

River Valleys Continuum of Care Coordinated Entry System: Case Conferencing Procedures

Introduction

Case conferencing is a region's formal, planned, and structured meeting in which providers coordinate staffing assignments, provide client level updates, and ensure coordination of services. The goal of case conferencing is to provide holistic, coordinated, and integrated services across providers, and to reduce duplication. Case conferences are usually multi-disciplinary, and include multiple providers from throughout the region. Case conferences should be used to identify or clarify issues regarding a participant's housing status and progress towards permanent housing; to review activities including progress and barriers towards housing; to assign primary Housing Navigation responsibilities; to strategize solutions; and to adjust current service plans, as necessary.

Communities across the country recognize the need for consistent, inclusive case conferencing to support their coordinated entry process. The case conferencing process allows for case coordination and problem-solving to occur regularly with case management and other staff serving households experiencing homelessness in that community. Case Conferencing is also utilized to make eligibility determinations that can lead to referrals for services. It is a place where as a collective community, prioritization for services can be determined.

Goals

1. To ensure holistic, coordinated, and integrated assistance across providers for all households experiencing homelessness in the River Valleys CoC region;
2. To review progress and barriers related to each household'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.

Guiding Principles

Collective Ownership and Responsibility

Participating agencies will share the responsibility of working to house clients and use the team's collective brain power to house clients faster.

Participating agencies will together own the efforts, the failures, and the successes of the group.

Active Participation

Participating agencies will commit to active, not passive participation in case conferencing. Providers will share thoughts, contribute to possible solutions, share the workload, and be a team player. Participants will help keep one another accountable.

Bravery and Courage

It requires bravery to try new tools and techniques. Providers will demonstrate bravery to challenge and address gaps and difficulties with our systems. Participants will acknowledge that we may need to focus on changing the system to house a client, instead of changing the client to fit the housing. Providers should create housing and programs that are ready for the participant instead of requiring the participant to be ready for the housing.

Positive Intent and Trust

Participating agencies will trust each other and approach all conversations and cases with the best of intentions. We are all here to house homeless households and to prevent and end homelessness.

Person-centered Focus

Participating agencies will acknowledge the uniqueness of each client and household. Case Conferencing will use a person-centered approach that acknowledges people's preferences and values and work to identify possible resources and outcomes that meet the clients' chosen needs.

Being Flexible and Adaptable

Participating agencies will acknowledge that things change. At times, the focus and/or purpose of the case conferencing may need to change to address changes funding, homeless trends, unique client circumstances, etc.

Growth Promoting

Participating agencies will promote growth: value innovation, leverage best practices, and learn from each other's experiences and knowledge.

Guidelines for Participation

- Agencies participating in case conferencing must have a signed Coordinated Entry System Partner Agreement on file with the River Valleys CoC.
- Client information shared during case conferencing must be limited to information that is relevant to their housing needs.
- Case conferencing participants are expected to uphold professional standards of conduct; exhibiting respectfulness, fairness, and integrity.

Procedures

Regions

Case conferencing will cover the entire 20 county River Valleys CoC region, but case conferencing calls will be split into 3 regions. Service providers may choose to attend other region's case conferencing calls as needed.

Region 1

Region 1 includes the counties of Fillmore, Goodhue, Houston, Olmsted, Wabasha, and Winona.

Region 2

Region 2 includes the counties of Dodge, Freeborn, Mower, Rice, and Steele

Region 3

Region 3 includes the counties of Blue Earth, Brown, Faribault, Le Sueur, Martin, Nicollet, Sibley, Waseca, and Watonwan.

Participating Agencies and Staff

Participation may include Assessors, Housing Providers, CE Housing Navigators, Outreach workers, and Victim Service Providers. Participating agencies should decide who is most appropriate to attend case conferencing calls.

Frequency

Case conferencing will occur once a month per region for approximately an hour per meeting. There will be CoC- wide case conferencing on a quarterly basis taking place during the CES Provider's Meeting on the 4th Friday of the month during the months of January, April, July, and October. Regional case conferencing will occur when there is not CoC- wide case conferencing.

Preparation

At least two days prior to the case conferencing call the CE Specialist will send a list of participants who will be discussed to the participating Service Providers in each region. The list will be sent in a password protected document via email. Service Providers should review the list of participants prior to the case conferencing call and review any case notes, agency database, etc. for pertinent information. The agency needs to provide a status update of any action steps that were assigned to them.

Standard Set of Elements to Review

- Participants to review: Each region will determine who to review, but the population may be the following, but not limited to: those not in a place meant for habitation, longest length of time on priority list, youth, active referrals, etc.
- Current location: For example; staying in shelter, doubled up, missing, and whether that status has changed since the last case conference review.
- Client preferences: Housing plans and next steps should be guided by the household's preferences.
- Critical housing placement barriers: Review and problem-solve any barriers to housing placement.
- Current safety: Address any immediate safety needs the household may have.

Participant Follow-up

At each case conferencing call there should be a commitment by providers to follow-up for each client and it is expected providers will report back at the next case conferencing call. Providers will identify any immediate or critical action items related to the household, including roles and timelines. It should be decided who the follow-up person will be at time of case conferencing call.

Facilitator and Note Taker

Each case conferencing call will have a facilitator and a note taker. The facilitator will be responsible for keeping time, leading the discussion and ensuring it stays on track. The facilitator will also make sure action steps are assigned and confirming there is a person to follow-up. Lastly, the facilitator will make sure there is active participation and feedback from all. The note taker will keep notes of what was discussed for each Participant so they can be reviewed from month to month if needed. Both roles of facilitator and note taker will rotate from different participating agencies alphabetically each month. If the assigned facilitator and note taker cannot be there they should try to find a replacement and inform the CES Specialist.

Other Considerations

Other Participants can be brought up during call as time allows.