- Start with your goal report @ every meeting
- Be sure to document your progress and your process!

Shared Purpose

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We have heard…

- Case conferencing is a meeting where not much gets done.

- The focus is on updates, problems, or brainstorming that is not actionable.

With some action orientation…

It can help house people astronomically faster!

Step 3: Facilitate for Action

Some Simple Items That Can Move the Needle:

- Select a strong, action-oriented facilitator
- Meet frequently
- By-Name List/Priority List
  - Make it shareable with group
  - Add action fields
- Have someone take notes and be a time-keeper – ideally not the facilitator

Facilitate for Action

Tips for Management & Facilitation

- Facilitators should ideally be able to keep the group on task while guiding solution-based and housing-focused discussions.
- Make sure someone has the Big Red Ball with each person. If need to clarify roles consider RACI (responsible, accountable, consult, inform)
- Follow-up – send action items after the meeting and have process to keep up-dated between meetings as necessary
- Foster the group dynamic by asking for feedback. Have a once a month evaluation – if there is a need to change process or procedure, discuss at monthly admin meeting.

Meeting – Original - Good

Sample Meeting Agenda

1. Introductions and review agenda/purpose (5 min)
2. Quick follow-up from last meeting (10 min)
3. **New Reviews (5 to 8 mins each)**
   - **Set Up - why brought forward (intro by facilitator)**
   - **Information Gathering – can include the following:**
     - Current status
     - Critical Housing, Service and Safety Round Table:
       - **Person's Strengths/Assets**
       - **Person's Barriers**
       - **Person's Preferences**
   - **Problem Solving and Action Planning** - what can be offered/actioned and next steps
4. Wrap-up and next meeting (5 min)

- One-hour weekly meetings – virtual and/or in-person
- Should be able to cover 5-7 clients in a one-hour meeting – decided on ahead of time so people can come prepared.
- Some communities make one meeting a month to cover admin/process items.

Meeting – New - Better

Sample Meeting Agenda

1. Introductions and review agenda/purpose/**goals and progress** (5 min)

2. **Review each person for 2-3 minutes**

- State clients name and 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 the next step to move them closer to housing
- Record or edit the target move in date

3. Wrap-up and next meeting (5 min)

Should be able to cover 10-15 clients in a one-hour meeting

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Fields For Action 🔥

Client Basic Info	Progress Status to Housing	This Week's Barrier	Next Step	Who	By When	Target Move-In Date
Name, HMIS ID, DOB	• Awaiting Match • Matched • Accepted Referral • 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?

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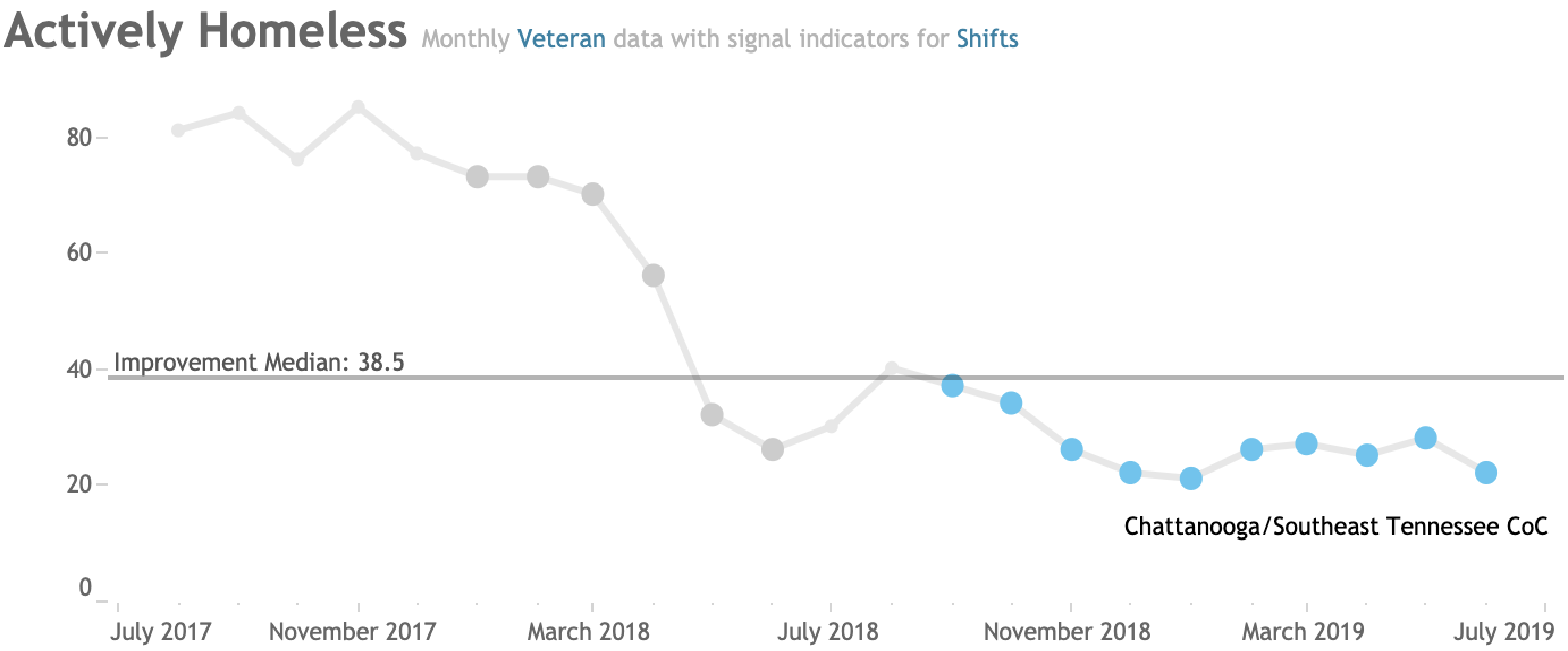
Ask This Question…

If we push to house this client as quickly as possible, what target date can we predict for them?

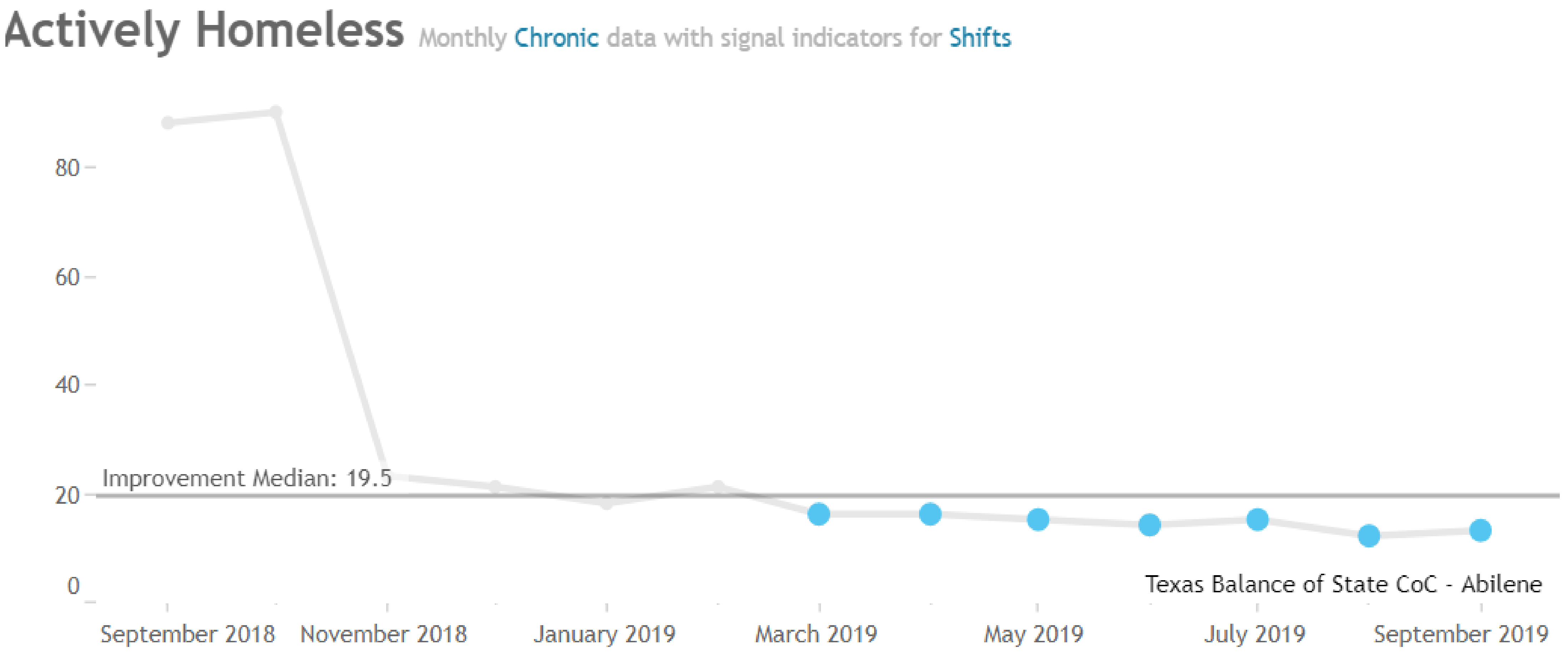
- It's a prediction – it helps you get more ambitious
- It's a self-challenging tool
- It creates commitment and ownership

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

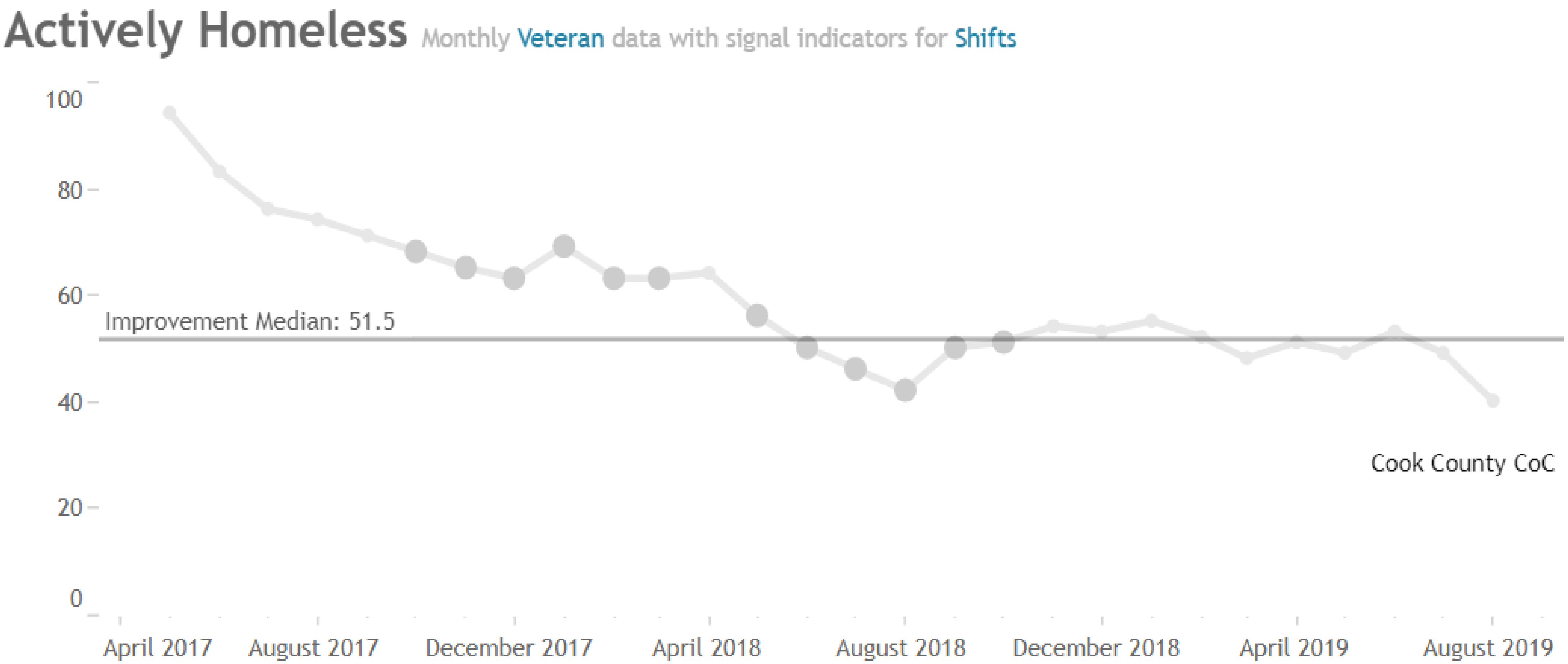
Chattanooga made their case conferencing action-oriented



Abilene made their case conferencing action-oriented



Cook County made their case conferencing action-oriented



Resources

- BFZ-C Case Conferencing Overview and Examples (BFZ-C website under Coordinated Access)
  - Provides tips and tricks and sample Case Conferencing agendas
  - More resources coming soon!
- Making Zero Count: Support Coordination Resources Handbook
  - Provides downloadable templates and other resources to facilitate greater coordination when multiple frontline workers from different agencies are working with a single person. Templates include a sample agenda, consent form and a service coordination agreement.

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Case Conferencing Simulation

Case Conferencing Simulator Introduction

The Case Conference Facilitator will take the team though the three review phases for each person discussed today.

1. **Setup** – Learning about who the person is and why we are reviewing them today.
2. **Information Gathering** – Reviewing Files from all attendees to see if there is any new information to share on the person.
3. **Problem Solving and Action Planning** – Reviewing available Resources and Abilities to develop an Action Plan.

Questions to Answer During Each Review

1. What strengths/assets does the person have to assist in getting them housed?
2. What barriers are preventing this person from getting housed?
3. Who has information that can help us better understand the strengths and barriers?
4. Who has resources to build on the strengths/address the barriers?
5. What are the next steps after this meeting?
6. Who’s taking the lead with this person?

Use Your Team

Ask questions.

Talk it through.

Use Your Team

READY

SET

BEGIN!

Person #1 - Jane

Jane is a 48-year-old female who is experiencing chronic homelessness. She has mental health issues and has been matched to a CMHA Housing Allowance. She was requested to be reviewed today by CMHA.

Person #2 - John

John is a 20-year-old male who has been staying at the Men's Emergency Shelter for the past 7 months. He was requested to be reviewed by the Men's Emergency Shelter.

Person #3 - Charlie

Charlie is a 65-year-old, chronically homeless, male Veteran. He is not currently enrolled in any program or service. The Coordinated Access/Case Conferencing Lead Agency has requested that he be reviewed today as he has been on the By-Name List for six months now with no progress.

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Debrief

What are your burning observations and questions?

Common Challenges and How to Overcome Them

Challenges	Ideas to Overcome
Problem-saturated thinking – discussing everything wrong with no solutions	**Facilitate for problem-solving.** Ask problem-solving 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.”
Provider territoriality – “my client” vs. “our client”	**Facilitate for team-work.** Once you figure out together what the client needs next, pull in other team members to help. For example: “It looks like the person signed a lease last month but is still staying in a shelter. Is there anything this group can do to help expedite move-in?”
Unmotivated thinking – status quo or setting next steps too far out	**Facilitate for urgency.** 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. E.g., “I wonder if it would make sense to combine this client’s intake and enrollment appointments”

Common Challenges and How to Overcome Them

Challenges	Ideas to Overcome
Spin-off conversations	**Facilitate for focus.** If this is the only time agencies are talking - encourage them to meet before or after the meeting. If meeting in-person, facilitator can book the room for extra time to support this. If system issues are arising – have a parking lot that can revisit at another meeting or at the monthly admin meeting. If getting off track - have an agreed upon way to bring people back to the agenda.
Story-telling	**Facilitate for focus.** When establishing your meetings or at an administration meeting, have your group brainstorm information that is helpful/appropriate to share and information that is not helpful/appropriate to share. o Remind people of the time constraints and importance of getting to everyone on the agenda. o If getting off track - have an agreed upon way to bring people back to quick information about strengths, challenges, resources and actions.
Blame-gamers	**Facilitate for focus.** Make clear in the terms of reference that the purpose of the meeting is not to place blame but to move forward with next steps. If getting off track - have an agreed upon way to bring people back to action.

Common Challenges and How to Overcome Them

Challenges	Ideas to Overcome
Members don’t show up or don’t come prepared	**Facilitate for engagement.** Ask them what is making it difficult for them to attend/come prepared. Ensure support is in place from leadership to have them involved. Ensure they are the right person. See if they can have a back-up person. Outline expectations for meeting members in terms of reference. Talk with them individually about the impact to clients when they don’t show. Have you answered WIFIM (What’s In It For Me)?
Becomes about staff or agency challenges	**Facilitate for client centeredness.** Ask questions that invite team members to speak specifically about the client, quote the client, or adopt the client’s point of view. Ask follow-up questions that cause the room to calculate the impact of a decision on the client; it is always the right time to ask, How will this affect the client?
Group has tried everything – no more options	**Facilitate for problem-solving.** Is there anything to keep moving towards housing? Solo brainstorming. Bring in fresh eyes. Ask the person. Document system barriers.
Other?	

Don’t Get Discouraged

- Remember – we are changing processes – but what we are really doing is changing human behavior – new habits take time to form

- Use co-creation language:
  - Make suggestions
  - Reflect what you see rather than make judgements
  - Ask curious open-ended questions

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You can be a case conferencing ninja.

Thank You

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