Coordinated Entry Redesign

→ Implementing Case Conferencing

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Welcome and Introduction

- Welcome & Introductions (15 minutes)

- Agenda Overview (5 minutes)

- Case Conferencing Essential Elements (15 minutes)

- Why Case Conferencing? (15 minutes)

- We Do – Facilitated Breakouts (15 minutes)

- You Do – Facilitated Breakouts (20 minutes)

- Reconvening and Discussion (30 minutes)

Key Elements of Case Conferencing

Connecting People to Housing

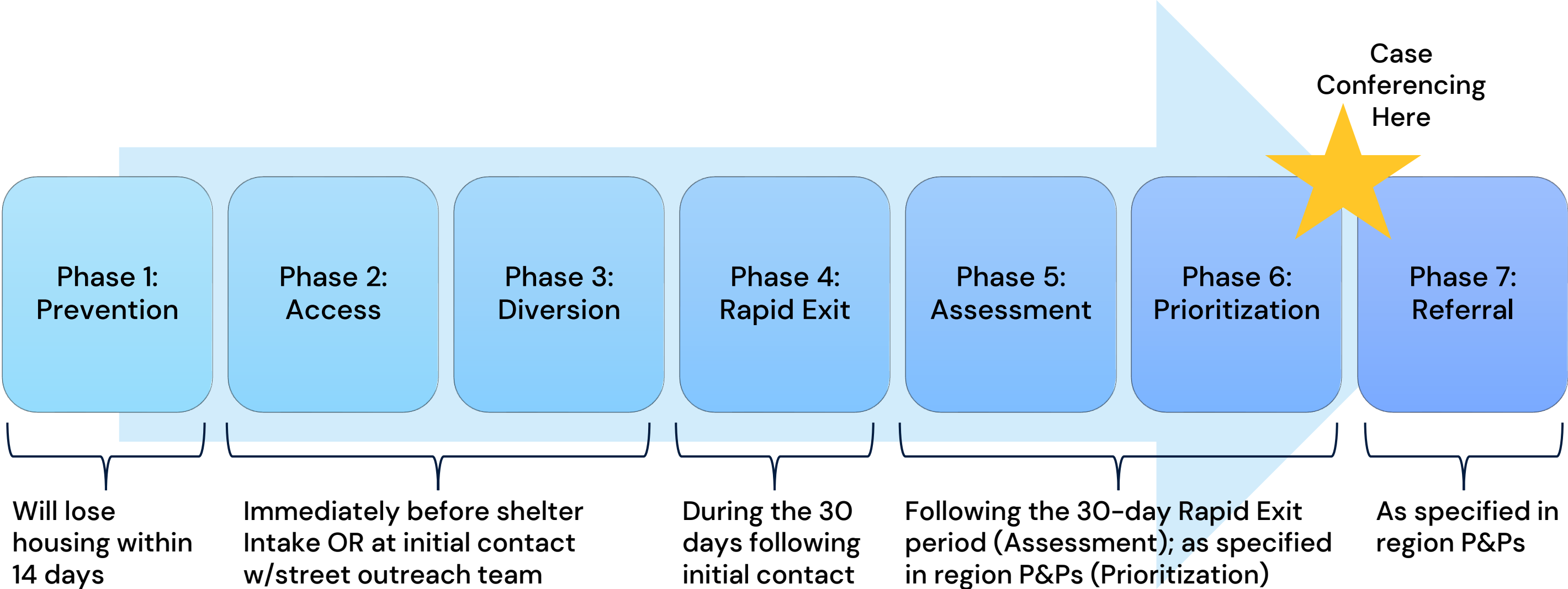**Connecting Providers Across the System**

Coordinating Housing + Services to Meet the Need

Documenting Challenges and Opportunities

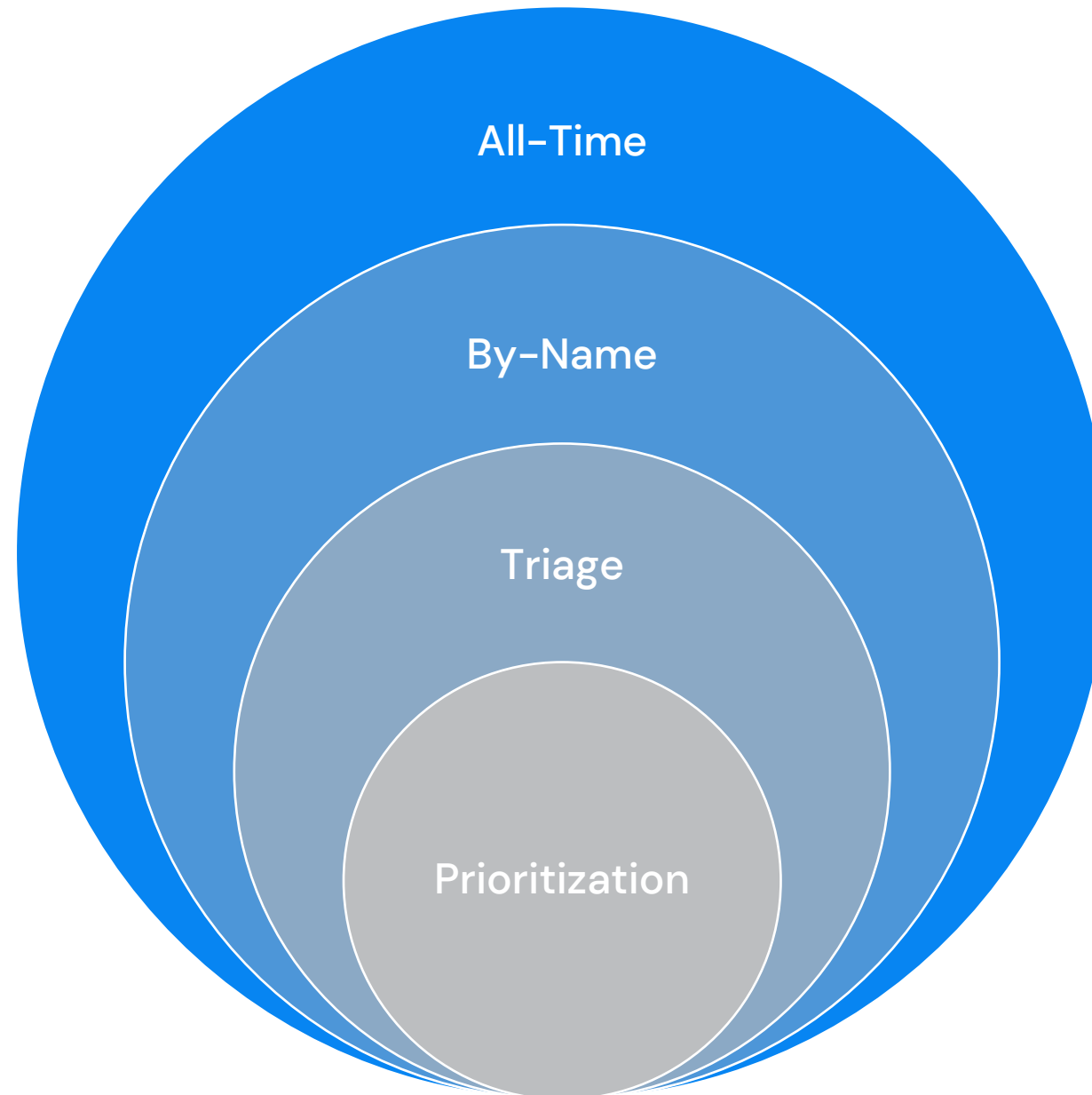**Moving in the Same Direction to End Homelessness**

Coordinated Entry Flow

CE should be a human-oriented process that focuses on delivering the 'lightest touch' services required to return each person to safe, stable permanent housing. This redesign incorporates housing problem-solving (e.g. diversion) as a primary strategy and delivers all services using a progressive engagement approach to conserve the CoC's most expensive interventions (e.g. PSH) for those who need them most.

Case Conferencing Here

| Phase 1: Prevention | Phase 2: Access | Phase 3: Diversion | Phase 4: Rapid Exit | Phase 5: Assessment | Phase 6: Prioritization | Phase 7: Referral |

Will lose housing within 14 days

Immediately before shelter Intake OR at initial contact w/street outreach team

During the 30 days following initial contact

Following the 30-day Rapid Exit period (Assessment); as specified in region P&Ps (Prioritization)

As specified in region P&Ps

Households to Case Conference

All-Time

By-Name

Triage

Prioritization

Households are selected from the Prioritization list.

- Quick cycles of 10 households at a time per region
  - Always the most critical households
- No aging out/cycling off this list until housed

About Regions

- Multi-county
- Geographically contiguous
- Locally coherent
- Include at least one strong CE provider ("anchor agency")
- Ensure less well-resourced areas are supported
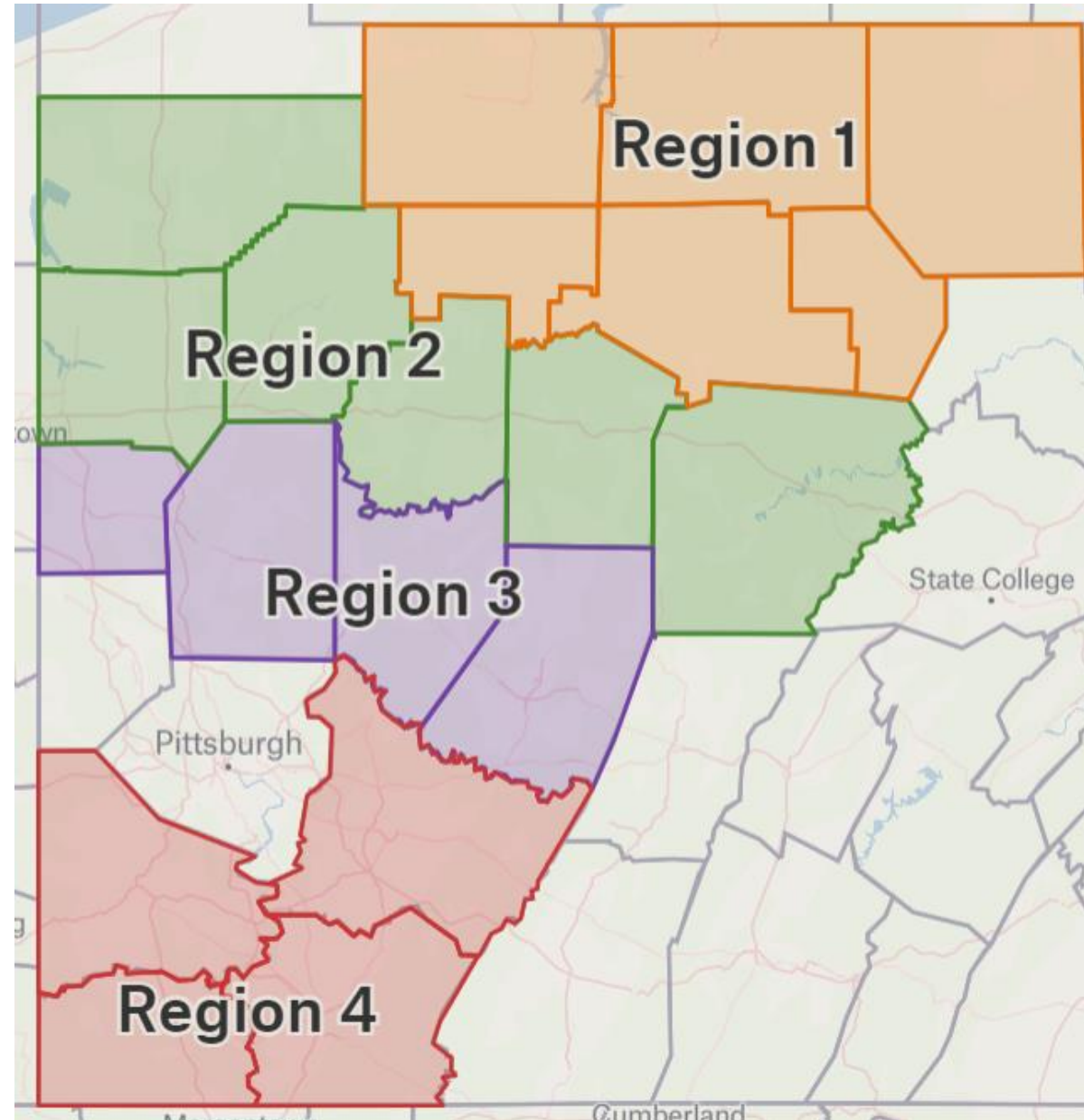
Essential Elements of Case Conferencing

CC IS

- Matching people to housing
- Supplementing VI-SPDAT scores with expert knowledge
- Maintaining urgency + accountability
- Breaking down barriers
- Improving system flow
- Maximizing system resources

CC IS NOT

- Naming and shaming
- Client-level advocacy
- "Owning" client outcomes
- Vent sessions

→ Pulse Check

What other elements of case conferencing do you consider to be "essential?"

Why Case Conferencing?

Framing the Practice and Applying it Regionally

Essential Elements of Case Conferencing

Anchor Agency

- Convening Stakeholders
- Documenting Action Items
- Setting Takedown Targets/Rehousing Goals
- System Orientation

Housing Provider

- Plan for Vacancies
- Adhere to Housing First
- Coordinate Logistics for Referral
- Problem-Solving Focus
- Supports for Households
- Follow Through and Contacts

Customizing Case Conferencing: The Foundation

Choose your focus:

1. Highest Priority
2. System Barrier
3. Resource Available

Choose your format:

1. In person, hybrid, or virtual
2. Presentation or discussion
3. With or without BNL

Choose your facilitator:

1. Familiar with CE process
2. Connected to focus
3. Minimal conflict of interest

Customizing Case Conferencing: The Building

Choose your attendees:

1. Front line staff/supervisors

2. Supportive service providers

3. Housing support providers

Choose your aligned goals:

1. Reduce LOT homeless or barriers to housing

2. Increase number of housing placements

3. End homelessness for a subset of list

Choose your agenda:

1. Bright spots

2. Client discussion

3. Resource matching/sharing

Customizing Case Conferencing: The Heart

If Coordinated Entry is the "brain" of the system, Case Conferencing is the "heart" of the system. Just as in your bodily system, the best decisions are made when you connect your brain and your heart, or in this case, when you connect the data with the client's experience. All brain, and you lose the human touch. All heart, and you lose logic and reason. You need both!

Coordinated Entry – the brain = the system's data as numbers

Case Conferencing – the heart = the client's experience through the system

How can you connect the brain with the heart?

- Present visualized data in a story telling manner

- Share progress to show how CC impacts the numbers

- Create housing focused SMART goals based on data

- Frame challenges as system barriers, not client ailments

- Know when it's time to "shelf" a discussion

We Do

We Do: Case Conferencing Demonstration

- Welcome, Intros, and Icebreaker

- Review Group Agreements and Individual Roles

- Available Resources and Unmet Need

- Work the List

- Action Items

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We Do: Case Conferencing Demonstration

- **Welcome, Intros, and Icebreaker**
  - Name
  - Pronouns
  - Agency
  - Role at Case Conference
  - "What is your favorite way to cool down in the summer?"
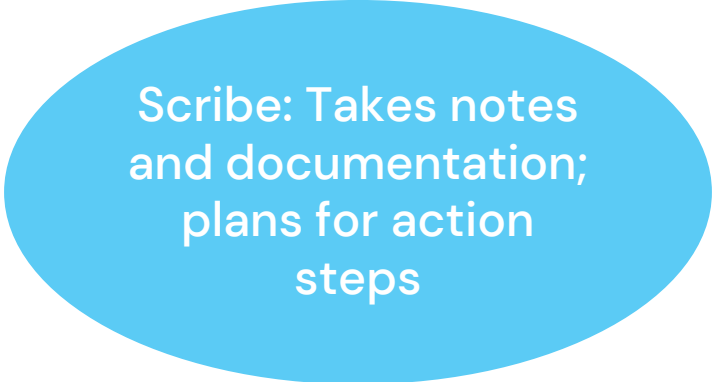
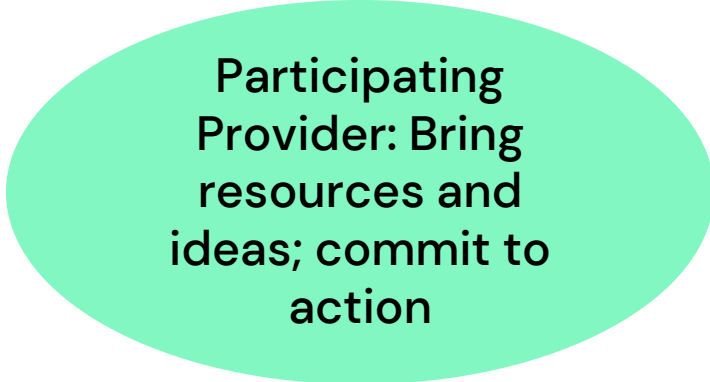# We Do: Case Conferencing Demonstration

- Review Group Agreements and Individual Roles
  - "We're here representing housing resources across the *system*, and agree to make decisions in the best interest of the people accessing system-level resources"
  - "We agree to center the person experiencing homelessness, their experiences, and preferences. As such, we will use respect and dignity when discussing barriers and opportunities"
  - "We agree to hold each other accountable in adhering to Housing First principles, even when it feels difficult or uncomfortable"

Facilitator: Leads the case conference and manages discussion

Scribe: Takes notes and documentation; plans for action steps

Participating Provider: Bring resources and ideas; commit to action

We Do: Case Conferencing Demonstration

- Available Resources and Unmet Need
  - How many clients can we case conference today?
  - How many new vacancies do we have access to? (current + future forecast)
    - Expect to either match or develop next steps for 10–15 households in a 60-minute case conference.
  - What movement have we seen on our By-Name List?
  - What supports and resources are available to those on the BNL who we do not expect to case conference today?

We Do: Case Conferencing Demonstration

- ## Work the List
  - Use a consistent facilitation flow for each client
  - **Client Identification:** State the client's name, and amount of time they've been waiting on the BNL
  - **Follow-Up:** Ask what action has been taken to house the client since the last meeting.
  - **System Barrier:** Define the largest obstacle the client is facing this week. Direct your group to focus on the barrier in your housing process, not a barrier internal to the client.
  - **Action Step:** Record a new action step(s) to move them closer to housing.
  - **Target Move-In Date:** Record a target move-in date, or edit the existing target move-in date, to predict when they will move into housing.

Identification				Housing Status			Prioritization	
HMIS ID	First Name	Last Name	4 Digit SSN	Housing Status	Length of Time on BNL	Date BNL Status Updated	Score	Date of Last Contact
98795	Joe	Smith	1234	Shelter	67	8/9/2023	18	8/9/2023
23457	Jane	Doe	9988	Encampment	38	8/9/2023	19	8/5/2023

Learning Loop			
Current Barrier	This Week's Action Step	Staff Responsible	Target Move-In/ Milestone Date
Specific location preferred	ID preferred housing in a mid-month lease unit		8/15/2023
Prefers housing placement; no shelter	Verify CH status; ID RRH/PSH vacancy (needs supportive services		8/15/2023

We Do: Case Conferencing Demonstration

- Action Items
  - Do all attendees have precise and time-bound goals and action items to work on until the next case conference?
    - Contact with clients; arranging transportation; beginning project intake
  - Did we have the right people at the case conferencing today to match clients to housing or to address critical needs?
    - CoC and ESG providers; VASH and SSVF; victim service providers; street outreach agencies

You Do

You Do: Case Conferencing Facilitation

- Welcome, Intros, and Icebreaker
- Review Group Agreements and Individual Roles
- Available Resources and Unmet Need
- Work the List
- Action Items

You Do: Case Conferencing Facilitation

- Welcome, Intros, and Icebreaker
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  - Pronouns
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You Do: Case Conferencing Facilitation

- ## Work the List
  - When you hear a commitment or next step, restate it to confirm, and ask for a by-when date. Ensure that the note taker is recording it.
  - Redirect to solutions: A great idea may be disguised as a mundane update or barrier, so listen for pathways to solutions and use these to reflect back a possible next step. When appropriate, encourage others who are not this client's case manager to offer ideas or support on action steps.

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You Do: Case Conferencing Facilitation

- Action Items
  - "What obstacle in our system are they facing this week?"
  - "What is your next step in housing them?"
  - An essential question for long-stayers: "What is one thing we haven't tried yet that we can try this week?"
  - "What is one way we can speed up this step?"
  - "Who can we pull in to help generate new options?"

Engage resistant providers by asking for help with a specific action step: They may be hesitant to take part in larger initiatives but ready to collaborate if it means housing a client faster or easier.

Grow multi-agency teamwork: Listen for opportunities to pull in help for a specific action step. For example, if one case manager is having a hard time locating a unit for a client, ask if staff from a different program can help with housing navigation.

$\rightarrow$ **Pulse Check**

In the chat:

"What immediate takeaways do you have?"

"How did the flow of the meeting feel to you?"

Key Questions and Decisions: Structure

- Anchor Agencies

- Roles and Responsibilities

- Regional Policies & Procedures

- Participating Agencies (access points and receiving providers)

- Must:
  - Fill program vacancies through Coordinated Entry
  - Determine a specific role of CE Specialists

- May:
  - Provide certain safeguards for survivors accessing housing through non-VSP agencies
  - Determine alternate case conferencing leads during absences

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Key Questions and Decisions: Procedures

- Meeting hosting and technology choices

- Meeting frequency and length (always adjustable)

- Must:
  - Protect client safety, privacy, and confidentiality
    - Extend HMIS protections to case conferencing participants
  - Adjust based on list increases and decreases and new or diminishing resources

- May:
  - Set time limits for each client/household being discussed
  - Have decision points for when to pause on high-barrier clients and when to continue outside of formal case conferencing sessions

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Next Steps and Implementation Support

- Supporting documentation
- Start slow and iterate (learn quickly and adjust)
- Be supportive and flexible
- Leverage HMIS data

- *ICF is available for demand–response training and technical assistance*

	Housing Needs			
Service Needs	Prioritization Guidance: 1) CoC Prioritization Policies and Written Standards, 2) Active List Protocols, 3) Document Readiness, 4) Case Conferencing	Low: At-Risk of Homelessness (Category 2)	Moderate: Recent first-time homelessness for a short period of time	High: Chronic homelessness or persistent and frequent episodes of homelessness
	Low: Able bodied, connected to workforce, few barriers to employment, self-sufficiency.	Community supports; homelessness prevention; diversion/Housing Problem Solving; income supports	Community supports; diversion/Housing Problem Solving; income supports; affordable housing	Income supports; affordable housing; LIHTC/EHV/HCV or other PHA resources
	Moderate: Some barriers to employment, self-sufficiency. Barriers resolved through services and/or treatment	Community supports; diversion/Housing Problem Solving; income supports; affordable housing	Community supports; Rapid Rehousing; diversion/Housing Problem Solving; income supports; affordable housing	Income supports; affordable housing; LIHTC/EHV/HCV or other PHA resources; potential PSH if barriers increase
	High: Multiple barriers to employment, self-sufficiency, and activities of daily living; needs ongoing services	Community supports; income supports; mainstream services and case management; housing search and location services; affordable housing	Community supports; Rapid Rehousing; diversion/Housing Problem Solving; income supports; affordable housing	Permanent Supportive Housing; long-term living; LIHTC/EHV/HCV with supportive services

→ **Q&A**