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