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THE EVOLUTION OF BALINT LEADER TRAINING AND CREDENTIALING IN THE AMERICAN BALINT SOCIETY

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There has been a lot of international discussion about leadership, leadership training and the issue of credentialing Balint group leaders. One attempt to resolve these issues has been the development of Balint Leadership Training Intensives by the American Balint Society (ABS) and their subsequent use in a standardized process for credentialing leaders that has evolved over the past 11 years. The following is an account of this evolution, a brief description of the processes involved in training and credentialing leaders and an identification of both the accomplishments and challenges encountered in this ongoing attempt.

In 1994, the (British) Balint Society felt the need to create a statement identifying characteristics of a Balint group so that there would be some touchstone for continuing work that would be recognizable as Balint work¹. At about the same time, the ABS was concerned with identifying characteristics of Balint group leadership for a similar reason -- so that people could be trained to lead Balint groups which would be recognizable as Balint groups. "Balint leadership skills generally must be learned through direct observation of more experienced leaders. Where direct observation and training has not been available or sought, ineffective group leadership has sometimes dampened enthusiasm for Balint work. In addition, the lack of established characteristics of effective Balint group leadership has resulted in misconceptions about the process and goals of Balint groups...These problems have been obstacles to the further dissemination of Balint groups in the United States. Consequently, despite its popularity among those familiar with the Balint group method, the method's role as a tool for improving students' and practitioners' understanding of doctor-patient relationships has been underused."² Since the integrity of Balint work in the US depends on the availability of trained leaders, an effort was made to credential Balint leaders. The ABS believed that credentialing leaders would help them become recognized for their expertise by other professional bodies and institutions.

From its inception in 1990, the American Balint Society has offered training opportunities to those leading or intending to begin Balint groups, mostly at conferences held by other organizations. This process advanced with the ABS's creation of the first Balint Leadership Training Intensive in 1993. A 1996 ABS document, "Structure of a Balint Leadership Intensive"³ and its 2005 revision⁴, laid out principles, requirements and

guidelines to codify the training method and to ensure their continued quality and focus wherever Intensives were convened. Balint Intensives are held twice a year co-sponsored by institutions around the US, in a collaborative arrangement with the American Balint Society, administered by a Coordinator of Intensives and an Intensives Committee (established in 2004) which oversees the choice of faculty, training schedule and content, educational and promotional materials, budget and fiscal accountability, evaluation of the event and its faculty. The Balint Leadership Training Intensive is a practical, experiential learning opportunity. Much of the work is done in small ongoing groups, each led by two faculty. Each small group conducts nine Balint group sessions, with opportunities for participants to lead or co-lead sessions and receive feedback. Each group videotapes a Balint group session and reviews it. In addition, critical issues of Balint work are addressed during topic-focused discussions. Learning objectives include: identifying the verbal and non-verbal leadership behaviors of Balint group leaders; analyzing the effectiveness of different leadership interventions; understanding the progress and progression of a Balint group as a leader and as an observer; evaluating the success of the group in addressing the presenter's dilemma; defining any new perspective achieved for the presenter as a result of the Balint group process. All faculty members are credentialed as Balint Group Leaders by the American Balint Society. To date 28 Balint Leadership Training Intensives have been held to very positive participant evaluations (quite a few folks are repeat attenders) and financial success.

Intensives were being held regularly, when, in February of 1999, a group of experienced Balint group leaders gathered at a pilot leader credentialing workshop, convened by the ABS, to lay the groundwork for what would become the criteria and process of credentialing leaders. . The purposes of this workshop were to (1) identify the variables associated with quality Balint leadership, (2) explore how these variables would be recognized, (3) devise how to evaluate leaders and provide feedback to them in a timely, formative fashion. Participants divided into groups and conducted seven Balint groups each followed by oral and written feedback focused on the leader's behaviors. Two parallel focus groups were also held to evaluate the process used for credentialing and to identify the essential skills of leadership, how they could best be recognized, recorded and nurtured.

Results were positive and in July 1999 "Credentialing Procedures for Balint Seminar Leaders⁵" was passed by the ABS outlining several pathways to becoming a credentialed Balint leader. Mirroring the 1994 (British) Balint Society statement that a leader is defined as one "who has attended Balint groups and has had some training in small group leadership, ideally to include co-leading with an experienced Balint-leader and/or attendance at the Balint Society group-leaders' workshop¹," the ABS required candidates to: have Balint group experience as a participant or formal group training; be actively leading Balint groups that are debriefed with an ABS credentialed co-leader or receive regular supervision via tapes or transcripts from an approved ABS supervisor and, in all cases, attend and demonstrate their leadership skills at a Balint Leadership Training Intensive which then became their Credentialing Intensive.

"A Credentialing Intensive is an Intensive at which one or more persons who have completed supervision and attended the prerequisite number of Intensives are ready to be

evaluated as a Balint group leader.⁶ During their Credentialing Intensive, a candidate is evaluated while leading his/her Intensive group twice. The person designated as evaluator explains the process to the candidate's group, observes groups led by the candidate and conducts a debriefing which is meant to reveal the leader-candidate's understanding of the case, the group process and the effect of their own interventions. The evaluator also elicits feedback for the candidate from his faculty group leaders and group members, provides his/her own feedback on the candidate's leadership and collects written feedback on standardized forms. At the end of the Intensive the evaluator, candidate and two faculty leaders meet to give more summative feedback of the candidate's performance as a leader at the Intensive. The evaluator provides a report to the Credentialing Coordinating Committee, which then reviews all data on the candidate and makes a recommendation to credential or not to the ABS Council for their final approval.

Since 1999, 12 Credentialing Intensives have been held resulting in 52 credentialed leaders. In order to track, coordinate and administer the credentialing process, in 2000, the ABS created a standing committee charged with reviewing the credentials and nominating candidates for credentialing to the Council of the ABS. This Credentialing Coordinating Committee (CCC) also monitors and administers the credentialing process, including supervision. Five members, who must be credentialed leaders, are elected by the Council, two of whom are the Coordinator of Intensives and Coordinator of Supervision. The ABS President attends as a non-voting ex-officio member. One of the CCC's initial tasks was to document "The Organization and Procedures of Credentialing Intensives," passed by the ABS in 2003, which specified the process of evaluation, the roles of Intensive faculty, evaluator and candidate's group members, and the procedures for granting credentialing. Evaluation forms and guidelines for oral feedback used in this process were also refined. While certainly an anxiety provoking experience for the candidate, most find it to be a supportive process and other Intensive participants find that the process furthers their learning of Balint leadership skills while offering the candidate helpful feedback. The ABS has had to work on ways to fund the evaluative function of a credentialing intensive and work with Intensive hosts, to integrate the credentialing process into the Intensive without diminishing the experience for participants or overburdening the leader-faculty.

Unless they are co-leading with a credentialed Balint leader, candidates need to complete a course of supervision by an approved Balint Supervisor, usually 6 sessions per year for two years. The CCC sets annual fees for supervision, part of which goes to the supervisor and part to the ABS. Supervisors complete evaluation forms after every supervisory session which they share with their supervisee and send to the CCC. These reports become part of the documentation reviewed when the CCC decides whether a candidate is ready for credentialing. Supervisors are credentialed leaders who have been faculty at an Intensive at least twice; are actively leading Balint groups or serving as faculty at Intensives; demonstrate certain skills, knowledge and attitudes and have good evaluations from the hosts, group members and co-leader at the Intensives where they served as faculty. Those wishing to become supervisors submit an application to the Coordinator of Supervision who collects and presents the above documentation to the CCC with a recommendation for approval which must be ratified by the ABS Council. Supervisors must agree to participate in a meta supervision group conducted by the Coordinator of Supervision. The ABS website maintains a list of approved Supervisors

from which applicants for credentialing can choose. To date, there are 18 approved Balint Supervisors.

The process of creating methods of leadership training and credentialing in the ABS has been one of; borrowing from our colleagues in the (British) Balint Society, experience and experimentation, followed by formalizing and documentation, refinement and finally institutionalization. It has certainly been a learning process as we scurried to create policies and procedures for; supervision and credentialing appeals or grievances, to avoid getting sued, for credentialing co-leaders, operation of the Credentialing Coordinating and Intensives Committees, fees for credentialing and supervision, a practical guide for holding Intensives, etc. Not to mention creating forms—application, evaluation, supervision forms.

More significantly, in the process of creation we have encountered some issues that have fundamentally challenged our view of ourselves and our mission as Balint leaders, teachers and a Balint Society. Initially, the Council struggled with trusting the CCC they had created to make decisions such as; who to accept into the credentialing process, exceptions to the written requirements for certain candidates and decisions not to recommend a candidate for credentialing without Council input. Eventually, this was resolved through experience and the inclusion of the ABS President on the CCC as a non-voting member.

Maintaining confidentiality has been a recurrent issue, especially when there is a negative decision about a leader applicant or candidate in the credentialing process and giving feedback would not only be desirable but would be required by the applicant/candidate. We struggle to be inclusive and to teach but also to protect by not training or credentialing leaders who will hurt participants or greatly endanger the reputation of the Balint group process by their practice.

Applicants for credentialing come with various types and amounts of past experiences and deciding what and how to credit this experience toward the requirements has been an issue. Applicants and candidates are leading groups in all kinds of settings, many struggling to maintain viability in an age of budget and time crunching in academic institutions. This can affect the frequency and participation requirements of the candidate's group, often in their process of becoming credentialed. Supervision of co-leaders can be tricky since each has to “show their stuff” for the supervisor to coach and evaluate them. Though they work together, they have to be able to lead a group virtually on their own at their credentialing intensive.

Finally, we know that the voluntary, motivated group members a credentialing candidate confronts at an intensive are often easier to lead than the ones at their home training institutions, calling into question whether demonstrating their leadership skills at a credentialing intensive is a true test.

After 10 years of experience with leader credentialing, we are now confronting the issue of how leaders should maintain their credentialing (continuing education) and their connection to the ABS. We continue to work on supervisor development, focused on whom to include and how to manage our meta-supervision group.

After over 15 years experience conducting Balint Leadership Training Intensives, we are confident that participants leave with a better understanding of the Balint group process, what it is and isn't, and a set of skills they have begun to develop as leaders. Repeated attendance at Intensives and practice with feedback is required to reliably

perform essential leadership skills, but for most of us this is an ongoing development. After 10 years experience with credentialing we have seen people grow in their ability to lead and are confident that for the most part we have credentialed “good enough” leaders, whom we hope will continue to practice, grow, learn and teach. What we don’t know, and are currently in the process of examining, is whether we are doing the best we can. In creating Intensives and Credentialing we identified both as “works in progress,” which they continue to be. Periodically, we must look back to see if what we created so far is truly on the right track. Initially, the ABS believed that credentialing leaders would help them become recognized for their expertise by other professional bodies and institutions and there would be a demand to be trained and credentialed. However, the number of credentialed leaders and candidates is not large and although Intensives go on successfully twice a year with eager participants, the demand has not increased significantly.

At the same time, we are aware that other country’s Balint Societies have been struggling with the same issues we have and working to create some sort of structure for Balint group leadership development. As far back as the early 1970’s, group leaders workshops were started in London after Michael Balint’s death. There was a shortage of analysts wanting to lead groups and Michael had always insisted that no-one else could do the job. However, Enid thought that a GP who had been in a group led by analysts could be trusted to lead a group but would need some support and supervision. The workshops were led by Enid Balint until her death and were held about every 2-3 months. Leaders were expected to prepare a transcript of one their groups sessions and circulate it to members before the meeting. These workshops continue to be held about 4 times a year but no longer require transcripts. They work more like an ABS 'metaBalint' group in which a leader or leaders talk about their group, their successes and problems. The workshop is sympathetic, supportive and occasionally challenging. New group leaders find it very helpful.⁷ Recently, the 2009 International Balint Congress in Romania formed the IBF Leadership Task Force which has been working to push forward the discussion, exchange ideas around leadership and develop an every two year conference on leadership. The first of these Leadership conferences will be held in the Spring of 2011 in Copenhagen, with subsequent ones being held in the fall of non-IBF Congress years, beginning in 2012. As a part of this discussion, we will highlight the work of the Task Force and the first Leadership conference in Copenhagen.

We invite the addition of other country’s experiences to this presentation and open the floor to discussion.

¹ Sackin P, Elder A, on behalf of the Balint Society, What is a Balint-group? Journal of the Balint Society 1994, vol. 22, p. 36-7.

² Johnson A, Nease D, Milberg L, Addison R. Essential Characteristics of Effective Balint Group Leadership. Family Medicine 2004; 36(4): 253-9.

³ Johnson A, et al. Structure of a Balint Leaders’ Intensive for the American Balint Society 1996.

⁴ Sinclair A, Addison R, et al. Principles, Requirements and Guidelines for hosting the Balint Leadership Training Intensive. for the American Balint Society. 2005 American Balint Society Wiki; www.americanbalintsociety.org

⁵ Johnson A, Dornfest F, Milberg L. Credentialing Procedures for Balint Seminar Leaders. for the American Balint Society. 1998 revised 2010 Lichtenstein A. American Balint Society Wiki; www.americanbalintsociety.org

⁶Johnson A, Milberg L. Organization and Procedures of Credentialing Intensives. for the American Balint Society. 2003. American Balint Society Wiki; www.americanbalintsociety.org

⁷ Salinsky, J. personal communication to the author, 2011.