TOOL DESCRIPTION

Framework for Practical Casework

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Integrated Consulting Group

This tool is based on collegial supervision by Balint, a firmly established procedure for performing structured casework.

The goal of following this process is to help a person presenting a case (i.e., a person who is working on a change challenge) to better understand the system, the challenges and to find new ideas to solve problems, design change interventions and to increase their own options to act.

What makes this tool so special? It allows you to:

- Work on specific, potentially difficult situations and challenges.
- Obtain concrete support/extensions to the personal scope of action in the current situation or project.
- Exchange experiences with everyday situations in the project work/management work (active or passive).
- Discover the “power” of support from colleagues/participants who must manage the same or similar situations.
- Improve individual skills in the daily work.
- Prepare for upcoming change ambitions.

This method needs a strict facilitation by someone who cares that the group sticks to the rules.

Duration	Participants	Facilitation
50 min – 1.5 h	1 case bringer, 3–10 people	1 flipchart

SOURCE: *Michael Balint*

Framework for Practical Casework | **Process**

Introduction and case description 10–15 min	Asking questions to improve understanding 10–15 min	Formulating hypotheses 10–15 min	Feedback on hypotheses 5 min	Collecting ideas 10–15 min	Comments by case owner 5–10 min
The facilitator explains the steps of the process and rules for the case-work in question. The case owner introduces a case in 10–15 min. They should describe most important facts, the organizational contexts, challenges and social dynamics. The facilitator ensures the topical focus. At the end, the case owner formulates 1–2 questions they would like the group to answer.	Next, the group members interview the person who has presented the case. The goal is to gather insights from the group about the context, the challenges, the social dynamics and the role of the person presenting the case. For this reason, the group members should ask explorative “open questions” (why, where, who, when, …). In this phase, group members are not allowed to share their ideas, offer solutions or advice. No discussion is allowed.	The group generates hypotheses through a creative process. The case owner steps back as the group freely suggests ideas, and the moderator records these on a flip-chart. The case owner listens without interve-ning, focusing on follo-wing the group's com-ments. The emphasis is not on being "right" or "wrong”. All hypotheses are allowed, even crazy ones. In this phase, it is important for the case owner to be open to new perspectives about the case and for the group to generate helpful ideas in following steps.	The case owner then reads the group's formulated hypotheses and provides feedback (i.e., whether they agree or disagree with these). The case owner does not need to justify why they agree or disagree.	In this step, the group brainstorms on ideas for interventions or actions that could be taken by the case owner. In this creative process, the group focuses on the 1–2 explicit question formulated by the case owner at the end of step 1. The goal is not to achieve a mutual agree-ment on a single solution, but to present a range of options to the case owner. These ideas are recorded by the facilitator, while the case owner listens and receives inspiration from the group. The owner must be quiet, make their own notes and not discuss their views with the group.	The case owner rejoins the group and comments on ideas. They explain what’s new, attractive, too far outside the scope, etc. The group doesn't aim to convince the person who presents the case; instead, the focus is dir-ected toward illustrating various options and ideas without committing the case owner to a specific proposal. At the end, the group and person pre-senting the case reflect on the whole process and thank each other for the great learning opportuni-ty.