

April 2023

# LEARNING LAB: HUMAN CENTERED DESIGN AND CASE CONFERENCING

# Welcome!

## Introductions

- Facilitation Team
- Your Name and Pronouns
- Your County or Tribal Community
- CDSS Program



# Announcements

- ✓ Please note: Today's session is 90-minutes
- ✓ We are looking for you PRK stories!
  - ✓ Drop your name and email in the chat



# Today's Presenters



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# Human-Centered Design and Case Conferencing

# Agenda

- 1. Human Centered Approach**
- 2. Building a new/different agency Culture**
- 3. Case Conferencing Defined**
- 4. Goals and Purpose**
- 5. Case Conferencing Participation**
- 6. Case Conferencing Meeting Management and Information Sharing**
- 7. Housing Barrier Focus**
- 8. Transparent Client Prioritization Adjustments**
- 9. Discussion**

# Goals and Purpose

# Important Context

- **Resources are finite** – if we had enough money and units to house everyone we wouldn't be on this training right now
- **Equity must drive our work** – consider whether and how historically underserved populations are being left out or missed and be **proactive in promoting equitable service strategies**.
- **Be creative** – alternate service plans, Housing Problem Solving, shared housing (roommates!), family re-unification... **we will not solve homelessness without creativity**. We certainly won't solve it with single bedroom units funded by federal/state programs alone.
- Be prepared to discuss client needs and end up disappointed. **Celebrate success**.
- **Larger system challenges must be addressed** and can be in the right forum, which may or may not be in case conferencing.
- If you want changes to how things work, **use your voice** and direct that toward the process and people who can be effective in making those changes.



# Human-centered Design

**Human-centered approach started as Human-centered design. It's meant to be:**

- Tailoring to someone's wants
- Putting people in the center of the plan/goal
- Building off a deep empathy with the people you are serving
- Not centering on program outcomes
- Transforming people from numbers and data into humans with life experience

# Human-centered Design to Approach

## 4 STAGES

1. **Clarify** - access understanding of what a participant wants; The clarify phase requires empathy—the capability of listening and holding space for another person’s experiences.
2. **Ideate** - The clarity you gather in the first phase will lead you to the second: ideate. Creative and interrogating thoughts to overcome cognitive fixedness (or biases) —a mindset in which you consciously or unconsciously assume there’s only one way to interpret or approach a situation.
3. **Develop** - The develop phase is when you combine the ideas/options you’ve brainstormed to create a range of possible solutions. By combining and evaluating your ideas/options, you can better present to participant to support their needs/goals and determine how to move into actionable steps.
4. **Implement** - During this stage, it’s crucial to communicate the ideas/options to participant and community partners (in CC), to foster and facilitate solutions and sustain your relationship with participants and community partners.

# Building a new/different agency culture

- Community Agreements
- Practice Transparency
- Practice open, non-violent communication
- Provide agendas and materials ahead of time
- Come prepared
- Have options
- Find Solutions
- Stop complaining
- Dates and coordination in context to solutions in real time
- Uplift and center on participant's strengths
- Use strengths based language
- Be self aware - check your biases
- Have neutral facilitation
- Advocate for Equity - PLE and Diversified Leadership

# Shared Values and Establishing Norms

## What are Values?

Values are individual beliefs that motivate people to act one way or another. They serve as a guide for human behavior.

## How to share Values?

- Start small
- Find a common belief - end homelessness, get participants housed
- Center on positive and tangible outcomes
- Start meetings with a common value
- Practice, practice, practice
- Keep trying, don't give up!

# Case Conferencing Defined

For purposes of today:

Case Conferencing is an inclusive, community process that allows for a cross-section of service providers to work in an open forum to drive housing and service options both for individual homeless households and broader community needs.

# Case Conferencing Goals

1. To ensure **holistic, coordinated, and integrated assistance across providers** for all households experiencing homelessness in the community
2. To **review the preferences, progress and specific housing barriers** related to individual households housing goal
3. To allow for a transparent, open forum to discuss client information that may need to inform prioritization level or other interventions
4. To **identify systemic and program level barriers to certain populations gaining access to services** in order to further enhance the community's effort to promote equity across the homeless service system
5. To **clarify roles** and responsibilities and **reduce duplication** of services.

# Case Conferencing IS NOT...

1. For cleaning data and discussing minutia issues
2. A time to complain or rehash the same challenges that persist across your geography
3. Discussions about services and needs that don't result in actual people not being homeless anymore or recently housed people not losing that housing
4. General program updates or other information that can (and likely already has) been emailed out or provided publicly
5. Debate – discussion is solutions oriented, not a contest of the loudest voice
6. Result in final housing decisions – Case Conferencing allows for potential solutions and recalibrating housing offers – but clients ultimately choose their housing path based on the options available.

# Case Conferencing Focus

1. Reviewing client cases where **significant housing barriers, including those related to health or housing disparities and equity**, are preventing the housing provider from assisting the household in obtaining permanent housing
2. Reviewing interventions chosen by the household or assigned to determine how best to **meet the needs of the individual household with housing resource that is available**
3. Discussing **longer term housing needs** of those who are over or under-served by current programming
4. Identifying **clear barriers that need to be addressed system-wide**, including those related to housing, service provision, equity and system goals. These barriers are noted for other forum discussion and review by CoC leadership and governance.



# Case Conferencing Focus #1

## Reviewing client cases where significant housing barriers are preventing the housing provider from assisting the household in obtaining permanent housing

- Clients with significant housing barriers or specific housing preferences that are most difficult to find suitable options
- Some clients with barriers or needs have a clear housing path – focus on those for whom identifying a housing option has demonstrated to be most difficult
- Housing barrier discussions should include the households stated preferences/desires, which provider is most appropriate based on any specialized skills, unit configuration and capacity
- Housing barriers are those related to linking a successful tenancy with supportive services – vulnerability alone may not be a housing barrier. Those from underserved populations may face unique barriers
- May include specialized populations (DV, Veterans, Families) where those populations have a different resource base
- All suggestions for housing offers should, whenever possible, take into full account client choice.

# Case Conferencing Focus #2

**Reviewing interventions to determine how best to meet the needs and choices of the individual household with a housing resource that is available**

- Dynamic Prioritization means you are matching the individual or household with the next available resource, even if less than ideal
- In a finite resource environment, some households won't be able to access a longer, more robust resource (such as PSH) even if they qualify
- In this model, we end homelessness faster but it takes more work
- Providers need to support each other and the individuals they are working with in creative solutions for all households, especially those who may qualify for or need PSH but for whom PSH is not available

# Case Conferencing Focus #3

## The longer term housing needs of those who are over or under-served by current programming

- Some RRH clients will need or want longer term mainstream service or affordability support – PSH, Vouches, Mainstream health/clinical supports
- Some PSH clients will need the permanent affordability but may not want or need the services – link to vouchers, LITC, other affordable or subsidized options without the homeless service package
- The long term services, entitlements, enrollments and supports likely exist outside of the homeless service system

# Case Conferencing Focus #4

**Identifying clear barriers that need to be addressed system-wide, including those related to housing, service provision, equity and system goals. These barriers are noted for other forum discussion and review by CoC leadership and governance.**

- Individuals and families with lived experience, including those currently being supported in their housing journey and those who have interacted with the system before should help drive Coordinated Entry protocols and case conferencing lens
- CoC Leadership and Board are charged with a birdseye view of CoC planning and implementation – ground level, real world feedback must help inform broader CoC decisions
- Informing system challenges is NOT an excuse to complain or rehash broader decisions
- System critique should focus on the things that can change: program design, equity decisions, program funding, attention of leadership, advocacy
- System feedback is a limited, but important, objective for the finite time Case Conferencing allows

# Other Focus Considerations

- Individuals with significant vulnerabilities who have not made progress toward housing or who are otherwise difficult to engage in services
- Considerations that promote equity for BIPOC and other historically underserved populations. Use data to drive equity efforts where possible.
- Those with longest history of homeless who have not made progress toward housing or who are otherwise difficult to engage
- Creative housing opportunities: Shared Housing (roommates!), other developments in the mix
- Specialized populations (may need separate meeting) such as: Veterans, Chronic, Young Adults or Youth, Single parents with young children or pregnant, those leaving institutional care, DV survivors, multi-generational households
- Any specialized focus should be clearly identified as a priority for this limited time with consideration for a separate ad-hoc or standing case conferencing (Veterans, DV and Youth likely fit this

# Non-Congregate Shelter – COVID-19

- Considerations to be made for specific case conferencing related to assisting households in hotels/motels to access permanent housing as quickly as possible
- Hotels/motels have shown to be a life-saving intervention during COVID-19, but challenges remain in housing plans for traditionally more disconnected households
- Connections to public health and vaccination programs may be particularly important if hotel/motel targeted to high COVID-19 risk factors
- Hotels/Motels tend to be safer than typical shelter settings leading to less urgency, but expense of interventions and vulnerabilities of those stay may lend to more focus

# Case Conferencing – Participation

- Does not need to be every person involved but those involved must be able to contribute meaningfully
- Programs or Program Types should have one or two representatives to keep the group manageable
- Includes representatives of...
  - Individuals with lived expertise or representative from such CoC Committee, including currently enrolled or homeless households when possible or in discreet forums
  - Coordinated Entry / Prioritization Staff
  - Outreach Providers (one per project)
  - Emergency Shelter Providers (one per shelter)
  - Common Assessment Staff (or rep thereof)
  - Housing Providers (or rep thereof)
  - HMIS Staff (Data!)
  - Case Conference Facilitator Recorder
  - Member of the CoC Board

# Case Conferencing – Participant Expectations

**Show Up:** Case conferencing should generally rely on a group of individuals who commit to being present at all meetings or those with pertinent information related to the households being discussed. Ensure timing and place of meetings are inclusive of those who may be working or in school during business hours, or allow other times or modalities (phone, web) for participation

**Appreciate shared values:** While there may be disagreement on individual decisions, remember that your colleagues are as well-intended as you are. You share a common goal – end homelessness.

**Remain solutions oriented:** Much of case conferencing is about collective problem solving – be prepared to contribute to solutions even if they don't apply to “your”\* client

**\*See note above:** No one is “your” client. All are people your community is collectively working to assist in ending their housing crisis.

**Keep in mind the venue:** Case conferencing is not the forum for complaining about larger system-wide prioritization decisions or methods. The processes that inform client referrals are established in other forums

**You are still an advocate:** The CoC allows for opportunities to advocate – in a standard and transparent way – for client needs or vulnerabilities that may not be apparent on the common assessment. Advocacy should be in the best interest of the client, not your program or preferences.



# Case Conferencing – Pre Work

- Opportunity for CC representatives to submit cases for discussion in advance, limited based on general time parameters allotted, based on agenda buckets
- Call for agenda items for end of meeting (limited)
- Master or CES List cleaned and exported with space for notes and action steps, including eligibility, general situational information, and client stated or implied housing preferences
- Action steps or remaining questions from previous meeting recirculated for advanced thought
- Agenda distributed prior to meeting
- Reminder: Referrals are generally happening in real time, not during case conferencing



# Meeting Prep: Collective Responsibility

- **Prepare for Each Meeting:** Meeting preparation may entail collecting each participating provider's client-level updates prior to the meeting; organizing and updating the Master List; disseminating the Master List and updates to the group prior to the meeting; and clarifying which households will be discussed at the upcoming meeting.
- **Master List Organization:** The facilitator may consider organizing the Master List by priority (Veterans with longest lengths of time homeless, those without housing plans in place but no placement, etc.) instead of by program to help demonstrate system-wide ownership and allow different partners to engage in the case conference process.
- **Set a Deadline for Updates to the List:** The deadline for data updates, specifically for who will be discussed at the next meeting, should be set in advance of the meeting so that the group can discuss the most current information available. Remember to take confidentiality into account when determining updates to the List and distribute it to the participating organizations.

# Meeting Prep: Collective Responsibility

- **Communication of Members' Roles:** It is vital that participating group members also prepare for each case conference meeting by submitting updates to the facilitator by the agreed upon deadline, and sending the appropriate staff or other stakeholders to meetings
- **Accountability:** The facilitator should establish action steps with assigned roles and responsibilities at the conclusion of each meeting. This helps ensure accountability and progress.
- **Affirmation:** Ensure that successes are celebrated and partner efforts are affirmed. Strive to include in your discussion a positive story from one of the providers in the meeting. Rotate who gets to share if possible. No success is too small to celebrate.
- **Celebrate Success!** Community efforts to end homelessness are hard work. Facilitators should be sure to help the group celebrate success – from both the client and system levels – whenever possible.

# Meeting Facilitator: Critical Role

- **Harvest Leadership:** Be deliberate about who you appoint to lead case conference meetings. The person in this role will ideally be able to keep the group on task while facilitating solution-based discussions.
- **Targeted Inquiries:** The person facilitating the meeting should ask probing but respectful questions to promote efficient coordination among providers, appropriate shelter and emergency services, and rapid housing placement. For example: “It looks like the household was linked to PSH more than month ago, but is still staying in a shelter. Is there anything this group can do to help expedite move-in?”
- **Ongoing Adjustments:** Foster the group dynamic by asking for feedback during meetings, by email or through an alternative medium to share. If you find a need to change processes or procedures, add the topic to the agenda for discussion.

# Case Conferencing – Agenda and Timing

- Remember: Time is Limited and Priorities Abound
- Assuming 60 minutes every week
- Sample Agenda
  - I. Welcome, Introductions and Agenda Review (5 min)
  - II. Outstanding Action or Referral Items from Previous Week (10 min)
  - III. Review of Referred Cases with Significant Challenges or Choices for Account – group problem solving (25 min)
  - IV. Review of served households with a significant need for more or less, brainstorm(10 min)
  - V. Review of decisions and other system feedback for leadership (10 min)

**60 minutes goes quick, doesn't it? Make it Count!**



# Key Takeaways

- Shared values provide the foundation needed to center our work based on the choices and needs of those we are working to support
- Nothing for us without us
- Human beings' needs and desires cannot be fully captured with assessments and “scores”
- In a finite resource environment we have to make hard decisions
- Community trust leads to better outcomes for all
- Don't make perfect the enemy of the good – start somewhere and improve as you learn

# Questions and Discussion

**Please visit us on our website. Subscribe to receive updates and Join the conversation!**





[www.changewellproject.com](http://www.changewellproject.com)