

Balint Leadership Training Intensive: Suggested Checklist for Faculty Pairs

This checklist is not intended to be mandatory or even to set a standard. It is a tool to help with the rapid and comprehensive framing of the co-leader relationship needed to working together at an intensive - especially for the first time. Our hope is that this checklist will provide the "soil" for the growth and development of intensive co-leader pairs. We began to develop it at the end of a Balint Leadership Intensive. While many experienced faculty seem to evolve into their roles without significant stress and might not need this tool, for first time co-leaders, and even for those with some experience, becoming oriented with a new and time-limited co-leader can be a daunting task. Thus, this checklist was developed to identify items that might be important to reflect upon before, at the start of day one and during the process of leadership intensives.

			Notes
Pre-group Items:			
A.	Co-leader roles (primary/secondary vs. parallel with flow determined as case unfolds; tracking of time and signaling; asking for cases)	<input type="checkbox"/>	
B.	Discussion of co-leaders' theoretical orientation (e.g. psychodynamic, behavioral, family systems)	<input type="checkbox"/>	
C.	Balint practices (policy on pagers, late arrivals, interruptions, food, etc.)	<input type="checkbox"/>	
D.	Use of push-back technique – determined in advance by co-leaders (always, never, sometimes, or when necessary due to status such as case presenter unable to disengage and to become reflective or group unable to allow this, such as with prolonged clarification questions)	<input type="checkbox"/>	
E.	Degree and content of co-leader relationship transparency – discussing parameters and other issues in front of the group (e.g. whether to permit a case, preference for the first few cases to be presented by physicians)	<input type="checkbox"/>	
F.	Decisions about how to respond to unique cases (parameters such as: deceased patient/no potential for continuity, student advisee as "patient," patient shared by more than one member or with co-leader of group)	<input type="checkbox"/>	
G.	Hot button issues (such as one leader dealing with a personal loss or impending loss, illness, or being sued)	<input type="checkbox"/>	
G1.	Develop a signal for the other to take over, in the case the doctor-patient material might become too close to the personal for the co-leader to function optimally	<input type="checkbox"/>	
G2.	Have the other one aware in case the index co-leader only responds to it unconsciously as it appears in the group	<input type="checkbox"/>	

H.	Consider “contract” not to cut across interventions of your co-leader—wait for 4-5 “bounces” (member comments) to allow the effect of the intervention to play out	<input type="checkbox"/>	
Orientation at the Beginning of the First Small Group Session:			
A.	Ground rules: reiteration and amplification on confidentiality/ boundaries, taking responsibility, time, turn-taking	<input type="checkbox"/>	
B.	Brief history of Balint groups	<input type="checkbox"/>	
C.	Parameters of cases (as agreed in “F” above- needs to be clarified between the leaders but may not be spelled out to the group if leaders are OK with allowing these parameters)	<input type="checkbox"/>	
Thursday Evening Debriefing Meeting:			
A.	The case & group process	<input type="checkbox"/>	
B.	Co-leader interventions and interactions	<input type="checkbox"/>	
C.	What else might have been happening at different levels of the group/systems; any negative leader counter-transference issues	<input type="checkbox"/>	
D.	What else could have been done, what else might be done next time	<input type="checkbox"/>	
E.	Reinforce what went well	<input type="checkbox"/>	
F.	Issues in the environment which might affect the group process- interruptions, loss of a member, trouble brewing in another group, need for consultation with other faculty and or Intensive sponsors	<input type="checkbox"/>	
Friday Morning Meeting:			
A.	Check in with each other (current group and conference mood e.g. concerns about the venue, issues and especially themes that are coming up in side conversations, situation of each leader)	<input type="checkbox"/>	
B.	Communication (Is co-leadership team functioning smoothly with good communication?)	<input type="checkbox"/>	
C.	Review progression of cases/themes with regard to group development	<input type="checkbox"/>	
D.	Planning for management of challenging situations and how to address more vulnerable or challenging members; silent members; acting out; examining contaminating counter-transference to a group member, need for structural or other strategic intervention (such as restating group process as a specific intervention in response to a group member who doesn't understand or who might be acting out)	<input type="checkbox"/>	
E.	Leadership tasks for that day re: leading videotape review, co-leading with credentialing candidate; balance of co-leadership with members who wish to try leading, deciding on whether to allow two members to co-lead together	<input type="checkbox"/>	
F.	Themes in conference	<input type="checkbox"/>	
Friday Evening Debriefing Meeting:			
A.	The case & group process	<input type="checkbox"/>	
B.	Co-leader interventions and interactions	<input type="checkbox"/>	

C.	What else might have been happening at different levels of the group/systems; any negative leader counter-transference issues	<input type="checkbox"/>	
D.	What else could have been done, what else might be done next time	<input type="checkbox"/>	
E.	Reinforce what went well	<input type="checkbox"/>	
F.	Issues in the environment which might affect the group process-interruptions, loss of a member, trouble brewing in another group, need for consultation with other faculty and or Intensive sponsors	<input type="checkbox"/>	

Saturday Morning Meeting:

A.	Check in with each other (current group and conference mood e.g. concerns about the venue, issues and especially themes that are coming up in side conversations, situation of each leader)	<input type="checkbox"/>	
B.	Communication (Is co-leadership team functioning smoothly with good communication?)	<input type="checkbox"/>	
C.	Review progression of cases/themes with regard to group development	<input type="checkbox"/>	
D.	Planning for management of challenging situations and how to address more vulnerable or challenging members; silent members; acting out; examining contaminating counter-transference to a group member, need for structural or other strategic intervention (such as restating group process as a specific intervention in response to a group member who doesn't understand or who might be acting out)	<input type="checkbox"/>	
E.	Leadership tasks for that day re: leading videotape review, co-leading with credentialing candidate; balance of co-leadership with members who wish to try leading, deciding on whether to allow two members to co-lead together	<input type="checkbox"/>	
F.	Themes in conference	<input type="checkbox"/>	

Saturday Debriefing Meeting:

A.	The case & group process	<input type="checkbox"/>	
B.	Co-leader interventions and interactions	<input type="checkbox"/>	
C.	What else might have been happening at different levels of the group/systems; any negative leader counter-transference issues	<input type="checkbox"/>	
D.	What else could have been done, what else might be done next time	<input type="checkbox"/>	
E.	Reinforce what went well	<input type="checkbox"/>	
F.	Issues in the environment which might affect the group process-interruptions, loss of a member, trouble brewing in another group, need for consultation with other faculty and or Intensive sponsors	<input type="checkbox"/>	

Sunday Morning Meeting:

A.	Check in with each other (current group and conference mood e.g. concerns about the venue, issues and especially themes that are coming up in side conversations, situation of each leader)	<input type="checkbox"/>	
----	---	--------------------------	--

B.	Communication (Is co-leadership team functioning smoothly with good communication?)	<input type="checkbox"/>	
C.	Review progression of cases/themes with regard to group development	<input type="checkbox"/>	
D.	Planning for management of challenging situations and how to address more vulnerable or challenging members; silent members; acting out; examining contaminating counter-transference to a group member, need for structural or other strategic intervention (such as restating group process as a specific intervention in response to a group member who doesn't understand or who might be acting out)	<input type="checkbox"/>	
E.	Leadership tasks for that day re: leading videotape review, co-leading with credentialing candidate; balance of co-leadership with members who wish to try leading, deciding on whether to allow two members to co-lead together	<input type="checkbox"/>	
F.	Themes in conference	<input type="checkbox"/>	
Sunday Debriefing Meeting:			
A.	The case & group process	<input type="checkbox"/>	
B.	Co-leader interventions and interactions	<input type="checkbox"/>	
C.	What else might have been happening at different levels of the group/systems; any negative leader counter-transference issues	<input type="checkbox"/>	
D.	What else could have been done, what else might be done next time	<input type="checkbox"/>	
E.	Reinforce what went well	<input type="checkbox"/>	
F.	Issues in the environment which might affect the group process- interruptions, loss of a member, trouble brewing in another group, need for consultation with other faculty and or Intensive sponsors	<input type="checkbox"/>	
After Conference:			
A.	Co-leader evaluation forms	<input type="checkbox"/>	
B.	Brief meeting to process working relationship and who will take responsibility for emailing group members at 6 months post intensive	<input type="checkbox"/>	

This document was originally prepared by Maria Devens, Ph.D., ABPP and Frank Dornfest, M.D.

Many thanks to Ritch Addison, Ph.D. for constructive feedback on this document and to John H. Rogers, M.P.H., for assistance in preparation.