

The Case Study: Grappling with Real-World Issues While Developing Skills

Timing:	10-15 minutes
# of Participants:	Any number
Equipment needed:	Flipchart and markers

PURPOSE/DESCRIPTION:

This session is about *setting a collective intention* for the case/issue aspect of the workshop. It also frames the process of working the issue as well as learning about the tools, and sets the parameters for how the group will accomplish these outcomes.

GENERAL NOTES:

Sometimes in a workshop, the particular issue that the group will focus on has a champion or group of champions in the room. If that is the case, ask them in advance if they are willing to present the issue to the group. If so, tell them that they need to give a factual view of the issue and set out the key creative challenges that the group will need to work on, some of the opportunities they can build on, and the constraints they will need to work within.

PROCESS:

1. Have the group sit in a circle, then present the following talking points:

- We have found that the best way to learn a new approach is by doing it. This workshop represents this way of learning. We will work on an important real-life issue.
- We have chosen an issue that each of you is connected to or plays a role in.
- Approach this issue as openly as you can. We want you to immerse yourself in it fully, because by doing so, you will experience the process “from the inside”. You will also reflect “from the outside”. As a result, you will build your capacity and increase your effectiveness in your home setting.
- We will use a metaphor to help maintain the flow of the workshop. When the group is working on the substance of the issue, we say that it is “on the ballroom floor” and “in the dance”. When we need to reflect or comment on the tools, we’ll ask you to step out of the action and come onto the “balcony”, where we can look down at “the dance” and debrief the process. We may periodically remind you that we are “in the dance” or “on the balcony” to help you better understand where to focus.

2. Write the focal question of the workshop on a flipchart and keep it visible throughout. Example: “How shall we address the challenges posed by climate change?”

3. Tell the group that the dance—the collective work on the chosen issue—is now beginning. Ask participants to listen carefully to the people presenting the issue, as they are providing important information that will inform the work. Have them listen for creative challenges, questions that don’t yet have answers, and opportunities and constraints.

4. Invite the champion (if there is one) to explain a bit about the issue. If not, you should present the issue.

5. At the end, summarize some of the issue's complexities to be sure that everyone in the group has picked them up.

Alternatively, if the case is something that everyone in the room really owns, participants can work together on mapping out the context of the case and the core questions.

Facilitator's Note: Throughout the workshop, remind participants whether they are currently in the dance or on the balcony. When they are in the dance, they should focus on the substantive issue that they are working to address. They should put aside process questions for the next balcony session. Keeping them in the dance can be difficult because participants naturally find their way to the balcony. They want to learn the tools. But they need to fully experience the richness of the dance to be able to effectively use the tools in their own work.

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