



CASE CONFERENCING

Presenter:

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WI Balance of State CoC

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What is case conferencing?



- No HUD definition of case conferencing
- No HUD requirement to participate in case conferencing
- WIBOSCO role in case conferencing
 - At this time, the WI BOSCO highly encourages participation in case conferencing but, it is not required.
 - CoC and ESG funded agencies have signed agreements that bind them to the CE policies and procedures related to privacy and data security.
- It depends on who you ask
 - VA 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.
- Address the needs of those in our system who are "stuck"
 - A routine, centralized process that helps community leaders, homeless programs and housing navigators monitor and advance the progress of people experiencing homelessness toward housing.
 - 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 everyone on your Coordinated Entry 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.

Confidentiality?



- Was the client asked/consented to be discussed?
 - WIBOSCO Coordinated Entry form does not provide client consent.
 - De-identified vs. By name conversations (with client consent).
- Do attendees have confidentiality duties?
 - HUD Coordinated Entry Management and Data Guide: *Attendance in case conferencing meetings or portions of meetings should be limited to necessary staff and managed thoughtfully, ensuring that attending staff understand the terms of information disclosures and how to securely protect information. This may mean limiting meetings to staff from agencies that have signed agreements that bind them to the CE policies and procedures related to privacy and data security. Though HMIS end-user agreements should already cover privacy and data security standards, these may be insufficient to cover the disclosures within a case conferencing meeting because providers that do not contribute to HMIS may be present.*
- How are Domestic Violence, Sexual Assault, Substance Abuse, Mental Health providers ethically allowed to participate?

Building your case conferencing model:



- Who are all the people experiencing or vulnerable to homelessness?
 - Coordinated Entry HMIS prioritization lists
 - Coordinated Entry Non-HMIS prioritization lists
 - Street Outreach
- Don't exclude confidential providers
 - They can hear info, offer expertise, share info with clients, build trust in your network, etc.
- Who will be discussed?
 - How will you decide?
 - What input will that person have into whether or not they are discussed closely?
- What is the goal and focus of these meetings
 - Prioritization for available housing?
 - Getting individuals "unstuck"?
 - Making connections to non-housing resources?

Building your case conferencing model

(Continued) :

- How will you format what is talked about?
 - What are appropriate boundaries?
 - What is relevant to problem solving?
 - How are different types of providers allowed to share differently?
 - How do we ensure there is no pressure to violate ethics?
- How will you define case conferencing success?
 - How will this be collected and distributed?

How to improve already existing case conferencing?

- Ensure providers get a better understanding of each other and the local landscape.
 - Can providers be vulnerable about where their own practices are a part of the problem?
 - Can lessons learned from case conferencing be linked to organizational change?
- What is the opportunity for the person to participate in the conversation about their own housing needs?
 - Can they provide instructions to providers to share specific info?
 - Can they attend the discussion?
 - Are we informing clients about what was discussed?

Contact Information



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