

# CASE CONFERENCING



## *How Durham Moves From “My Clients” to “Our Clients”*

A core function of Durham’s Strategic Framework to Make Homelessness Rare and Brief |  
Action-oriented, by-name, time-bound | Facilitated by the HOPE team

## Why It Matters

The by-name list only matters if someone, somewhere, is moving each person on it toward housing. Case conferencing is the recurring, multi-agency meeting where that happens — where providers come together to take one meaningful step for every neighbor on the list.

## The Approach

Durham uses an action-oriented case conferencing model adapted from Built for Zero communities that have historically reached functional-zero milestones and/or verified population-level reductions. The shift from traditional case conferencing is real: the meeting is no longer a forum for sharing client struggles — it is a structured space where providers commit to next steps, predict target move-in dates, and treat each unresolved case as a signal about the system, not the client.

## Key Elements

- **A defined cadence and population focus.** Recurring meetings organized by population — veterans, chronically unhoused neighbors, families, and general/non-chronic — so the right providers are in the room for the right cases. At least one in-person meeting per month per population to build trust.
- **The Learning Loop, per client.** For each name discussed: state the client and time on the by-name list; ask what action has been taken since last meeting; name the largest system barrier this week; record a new next step with owner and due date; set or update a target move-in date. Two to three minutes per client.
- **Target move-in dates as the operational discipline.** Every client matched to a resource has a predicted move-in date. Missed dates are treated as system learning opportunities, not staff judgments. The list is sorted by target date to forecast against monthly goals.
- **A trained facilitator and clear meeting jobs.** HOPE team staff facilitate, trained in BFZ facilitation tools. Rotating roles for facilitator, scribe, and timekeeper, and a pre-meeting prep routine: clean the BNL three days out, share updates two days out, draft the agenda one day out.
- **Tight integration with the by-name list.** Updates pulled from HMIS Non-Confidential Notes rather than manually compiled, with fields for current barrier, this week’s action step, staff responsible, and action step completed.
- **A feedback loop to leadership.** Recurring barriers and stuck cases roll up to the Champions Table, the Executive Roundtable, and Improvement Teams for path-clearing — closing the loop between case-level work and system change.

## Why It Works

Case conferencing is the operational layer where the by-name list becomes action. The meeting is where the system holds itself accountable for moving each person on the list toward housing, where providers learn from each other’s successes, and where the barriers that block housing get named clearly enough to be fixed at the system level.