

**Case Conferencing Confidentiality Agreement**

**Purpose:** The focus of case conferencing is to identify those who are unstably housed and offer support and coordination to aid these individuals in actualizing their self-identified goals through a communal effort. We recognize that these individuals are active members in our community, and as such we believe they deserve the same respect as we would show any other peer. We are working toward achieving “functional zero” and building capacity within our community, as well as towards identifying and removing barriers that lead to housing instability and/or that prolong it.

**Collaboration:** To truly achieve any resolution to homelessness we must recognize it as a community issue. The people served by our agencies do not “belong” to us or our programs. True belonging requires community, and so we have a communal responsibility to ensure that people have access to safe, stable, and sustainable housing opportunities. It is imperative that each of us understand and respect the varying values, eligibility requirements, and confidentiality limits of the organizations represented to collaborate effectively.

**Confidentiality:** This is an important element to maintaining ethical, respectful, and transparent boundaries and provides the foundation for the rapport we all work so hard to develop with individuals. The intent of case conferencing is to address the needs of others from a harm reduction approach, and this philosophy should be at the forefront of our minds as we share information. Any information presented should relate directly to (a) providing coordinated housing, (b) improving coordination of services to assist homeless individuals’ transition out of homelessness, and (c) identifying barriers and service gaps that block the path out of homelessness. Any unnecessary information, or that which could cause undue harm should be withheld. Only information which can be used to inform the conversation and directly benefit the person addressed should be shared. Any information shared during these meetings that pertains to the persons conference will not be shared outside of this meeting, except in matters of safety and security or with written consent.

**Positive Development and Person-Focused:** People are the experts of their own lives. This is a foundational philosophy to the work we are looking to accomplish through case conferencing. Specifically, this means that as service providers we do not know what the best course of action is for people discussed in these meetings; though we may understand what their desired outcomes are, and possible resources available to support these goals. No person addressed by this group is under any obligation to accept the support offered, nor is any denial to be seen as a lack of motivation, desire, or commitment on their part.

**THIS RELEASE DOES COVER HEALTH/MENTAL HEALTH/DRUG TREATMENT INFORMATION. If needed, an agency-specific Release of Information should be used for detailed release of records, including HIPAA releases as appropriate.**

***By signing below, I acknowledge that I have read and agree to the terms of this document. I understand that only individuals that have signed a Case Conferencing Universal ROI can be discussed for the purpose of: (a) providing coordinated housing, (b) to improve coordination of services to assist homeless individuals’ transition out of homelessness, and (c) to identify barriers and service gaps that block the path out of homelessness. I understand that violation of this agreement may result in an inability to participate in any future case conferencing meetings.***

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Participant’s Agency: \_\_\_\_\_

Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness’ Agency: \_\_\_\_\_