

## Overview: Case Conferencing

**Goal: End Homelessness among Veterans.** Federal, state, and local partners have committed to ending homelessness among Veterans in every community as quickly as possible. The goal is to achieve and sustain a well-coordinated and efficient community system that assures homelessness is rare, brief and non-recurring and no Veteran is forced to live on the street.

In order to meet this goal, communities across the country are recognizing the need for a consistent, inclusive **case conferencing process to support case coordination and problem-solving, that occurs regularly with case management and other staff serving Veterans who are experiencing homelessness in the community.** Case conference meetings are best organized using a Master List of all Veterans experiencing homelessness in the community to identify Veterans who would benefit from a case conference among providers.

Case conferencing works in tandem with your Master List to ensure your community is tracking, engaging, and connecting all Veterans experiencing homelessness to permanent housing. While case conferencing meetings may vary by community based on local conditions, this resource identifies common strategies to jumpstart your community's case conference meetings.

### Goals of Case Conferencing

1. To ensure **holistic, coordinated, and integrated assistance across providers** for all Veterans experiencing homelessness in the community;
2. To **review progress and barriers** related to each Veteran's housing goal;
3. To **identify and track systemic barriers** and **strategize solutions** across multiple providers;
4. To **clarify roles** and responsibilities and **reduce duplication** of services.

### Case Conference Logistics

**Identification of Veterans to Review:** It is important to keep your primary focus on reviewing the most vulnerable Veterans on your list and/or those with greatest barriers to shelter and rapid placement in permanent housing. Below are some example approaches for prioritizing which Veterans to review during a case conference meeting (these should be adapted based on local needs or conditions):

- **Length of Time Homeless:** Review the top ten Veterans with the longest histories of homelessness.
- **Vulnerability:** Review Veterans who have the greatest physical or mental health vulnerabilities or who are otherwise at greater risk of harm based on assessment information or other provider knowledge of particular Veterans.
- **Veterans with dependent children,** particularly if fleeing domestic violence.
- **Newly Homeless Veterans:** Discuss the Veterans who are newly homeless and have the highest vulnerabilities or barriers to obtaining permanent housing.
- **Provider-Selected Challenging Cases:** Review the top two most challenging cases from each provider.
- **Combination of Approaches:** Use a combination of approaches, rotating them using a predictable schedule.

**Meeting Attendees and Format:** Organize meetings to ensure key service and housing partners are actively involved and dialogue is focused on case coordination and problem-solving.

- **Representing Organizations:** Consider which organizations should be represented in case conference meetings based on who serves Veterans in your community – this may be a mix of SSVF, street outreach, emergency shelter/HCHV providers, transitional housing/GPD providers, local VA and CRRC staff, HUD-VASH, other PSH programs, and local CoC staff.
- **Attendees:** Work with your stakeholders to determine which specific staff should be present at case conference meetings. Ideal attendees are those who have in-depth knowledge about the status, needs and preferences of each Veteran being reviewed and who are also able to make decisions regarding provision of shelter, services or housing assistance. This may be a program director, program manager, coordinator, housing specialist or case manager. When feasible and appropriate, it may be important to involve the Veteran directly in their own case conference (prior to or during the meeting) to allow them to express their preferences and engage in problem-solving.
- **Streamlining Attendees:** You may find that there is a need to streamline your attendees to keep the group's size manageable. Consider appointing liaisons (e.g. SSVF grantees, VA Homeless Liaison, Coordinated Entry Team) to represent and coordinate Veterans' housing plans with selected providers. Or you could design specialized case conference teams that focus on a specific sub-population of Veterans (e.g. a family team and a singles team).
- **Medium of Meeting:** Some communities can easily convene in-person and others may require some of the work to be done by phone or video conferencing. If you do need to use conference calls, make sure the facilitator calls on each attendee to ensure comprehensive participation and system coverage.
- **Standard Meeting Agenda:** Keep the standard case conference agenda simple and to the point. Remember, the primary focus of case conference meetings are the individual Veterans who are being discussed. A simple agenda might include the following items:
  - *Welcome & Introductions*
  - *Key System Updates:* Be sure to keep these brief and include any critical system indicators, such as average length of time for all Veterans to access housing.
  - *Case Conferencing:* Veteran-specific updates and discussion. See below for example review format.
  - *Follow Up Items:* General, non-Veteran specific follow-up or action items identified during the meeting.

**Meeting Frequency:** Case conferencing frequency depends on various factors, such as those outlined here. Generally, meetings should occur weekly, but certainly no less than at least once per month monthly and more frequently when possible or necessary.

**Client-Level Review:** Consider creating a standard set of elements to review for each Veteran so providers can be prepared to effectively discuss cases. Below are suggested elements to review:

- **Current status:** For example: active in shelter, active unsheltered, missing and whether that status has changed since the last case conference review
- **Veteran Preferences:** Housing plans and next steps should be guided by the Veteran's preferences.
- **Critical Housing Placement Barriers:** Review and problem-solve any barriers to housing placement.
- **Critical Service Barriers:** Review and problem-solve any challenges to connecting Veterans to critical services.
- **Current Safety:** Make sure any unsheltered Veteran has a safe place to stay tonight and in near term.
- **Next Steps:** Identify any immediate or critical action items related to the Veteran, including roles and timelines.

## Meeting Facilitation and Management

### *Case Conference Management & Facilitation*

- **Facilitator Role:** 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 Veteran signed a lease last month, 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.

### *Facilitator Duties*

- **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 Veterans 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, 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 updates to the Master List, specifically for Veterans 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.
- **Communication of Members’ Roles:** It is vital that participating group members also prepare for each case conference meeting by submitting Veteran updates to the facilitator by the agreed upon deadline, and sending the appropriate staff to meetings who work with the specific Veterans being discussed.
- **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 among Veterans are hard work. Facilitators should be sure to help the group celebrate success – from both the client and system levels – whenever possible.