

Case Consultation Structure

Roles: Case presenter

Time keeper/facilitator

Notetaker (optional)

<p>Case Presentation</p> <p>5 minutes</p>	<p>Goal for presenter: To present a <u>specific</u> challenge, opportunity, or decision-point related to racial equity work you're doing in your foundation or community.</p> <ul style="list-style-type: none"> • What is the specific challenge or opportunity? ("In 1-2 sentences, my question is...") • Who are the key stakeholders? What are their perspectives? • What actions have you taken or are thinking about taking? • Are there any hidden issues you can think of?
<p>Clarifying Questions Q&A with presenter</p> <p>10 minutes</p>	<p>Goal for the group: To gather facts and information that will help you understand the challenge and complexities of the presented case. Avoid "why" questions or judgement/leading questions.</p> <ul style="list-style-type: none"> • Who are the key players? What are their formal relationships? Informal alliances? What have they said or done? • What has the presenter done so far? What have they decided not to do? What's the time horizon? • What would success look like to the presenter?
<p>Diagnostic Brainstorming Presenter mutes self and doesn't speak</p> <p>15 minutes</p>	<p>Goal for the group: To interpret what is happening, offer alternative interpretations, and illuminate new ways to understand the case. Don't give advice or make suggestions about action.</p> <ul style="list-style-type: none"> • What did you hear or observe? What does it remind you of? • What hidden or unrealized challenges or assumptions might there be? • If relevant, how has the presenter contributed to this issue? • What would success look like to stakeholders other than the presenter?
<p>Action Step Brainstorming Presenter still doesn't speak</p> <p>10 minutes</p>	<p>Goal for the group: To offer possible actions or experiments for the presenter to try and move the work forward.</p> <ul style="list-style-type: none"> • What are possible actions and next steps? What are specific and possible goals to work toward in the near future? • How might the presenter reframe the challenge or opportunity? • What internal learning or reflection might the presenter need to do? • What courageous conversations need to take place with others? What new partnerships or relationship shifts need to happen? • Are there any resources that might be helpful?
<p>Presenter Reflection</p> <p>5 minutes</p>	<p>Goal for presenter: Comment on what you've heard.</p> <ul style="list-style-type: none"> • What did you hear that was helpful or thought provoking? • What action steps might you undertake in the near future?

What Makes a Good Case Consultation?

Your case consultation should be...

RELATED TO RACIAL EQUITY

Because this is a community of practice focused on racial equity, your case consultation should be related to racial equity work that's happening in your organization, with your grantees, or in your community.

SPECIFIC AND TIMELY

The best consultations are specific challenges, opportunities, or decision-points that are happening soon and are within your sphere of influence. This helps the discussion remain concrete and tactical, which is helpful to all participants in the conversation. Try to avoid consultations that are too big in scope (e.g. "How does the homelessness system in my community need to change?") or theoretical (e.g. "How do I change how people talk about racial disparities in homelessness?") Hone in on what's timely and in your sphere of influence to make your question more specific.

AN ADAPTIVE CHALLENGE

Ron A. Heifetz wrote about two types of challenges: technical and adaptive. Technical challenges are easy to identify and often lend themselves to clear and quick solutions that can often be easily implemented. Adaptive challenges require changes in values, beliefs, relationships, and approaches to work. They are complex in nature, and people can often resist even acknowledging that an adaptive challenge exists. Adaptive solutions require new learning, experiments, and discoveries, and they can take a long time to implement.

One example (paraphrased from [this blog post by Vu Le](#)) is seeing that your board is not racially diverse and trying to add a few people of color to make it diverse. That solves a technical problem (lack of diversity), but not the adaptive challenge, which is figuring out why people of color aren't on the board in the first place and how to shift that culture and power dynamic. To get the most out of your case consultation, consider: what's the adaptive challenge at play?

Presenting your case

You have five minutes to present your case to your home team, so spend some time thinking through how to keep your case succinct. One possible structure could be (but please tweak this as is needed for your specific case):

- What is the scope of your case and the challenge or opportunity? (Is it internal in your organization, related to a grantee, or involving the community?)
- What's the main issue? Who are the key players involved?
- What have you done or what are you thinking of doing?
- End with: "My question is..."

If you feel like there is additional context that your group would benefit from knowing that would take more than 5 minutes to share, please 1) think through whether it's truly needed for the scope of your case, 2) consider putting together a written paragraph or two with that historical context that folks can read in advance.