

Case Conferencing Overview

See Appendixes A & B for further information and sample agendas.

What Case Conferencing Is

- Case Conferencing is a routine, centralized process that helps community leaders and housing navigators monitor and advance the progress of various people toward housing.
- A regular meeting (e.g. weekly, bi-weekly) that allows for support coordination and problem-solving to occur with all community partners who are serving people experiencing homelessness in that community.

What Case Conferencing Is Not

- A meeting for doing general updates to the BNL.
- A meeting for everyone on your By-Name List/Coordinated Access List – it is meant to be focused on getting those who are stuck, to become unstuck.
- A meeting to match people to housing resources [wherever possible, this should be done real-time and based on pre-determined priorities and enough information about services to match without having a case conference meeting] unless someone is getting stuck - at which point it makes sense to bring to case conferencing table.
- A time to discuss the same “difficult clients” over and over.
- A time to debate the accuracy of the data being used.

Case Conferencing Tips and Tricks

- In a one-hour meeting, you should be able to review 5-8 people (at approx. 5-8 min each).
- Your group should have a terms of reference and/or policies and procedures. See samples for further information.
- Roles needed include facilitator, timekeeper and note taker. Ideally this is not all the same person. Chose the right facilitator – facilitation skills, right energy, general familiarity with services, helps group stay on track and come to decisions, solution-focused/action oriented.
- 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 housing options. This person is expected to come prepared to each case conference meeting with the most current client information allowable to share and/or it's a quick phone call away.

- Consider how you will orient and train people for your Case Conferencing table – e.g., [Situation Table free on-line training](#) (from WLU Centre for Public Safety and Well-Being).
- Meet weekly. Once your group is up and running and familiar with the process and one another, you may consider meeting virtually (e.g. once a month in person – perhaps to handle administrative items and meet virtually for the other weeks).
- Send agenda out in advance with who is being reviewed ahead of time so that people can come prepared with information from their agency.
- Only share the critical details of barriers, strengths and solutions. Do not get into storytelling and sharing unnecessary details.
- There is likely more than one solution. Keep it housing-focused and housing first aligned.
- Consider not only available resources but also who has the strongest rapport. Is there an opportunity to utilize peers?
- Ensure next steps and people’s roles are clear. Consider using RACI (Responsible, Accountable, Consulted and Informed) as a helpful tool in identifying roles and responsibilities when supporting a person as a team or across multiple systems and agencies. Refer to links below for additional information:
 - [Understanding Responsibility Assignment Matrix \(RACI Matrix\)](#)
 - [RACI 101 Video](#) (5 min)
- Send out action items immediately following the meeting, so everyone knows who is responsible for what.
- Have processes in place to keep people updated between meetings as needed.
- Have a once a month evaluation – discuss at monthly admin meeting how to make improvements to the meetings.

Use a 3 Phased Framework for Your Meeting

- **Phase #1 – Set-up Phase**
 - Identify who reviewing for this meeting and why - with all necessary privacy addressed beforehand.
 - Review one at a time. Mix up who you start with so everyone at the table gets a chance for someone they are working with to go first.
- **Phase #2 – Information Gathering**
 - Each person around the table shares what information they have available including strengths and barriers.
 - Facilitator summarizes and confirms the strengths and barriers with the group.

- **Phase #3 – Problem-Solving and Action Planning**
 - Identify available resources and develop an action plan.
 - Identify a lead.

Ideas to Address Challenges

- Spin off conversations:
 - If this is the only time agencies are getting to talk - 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.

- Storytellers:
 - 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.
 - Remind people of the time constraints and importance of getting to everyone on the agenda.
 - If getting off track - have an agreed upon way to bring people back to quick information about strengths, challenges, resources and actions.

- Blame Gamers:
 - Make clear in terms of reference that purpose of 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.

- People don't show up or don't come prepared:
 - 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 the individually about the impact to clients when they don't show.
 - Have you answered the WIFIM (What's In It For Me)?

APPENDIX A
Veteran's Case Conferencing Overview

[U.S. Department of Veterans Affairs: Supportive Services for Veteran Families Program
Ending Veteran's Homelessness – Case Conferencing Overview](#)

Given that your By-Name List (including Coordinated Access and Priority list(s)) are not static waitlists, they need constant attention. Each person on your list should have a point person for housing navigation support (based on available resources and your local priorities).

APPENDIX B
Sample Case Conferencing Agendas

Hale O Malama - Region 1 Case Conference

1. Review VI-SPDAT clients scored for PSH (10-20)
 - a. Updates on clients
 - b. Confirm Navigator assignments
2. Shelter + Care referral process updates
 - a. I.H.S. S+C referral process and openings
3. Review of current referrals to State Housing First and Hawaii Pathways
 - a. xx referrals to State Housing First as of 09/23/14
 - b. xx referrals to Kalihi-Palama S+C
4. Announcements
 - a. State RFI notice for Shelter Outreach, Housing Placement, and Emergency Grant programs
5. Targeted Outreach Discussion
 - a. Kakaako Coordinated Outreach
 - b. Other areas in need of coordinated outreach efforts?
6. Other Discussion & Questions
7. Next Meeting

Veteran Navigator Meeting - 6/15/15

1. Agency Introductions
2. Housings/Good News - Veterans housed in the past week and Veterans located
3. Protecting the relationship with the Landlords
4. Weekly housing updates due Friday
5. PSH Applications - Review
6. Veteran Google Doc Updates
7. Veteran List - Review of housing progress for each Veteran



Downtown Integrated Street Outreach Meeting Agenda

July 28, 2015 11:00-12:00 pm

San Diego's 3rd 100 Day IOT-Goals Include:

1. Increase Monthly Placements to get to 30 placements a month
2. April Goal: 20, April Placements: 28
3. May Goal: 25, May Placements: 7
4. June Goal: 30, June Placements: 7

- I. Introductions---*Please include area of your agency's area of focus/expertise AND your favorite dessert.*
- II. Updates
 - a. External Housing Navigation Sheet - to be sent out every 2 weeks
 - b. Increased trainings (SP/PMCP, HN 101, etc.)
 - c. Next Sustainability Review
 - d. St Vincent's Bridge Bed Process
 - e. Store Front – Michael Berry
- III. Feedback
 - a. What have you liked about the HN meetings?
 - b. What you would you like to see integrated into future meetings?
 - c. What other training materials would you like?
 - i. Pass out checklist
- IV. Case Conferencing
- V. New Assignments
- VI. Define **ACTION** Items and follow up.

ACTION Item	Assigned/ PT Person	Follow up/ Note Completed
Update and Distribute IOT Roster	Jessielee	Ongoing
Update/upload Website	Jessielee	Ongoing/ as needed
Update "ASKs" spreadsheet	Teresa	Ongoing/ as needed
Reimbursement Forms	Michael Berry	Available

VII. Adjourn

Please note this meeting is occurring weekly. The next meeting will occur Tuesday August 11, 2015, 11:00-12:00pm, Connections Housing.

Waterloo Region Pre-Housing Case Conferencing Process/Questions

Interview and Introduction

Purpose of this meeting to develop strategies to engage with people, through a strength-based focus, that we are having trouble engaging with, in order to support their journey to housing. Remind group which people focussing on during this meeting (chosen in advance).

People around the table who know the participant provide available information and interactions they've had with them.

- When they last had housing/type(s) of housing. Housing preferences.
- Where do they sleep/stay now and in past?
- What do we know about where they spend their time? Is this different in summer/winter?
- If applicable, what elements of the VI-SPDAT or SPDAT showed lower acuity?
- Share Circle Diagram connections:
 - Circle of Intimacy (a pet, a companion, a significant other)
 - Circle of Friendship
 - Circle of Participation (volunteering/paid employment, participation in programs?)
 - Circle of Exchange (professional relationships – e.g. support workers)
- What has been tried? When was this tried? Any learning since? Should it be tried again?
- What has not yet been tried? Why?

Reflecting on Strengths:

- What are the identified strengths? (e.g. items above, how have they structured their life or decision making to stay alive to this point? What have they demonstrated in sticking to their own interests? e.g., stubbornness can be strength).
- What have they shown us that we can leverage in moving towards housing?

What are the 2-3 main things (e.g. strengths, connections) about this person that we will focus on?

How Might We...

- Engage with this person through their connections?
 - What ideas come to mind? Places? People?
 - Who will follow-up with each action item?
- Engage with this person through their strengths?
- Engage with this person through building trust?

Action

- What will we try? Who will take responsibility for each item?