

## Case Clinic Guidelines

### At a glance

Case Clinics guide a team or a group of peers through a process in which a case giver presents a case, and a group of 5-7 peers or team members help as consultants. Case Clinics allow participants to:

- Generate new ways to look at a challenge or question.
- Develop new approaches for responding to this.

Thus, the purpose of a case clinic is to access the wisdom and experience of peers and to help a peer respond to an important and immediate challenge in a better and more innovative way.

### Some principles

- Hierarchy does not matter in this group setting. All are equal peers
- The case giver owns the problem – I do not have to take over for him/her. As a peer I am listening and sharing my experience.
- We are thinking together as a group
- Set-up should allow for uninterrupted work environment

### Process steps

#### 1) Casting – distributing roles approx. 5 Min.

Select case giver and a facilitator/time keeper

**Case giver:** Shares his/her question/problem statement or challenge that is current, concrete, and important, and that he/she has a say in (e.g. we are working on a NAMA idea yet have no idea where to start with the stakeholder engagement).

Case giver should be able to present the case in approx. 20 min and the case should stand to benefit from the feedback of the peers.

**Coaches:** Listen carefully — do not try to “fix” the problem, but listen carefully to the case Giver. Share their experiences, their thoughts and new ideas

**Facilitator/Time keeper:** One of the coaches should be the facilitator who guides the group through the process and manages the time

#### 2) Intention statement by case giver approx. 20 Min.

Describe the current situation:

- What key challenge or question are you up against?
- What are you aiming for?
- What have you done so far?

- Where do you need input or help?

Coaches listen deeply and may ask clarifying questions (don't give advice)

**3) Defining a problem statement or question** **approx. 10 -15 min.**

Case giver and coaches should jointly define a question or problem statement that should be answered/be discussed – here the guiding principle is: the more precise the question is formulated the better the brainstorming and advice can be given.

After formulating a question or problem statement the facilitator should double-check with the case giver once more “will the answers to this question/problem statement help you? Is that what you are looking for”.

It is ok to take some time for this step as it will determine the discussion afterwards.

**4) Consultation from the coaches** **approx. 30 Min.**

**The case giver remains silent in this phase! He/she should just listen!**

The coaches brainstorm ideas/ solutions to this question or problem statement. They are discussing amongst themselves and one of the coaches writes the ideas down on a flipchart. This should be a creative process – it is not about agreeing what is the best solution or the one way forward yet a brainstorming of different ideas and options.

Case giver thanks all coaches for their ideas and inputs!

**5) Case giver selects ideas to further work on**

**approx. 15 Min.**

The case giver briefly reflects on the brainstorming session he/she followed in silence. This is not about “justification” (we have tried that already) or about “explaining” (we wanted to do this but...)

It is about a reflection of what he/she has heard. Which ideas or options are appealing?

Which are new? Which freshest thoughts have emerged?

**6) Group work on selected ideas/ processes/ options (given steps 4 and 5)**

Case giver and coaches now select ideas/ options/thoughts or a process which they would like to jointly work on in the next hours (e.g. designing an inclusive stakeholder engagement process or thinking through steps 1-5 of the NAMA process etc.)

- Here the NAMA steps might be used as guidelines
- Guiding questions on some NAMA process aspects might be helpful
- Maybe further input is needed

The thoughts and the work should be visualised (pin board) so that the case giver can use it afterwards. Furthermore, we will use this visualisation for a walk through gallery in the plenary on day 3 (afternoon)

**7) What is next**

Would be great to get to **step 5** on day 1

(Steps 1-5 can be achieved in 90 min.)

This part could be different in each sub-group.

Some might need input other might brainstorm etc.

After finishing step 6 the facilitator should ask the case giver “What is next” and ask to formulate 2-3 concrete next steps within the next weeks. These can be small or big steps depending on the case.

Afterwards the facilitator can extend the question to all coaches as well.

**8) Feedback and closing**

The group should take some minutes to provide feedback on the process of the case clinic. What worked well? What did they like? What would they recommend for another case clinic?

And they should close their sub-group with a round of appreciation or words of thanks.