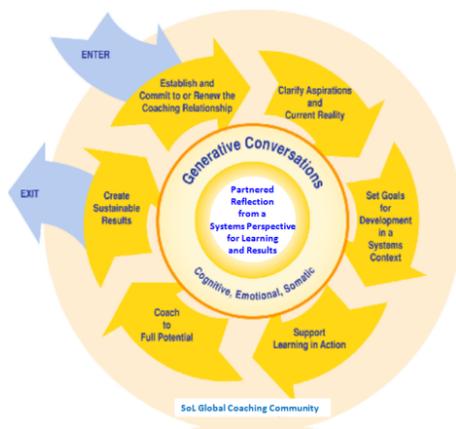


# Structured Case Review Process

## Information for Participants



## The SoL Global Coaching Community

# Our Coaching Model

**Our Coaching Model supports the SoL Global Coaching Community (SoL GCC) in developing the coaching skills and practices of our members.**



# What is the Structured Case Review Process?

- A short meeting, in-person, by phone, or by Skype about a case, brought by one of our peers.
- We all listen and then practice our coaching skills to help our colleague with his or her case, at the same time, we have our own reflections on our own practice, and strengthen our network as we learn together.

# Objectives

- Share our experiences and knowledge of coaching in order to help the person bringing the case
- Deepen our inquiry skills
- Learn by the reflections we experience
- Strengthen our network and enrich our practices by sharing stories, valuing and appreciating each other's work

# Prerequisites

- Trust — In sharing a story
- A mutual commitment to confidentiality of all details and specifics of the case
- A commitment to finding insight from the case

# Ground Rules — Agreed to in Advance

- We all commit to confidentiality of all the details and specifics of the case.
- These calls are not recorded, except that the case owner may make a recording for their own use.
- We all commit to learning. Subject to confidentiality, participants are free to use and share their learning.
- The case owner has the option to create a short summary of key points, reflective questions, and learning for the community as a whole.

# Structured Case Review Process

- **The Group:** *3 to 5 people*
- **Preparation:** Prior to the session, the Case Owner will prepare for his or her presentation.
- **Clinic Process:**

## Check-in

**Step One – Telling the Story, Clarifications, and Appreciation**

**Step Two – Reflective Questions**

**Step Three – Possible Actions and Alternatives**

## Check-out

# Case Owner Preparation

- Before the call, provide background information on the case for the group (optional).
- Be ready to:
  - \* **Describe the situation.**
  - \* **Identify the questions** that you would like to address in this group process
  - \* **Take notes** of the questions the group raises and the suggestions made during the team discussion.

# Process for the Meeting

## Step One – Telling the Story (15–20 Minutes)

- \* While the case owner tells the story, the other members of the group LISTEN and take notes.
- \* The other members will have 2 to 10 minutes to ask clarifying questions
- \* Appreciation for actions in the case

## Step Two – Reflective Questions (20–30 Minutes)

- \* Then, they will ask questions designed to stimulate reflection. (No discussion or offering of solutions.) The case owner will make notes on the questions, but case owner does not respond till later.

# Process for the Meeting (continued)

## Step Three – Identifying Possible Actions (20–30 Minutes)

- \* The entire group, including case owner, discusses possible actions and alternatives.
- \* Remember to practice and model inquiry throughout the process.
- \* The case owner makes a closing statement.

# Check-Out

**After the case dialogue, the group will reflect on the process:**

- \* What worked during the process?**
- \* What may have hindered?**
- \* What surprised us about the process?**
- \* What could we share from this session with the rest of our coaching community?**

# Case Summary

The case owner has the option to prepare a case summary to be shared in our coaching community. (See template)