**STRUCTURED CASE REVIEW PROCESS**
*Sol Global Coaching Community (SoL GCC)*


**Structured Case Review Process**

**Information for the Organizer and Facilitator**

**Background**

See the *Information for Case Owner and Participants*.

**Checklist for Organizing a Meeting**

- Identify the Case Owner, set a date.

- Identify the participants. Invitations.

- Send *Information for Case Owner and Participants* and the Preparation Handouts to all.

- Confirm the meeting shortly beforehand

- Obtain agreement from the participants that the call is confidential.

**Facilitating During the Meeting**

- Welcome everyone. Manage the conference call facility or meeting space.

- Clarify roles:
    1. Case owner
    2. Facilitator
    3. Time Keeper

- Review the ground rules, modifying them as necessary and agreeing that all participants will follow them.

- Emphasize the importance of confidentiality and that the recording, if made belongs to the Case Owner.  No one else may copy or send to others the tape of the call.

- Lead a short check-in

- During the core of the process, keep everyone to the basic notion of each section of the conversation (first portion, everyone just listen, second portion, questions only, etc.)

- Lead a reflective debrief

- Remind everyone of the ground rules agreed upon

- Seek the case owner's  commitment to prepare and share a written case. Sharing could involve all of the call's participants in addition to us.*

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### After the Meeting

- Send a thank you to the participants.

- Reflect on your experience as an Organizer-Facilitator and let us* know any conclusions

- Follow-up with the case owner if he or she committed to create a case summary. Share the case summary with all the call's participants  as well as with  us*.

When we say "us" we mean the Structured Case Review Process Committee of the SoL Global Coaching Network, presently Richard Karash and Rita Kowalski.

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