

PRACTICAL GUIDE FOR PLANNING A BALINT INTENSIVE

This document represents the collected wisdom and effective strategies for planning and executing a successful Balint Leadership Training Intensive. It is meant to act as a “how to” guide and support for hosts and should be used **in addition** to the document “Principles, Requirements and Guidelines for hosting the Balint Leadership Training Intensive” which outlines mandatory requirements.

1. General considerations
 - a. Start early (more than **one year ahead** is ideal)
 - b. Consider whether your location is reasonably easy to reach by air travel
 - c. Begin ongoing dialogue with the Coordinator of Intensives
 - d. Clarify whether you need to utilize an organization to do the formal conference planning (more expensive and less desirable), or can do the planning informally within your department (other than the formal CME certificates)
 - i. If an organization does the formal conference planning:
 - 1) Clarify early precisely what the charges will be
 - 2) Clarify responsibilities and accountability for each party, including the ABS. See Joint Sponsorship Agreement for details. (Atch 1 – Joint Sponsorship Agreement)
 - 3) Clarify early where the liability will be if the intensive does not break even (ABS will not be liable beyond seed money)
 - 4) Ensure that there is a way to get out of the contract prior to the registration closure date without any financial liability (including hotels, restaurants, conference rooms as well as other planning organizations)
 - ii. If planning done informally within your department, clarify the financial responsibility for:
 - 1) Personnel time for departmental staff (Atch 2 – Administrative Support Tasks)
 - 2) Materials provided by department.
 - 3) Services, such as PR, mailing, printing, dinners, etc. done or sponsored by the department
 - 4) Fees for other services provided.
 - iii. Review the agreement with the Coordinator of Intensives and ABS Treasurer before signing
 - iv. Review, clarify and agree upon administrative task list with whatever administrative person will be supporting you (Atch 2)
2. **T – 9 months**
 - a. Choose dates (Atch 3 - sample template calendar)
 - i. Check dates of other potentially conflicting conferences and events
 - 1) AAFP (American Academy of Family Physicians)
 - 2) STFM (Society of Teachers of Family Medicine)
 - 3) AACH (American Academy of Communication in Healthcare)
 - 4) AFMRD (Association of Family Medicine Residency Directors)
 - 5) APA (American Psychological Association)
 - 6) APA (American Psychiatric Association)
 - 7) APPD (Association of Pediatric Program Directors)
 - 8) Match Day (Spring)
 - 9) Family in Family Medicine conference (Spring)
 - 10) Behavioral Science Forum (Fall)
 - 11) Regional STFM meetings
 - 12) Any other Balint events that are already scheduled

- 13) Others, especially including local conferences
- ii. Determine dates of Spring or Fall holidays
- iii. Determine dates of most Spring breaks
- iv. Choose several potential open dates
- v. Consult with Intensive Coordinator on final date and confirm selected date with ABS Council through proposal submitted to Council (see T-8 months)

b. Choose meeting location

- i. Several financial factors to consider and negotiate
 - 1) Room rates for attendees
 - 2) Charges for meeting rooms
 - 3) Charges for meals and breaks (refreshments) along with specific menu options, both in and outside of hotel
 - 4) Charges for video recording and playback equipment
 - 5) Cut-off dates that allow for cancellation or modification of hotel/meeting rooms without financial penalty.

c. Decide whether you are going to hire a videographer or use the ABS cameras

d. If not using ABS cameras,

- i. choose videographer (Atch 4 – Hiring a videographer)
- ii. Reserve date and time with videographer, confirm charges for video recording

3. T – 8 months

a. Prepare draft of budget (Atch 5 – budget template)

- i. Include break-even number of registrants for the Intensive to be solvent for 2, 3 and 4 groups
- ii. Determine registration fee schedule including discounts and early registration.
 - 1) Consider previous intensive fees
 - 2) Consider break-even point
- iii. Use Coordinator of Intensives and Treasurer to review draft budget

b. Prepare draft of Intensive schedule (see Atch 6 - sample schedule)

c. Choose faculty

- i. Work with the Coordinator of Intensives to review and consider the list of credentialed leaders.
- ii. All faculty must be credentialed Balint group leaders
- iii. Consider those nearest geographically and include some faculty from outside your geographic area (some financial support for outside faculty as per ABS policy)
- iv. Consider including one or two newly credentialed leaders
- v. Consider gender and discipline
 - 1) Ideal to have a physician and behaviorist for each group
 - 2) Ideal to have opposite gender leaders in each group
 - 3) Ideal group size 8 (+/- 2) participants and 2 leaders
- vi. Consider designating four faculty as core and four as alternates in case registrations are not great enough to financially justify an additional group
- vii. The Coordinator of Intensives must approve all faculty per the above guidelines before invitations are extended.
- viii. If there are credentialing candidates, the person selected to serve as an examiner of credentialing candidates will have supervisory status in the American Balint Society and be approved by the Credentialing Coordinating Committee to serve as examiner; this person will not be one of the faculty but will be present at the intensive specifically as examiner. Clarify

with Coordinator of Intensives the extent to which the ABS will cover the examiner's expenses. Also work with the CCC Chair regarding schedules, faculty and group assignments.

- d. Present proposal to ABS Council for approval in a letter (Atch 7 – sample letter), including:
 - 1) Request for seed money, if necessary
 - 2) Proposed schedule for the intensive (Atch 6)
 - 3) Proposed budget (Atch 5) including break-even data for 2, 3 and 4 groups
 - 4) If applicable, any draft agreement with home or planning organization (Atch 1)
4. **T – 7 months**
- a. Invite intensive faculty
 - b. Remain in close contact with the Coordinator of Intensives
 - c. Obtain latest contact list from Coordinator of Intensives
 - d. Start advertising
 - i. “Save-the-date” notice for previous Intensive participants, Balint-L and other interested individuals and organizations (by email); (Atch 8 – sample “save-the-date” notice)
 - ii. Advertise locally
 - 1) Dept newsletter, email and/or web site
 - 2) Graduate lists
 - 3) Other potential attendees outside family medicine
 - e. Finalize schedule with Coordinator of Intensive’s approval
 - f. Apply for CME/CEU for physicians, as well as psychologists, counselors and social workers if at all possible.
 - i. See especially the AAFP CME application process (<http://www.aafp.org/online/en/home/cme/cmea/cmeapplying/group.html>) and template, (Atch 9) if local CME is too expensive
 - g. Set early registration and final cutoff dates in consultation with Coordinator of Intensives
 - h. Prepare brochure and e-brochure: (See PRG and Atch 10 for required wording and Atch 11 for suggested format for downloadable electronic brochure)
 - i. CME information can be included after approval by accrediting body
5. **T – 6 months**
- a. Send brochure to Coordinator of Intensives for review and approval before it goes out.
 - b. Coordinate with ABS Webmaster and Treasurer to set up online registration and payment mechanisms.
 - i. Prepare announcement to be posted on the web (Atch 12 – Web announcement)
 - ii. Send to the ABS webmaster.. Prepare a PDF or other easily handled file of the registration portion of the brochure to post on the web, linked from your announcement on the web. This allows those who have to apply for funding to have something tangible to use as early as possible to submit their request for funding. Send to the ABS Webmaster after review by the Coordinator of Intensives. (Atch 13 - Web Registration Form Template)
6. **T – 5 months**
- a. Email or snail mail brochures
 - b. Distribute extra brochures as desired to:
 - i. Intensive faculty
 - ii. ABS Council
 - iii. Presenters at other conferences, workshops, etc.

- iv. Others who have expressed interest
- v. Local
 - 1) Other programs
 - 2) Local graduates
 - 3) Local faculty
 - 4) Other potentially interested parties

7. T – 4 months

- a. Arrange to receive ABS cameras if using. Locate local operator help, if needed.
- b. Set up registration spreadsheet in format provided. You may add extra columns to the right if desired (Atch 14 – registration template)

8. T – 3 months

- a. Acknowledge registrations as they come in (via email); clarify irregularities, omissions and indecipherable information
- b. Revise budget as applicable

9. T – 2 months

- a. EARLY REGISTRATION CUTOFF DATE
- b. Begin faculty teambuilding via email
- c. Reserve hotel rooms for faculty
- d. Adapt evaluation sheets (Atch 15 – daily and summary evaluation templates)
- e. Gather syllabus material, asking faculty for recommendations
- f. Build syllabus

10. T – 1 month

- a. FINAL REGISTRATION CUTOFF DATE
- b. With Coordinator of Intensives, determine whether the Intensive will take place, based on number of registrations and financial risk.
- c. Confirm menus
- d. Gather local information and promotional material
- e. Prepare CME paperwork and materials for registrants
- f. Email attendees for content suggestions for small-group topic sessions
- g. Divide registrants into heterogeneous small groups by gender, professional role and experience, taking into account co-leader attendees, credentialing candidates and their supervisors.
- h. Inform faculty of proposed small groups/registrants; ensure no conflicts with faculty/attendee groupings
- i. Print syllabi (include a few extra copies) and name tags (over-the-neck recommended)
- j. Syllabus should include, but is not limited to:
 - i. Welcome Letter
 - ii. Schedule
 - iii. Faculty List
 - iv. Small Group List
 - v. Faculty Contact Information
 - vi. Registrants Contact Information (It may be helpful to print contact info list for attendees to initial and approve at registration. Revise and distribute to all after corrections.)

- vii. Selected articles with table of contents
- viii. Evaluation Forms (color-coded by day)
- k. If using videographer, review precise video recording procedure and schedule with videographer (Atch 16, 17)
- l. If using ABS cameras, review procedures and test/trouble-shoot equipment with those who will operate the cameras and playback equipment (Atch 17)

11. INTENSIVE

- a. Meet with faculty in the morning prior to the afternoon start of the intensive
 - i. Directions to faculty
 - ii. Review schedule
 - iii. Housekeeping
 - 1) Location of rooms/groups
 - 2) Plan for video recording
 - 3) Location of topic discussion sessions
 - 4) Location of faculty meetings
 - 5) Evening/off-time activities
 - iv. Decide on approach to small group discussion topic sessions and decide on faculty pairings for these sessions
 - v. Remind faculty to collect evaluations at the end of each day and for faculty to remind participants to indicate their small group on each day's evaluation
 - vi. Provide some time for faculty co-leaders to meet together, and remind them that there will be time during each subsequent faculty meeting for co-leaders to meet to discuss their co-leadership
- b. Intensive opening – large group
 - i. Introduce host, faculty
 - ii. Invite all attendees to very briefly introduce themselves and their relationship to Balint work
 - iii. Areas to cover (if possible, ask other faculty to present some of these topics, esp. 11-13)
 - 1) Emphasize confidentiality
 - 2) Contents of syllabus
 - 3) Review schedule
 - 4) Remind them about CME sign-in
 - 5) Remind them about evaluation forms needing to be turned in at the end of each day
 - 6) Location of where each group meets
 - 7) Location of where topic discussion groups meet
 - 8) Location of break area and restrooms
 - 9) Extracurricular activities/options, including group meals, free time
 - 10) Remind folks to get to know those outside of their small group
 - 11) Make sure attendees initial or correct and initial their contact information. Correct the master and distribute copies of this list on the second day, if applicable.
 - 12) If there are credentialing candidates, explain that this is happening and a bit about the process (without identifying specific candidates)
 - 13) Brief history of Balint groups
 - 14) Brief discussion of Balint group process
 - 15) Balint ground rules
- c. Meet with faculty at the end of each day (published schedule should indicate/include this meeting)

- i. Give each co-leader pair time to meet together to discuss their co-leadership and any issues in their group (Faculty pairs checklist may be helpful for new leaders especially - Atch 18)
- ii. Faculty review their own group members' evaluations
- iii. Host reviews all evaluations
- iv. Discuss any issues that have arisen that day, if necessary, with another faculty member or host chosen as consultant.
- v. Assess how intensive is going; any mid-course corrections?
- vi. Decide discussion topics and faculty pairings for Saturday
- d. Ensure that someone obtains attendee/faculty signatures for CME credit
- e. End of Intensive-Closure
 - i. During the last small group closure session, explain intent to contact group members afterwards, individually, to follow-up (leave it open to individuals to let the group leader know off-line if they do not want to be contacted)
 - ii. At large group session, provide information re:
 - 1) ABS
 - 2) Membership
 - 3) Committees
 - 4) Balint-L
 - 5) ABS web site, Wiki
 - 6) IBF
 - 7) Balint weekends
 - 8) Next intensive
 - 9) Credentialing
 - 10) Supervision
 - 11) Reintegration into everyday life (Atch 19)
 - iii. Make sure evaluations are completed and turned in:
 - 1) Overall conference evaluation (Atch 15, pages 5, 6)
 - 2) Faculty evaluations by group members (Atch 20)
 - 3) Any local conference evaluation forms, if applicable
 - iv. Remind them to turn in their evaluations and pick up their CME certificates
- f. Final faculty meeting
 - i. Review attendee evaluation forms
 - ii. Complete faculty evaluation of host form (Atch 21)
 - iii. Complete faculty coleader evaluation form (Atch 22)

12. T + 1 month

- a. Submit CE materials to organization that grants CE
- b. Prepare final accounting.
 - i. Determine level of reimbursement for faculty travel
 - ii. Reimburse cancellations if appropriate
 - iii. Settle accounts with ABS treasurer (seed money reimbursement + collected ABS dues + at least 50% of profit)
- c. Summarize evaluations in electronic format (quantitative and qualitative)
- d. Send to Coordinator of Intensives:
 - i. Syllabus or e-syllabus
 - ii. Evaluation summaries
 - iii. Final financial accounting

- iv. Faculty evaluations (by member, coleader and host)
- v. Small group list
- vi. Final registration list

13. T + 6 months

- a. Remind faculty members to communicate with members of their small groups (ongoing mentoring function)

Attachments

1. Sample joint sponsorship (third party) contract
2. Administrative support tasks
3. Sample template calendar
4. Hiring a videographer
5. Budget template
6. Sample schedule
7. Sample proposal letter
8. Sample “save-the-date” notice
9. Sample AAFP CME application form
10. Required statements for brochure
11. Sample email brochure format
12. Web announcement template
13. Web registration form template
14. Sample registration spreadsheet
15. Daily and summary evaluation templates
16. Sample Intensive Recording and Review Schedule
17. Intensive Video Camera Instructions
18. Faculty Pairs Checklist
19. “Balint State of Mind” - Jeff Sternlieb’s essay
20. Faculty evaluation by group members form
21. Faculty evaluation of host form
22. Faculty coleader evaluation form

REVISION DATE: 1/23/10