

Balint co-leadership: Suggested checklist for general preparation of new coleaders prior to leading a group together at Intensives

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- I. 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)
  - B. Discussion of co-leaders' theoretical orientation (e.g. psychodynamic, - e.g. psycho-analytic including which school, e.g. Jung, object relations, interpersonal, including which type e.g. Stack-Sullivan; Rogerian; Systems including which school – structural-Minuchin; Cognitive-Behavioral) Balint practices (calling for a case, pushing back or not, policy on pagers, late arrivals, interruptions, food ...)
  - C. Use of push-back technique – determined in advance by co-leaders
    1. always
    2. never
    3. sometimes
    4. when necessary due to specific aspects of case ? of case
      - a. presenter unable to disengage and to become reflective or;
      - b. group unable to allow this (e.g., with prolonged clarification questions)
  - D. Decisions about how to respond to unique cases ? (such as: deceased patient, student advisee as “patient”)
  - E. Hot button issues (such as one leader dealing with a personal loss or impending loss, illness, being sued)
    1. Develop a signal for the other to take over
    2. Have the other one aware in case the index co-leader only responds to it unconsciously as it appears in the group
  - F. Checking in with each other before group
    - i. Current mood, situation of each leader
    - ii. Remembering last presentation/case
    - iii. Group issues to remember
    - iv. Anything else
- II. Orientation at the beginning of the first small group session
  - A. Emphasis on ground rules: confidentiality/boundaries, taking responsibility, time, turn-taking
  - starting and ending on time, format\*\*
  - C. Parameters of cases (direct relationship with a patient, patient alive, continuity patient—this needs to be clarified between the leaders, but may not need to be spelled out to the group if leaders are ok with allowing these parameters)
- III. Co-leader meetings (deleted “during Intensive” here)
  - A. Debriefing Meeting

1. Duration: Approximately 30 minutes, after each session to discuss/review

- (a) the case, then group process;
- (b) then coleader interventions and interactions;
- (c) what else might have been happening at different levels of the group/systems;
- (d) what else could have been done, what else might be done next time
- (e) 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 sponsor.

- B. Before each day to review progression of cases/themes with regard to group development—“unfinished business” from group day before. Is co-leadership team functioning smoothly with good communication?
- C. Planning for management of challenging situations and how to address more vulnerable members; acting out; need for structural or other strategic intervention; consider opening group by asking members for within-group “unfinished business” from day before
- D. 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

III. After Conference (shortened title)

- A. Co-leader evaluation forms
- B. Brief meeting to process working relationship and who will take responsibility for emailing group members at 6 months post intensive