



**Agenda Day One – January 11, 2019
9:00 a.m. to 5:00 p.m. (Lunch 12:30 to 1:00 p.m.)**

Objectives: By the end of Day One, learners will:

- Have a conceptual understanding of the Collaborative process;
- Differentiate the Collaborative Family Law team approach from other alternative dispute resolution methods including practicing “collaboratively”;
- Explain the specific progression of the case through the Collaborative Roadmap;
- Describe the distinct roles of the lawyer, mental health professional, and financial professional in the interdisciplinary Collaborative Family Law Model;
- Have strategies for discussing the Collaborative process in an initial client meeting and differentiating the process from other options;
- Have methods for starting a Collaborative Family Law case (i.e., selecting a team, deciding the order of steps, conducting a team telephone call, creating forms for the process, preparing an agenda for the first meeting, establishing client goals, obtaining professional fees, taking meeting notes, etc.)
- Develop an understanding of the purpose of using an interdisciplinary team, neutrality and the use of neutrals in Collaborative practice;
- Understand the Participation Agreement and associated documents;
- Develop an approach to moving forward in the process and understand the steps and stages in the Collaborative process including moving from interests to solutions;
- Develop skills to identify client interests (incl. each lawyer understanding other client’s interests)

9:00 to 9:30 Welcome and Introductions

- Welcome to the Collaborative community!
- Who are we? Who are you?
- Burning Questions: What do you hope to get out of this training?

9:30 to 10:30 Introduction to the Collaborative Process – (PowerPoint Page 4)

- The magic is in the process
- Client Feedback-Video: Lionel and Sally
- So what is Collaborative Practice?

10:30 to 10:40 Morning Break

10:40 to 11:10 The Collaborative Roadmap- (PP Page 12)

- Whiteboard demonstration: Illustrating the stages of the process

11:10 to 12:30 The Neutral Interdisciplinary Approach (PP Page 16)

- Define the core collaborative team roles
- Advocacy role versus neutral roles

12:30 to 1:00 Lunch (provided): Please return from lunch to the room for your discipline.

1:00 to 1:45 Understanding Your Role in the Process by Discipline-Part 1

- Break-Out by discipline: Speaker facilitated discussion
 - Discuss discipline specific role in the interdisciplinary Collaborative process
 - Discuss developing client Interests

1:45 to 2:30 How to Get Started: The Initial Individual Client Meeting – (PP Page 53)

- Video: Lawyer/client meeting - Meet Dan
- Debrief: Whole group discussion
- The initial client meeting with the neutrals
- Are all cases appropriate for Collaborative?

2:30 to 3:00 How to Get Started: Yes to Collaborative, Now What? – (PP Page 62)

- Contacting the other client or lawyer
- Picking the team
- Deciding the order of steps
- Live Demonstration: First team telephone call – (SPage 11)

3:00 to 3:15 Afternoon Break

3:15 to 3:40 Preparing for the First Team Meeting – (PP Page 74)

- The Documents
 - Collaborative Participation Agreement – **SPage 12**
 - Written Communications Agreement - **SPage 20**
 - Lawyer Engagement Agreements – **SPage 22 and 26**
 - MHP Engagement/Agreement - **SPage 29**
 - FP Engagement/Agreement - **SPage 33**
 - FP Introductory email - **SPage 37**
 - FP Financial Document Checklist – **SPage 28**
 - ED worksheet sample for First Full Team Meeting – **SPage 39**
 - First Meeting Agenda – **SPage 41**
 - Roadmap to Resolution Client Handout - **SPage 43**
 - Expectations of Conduct Client Handout - **SPage 44**
- Client preparation for the first team meeting
 - Client understanding of the documents/Client interests and goals
 - Additional client meetings with lawyer, financial, and mental health

3:40 to 4:50 First Full Team Collaborative Meeting – (PP Page 81)

- The 6-Way Team Meeting
- Video: A First 5-Way Team Meeting with Dan and Rachel
- Debrief: Whole group discussion

4:50 to 5:00 Wrap-up Day One – (PP Page 86)

- Homework: **Read SPages 50 – 129**

Agenda Day Two – January 12, 2019
9:00 a.m. to 5:00 p.m. (Working Lunch 12:30 to 1:15 p.m.)

Objectives: By the end of Day Two, learners will:

- Describe the importance of anchoring the process with the Participation Agreement and associated documents;
- Use those anchors and dimensions of interest to avoid impasse;
- Demonstrate how a professional team works together to address client needs during the divorce process;
- Identify the basic structure of Collaborative negotiation;
- Demonstrate team-building skills with respect to clients and colleagues;
- Apply techniques to address client challenges (i.e., excessive anger, domestic violence, substance abuse, mental illness, attempts to hide assets, etc.) and professional team member challenges (i.e., lack of respect for the process, unavailability, non-responsiveness to communication, positional bargaining, etc.);
- Consider ethical issues: integrity, professionalism, diligence, competence, confidentiality;
- Discuss the need and relevance of ethical guidelines for each discipline;
- Review the elements of the IACP Ethical Guidelines for Collaborative Practice;
- List the specific boundaries and ethics common and unique to each profession and the considerations these pose when working together as a team;
- Analyze the interpersonal and professional aspects unique to interdisciplinary work;
- Recognize the key elements to bringing a Collaborative case to closure;
- Recognize methods and opportunities to expand the provision of the Collaborative process to clients with limited financial resources;
- Understand Barry University School of Law's Collaborative Clinic program sufficiently to volunteer as a team member;
- Identify the importance of local practice groups, develop awareness of the global community and IACP's role in advancing Collaborative practice worldwide;
- Discuss Florida "Collaborative Practice Act," Rules and Procedure.

9:00 to 9:20 Questions from Day One

9:20 to 9:45 Special guest: The Judicial Perspective

9:45 to 10:45 The Middle of the Process: Nuts and Bolts – (PP Page 88, SPage 45 - 49)

- Interactive Q&A: What do subsequent meetings look like?
 - Preparation of the client
 - Pre-meeting and debriefs
 - Agendas
 - Scheduling
 - Pacing of meetings
 - Meeting minutes
 - Off line meetings
 - Communication
 - Completion of tasks

10:45 to 11:00 Morning Break

11:00 to 12:30 The Middle of the Process: Applying Standards and Ethics – (PP Page 92; SPage 57)

- Common ethical dilemmas and where to look for guidance
- Managing client challenges such as excessive anger, domestic violence, substance abuse, mental illness, attempts to hide assets, etc.
- Break-Out: Small group activity applying ethical guidelines to cases
- Debrief: Whole group discussion

12:30 to 1:15 Working Lunch (Lunch provided) Interdisciplinary Team Building Exercise

1:15 to 1:35 The Middle of the Process: The Role of the Allied Professional – (PP Page 97)

- What is an ‘Allied Professional’?
- How do they interact with the team and clients? Are they part of the Team?

1:35 to 2:15 Understanding Your Role in the Process by Discipline-Part 2

- Break-Out by discipline: Speaker facilitated discussion
 - Ethical conflicts or concerns within discipline
 - Tasks and goals for client meetings throughout the process
 - The use of Allied mental health, financial, and legal professionals

2:15 to 2:45 The Middle of the Process: Working Together as a Team – (PP Page 101)

- The impact of the paradigm shift on the middle of the process; Managing professional team member challenges
- Break-Out: Interdisciplinary small group exercise

2:45 to 3:20 The Middle of the Process: Working Together as a Team – (PP Page 119)

- Avoiding and breaking impasse (i.e., effective brainstorming, educated clients, refining client interests, the toolbox approach, managing emotions, remembering “Getting to Yes”, second opinions, joint presentation of the law, mediation, etc.)
- Video: “Wife Wants to Introduce Son to Boyfriend”

3:20 to 3:30 Afternoon Break

3:30 to 3:45 Debrief Practice for “Wife Wants to Introduce Son to Boyfriend”

3:45 to 4:00 Case Closure: Ending As We Began – (PP Page 140)

- Timely preparation of documents
- The Full Team signing meeting

4:00 to 4:15 Access to Collaboration: A Worldwide Concern – (PP Page 146; SPage 92)

- Barry Collaborative Clinic

4:15 to 4:30 The Collaborative Community – (PPage 148)

- International organization - International Academy of Collaborative Professionals
- Statewide organizations including The Florida Academy of Collaborative Professionals
- Local Practice Groups including The Collaborative Family Law Group of Central Florida
- Advanced training opportunities

4:30 to 5:00 Wrap up and Good Bye

- Back to the burning questions/Take away activity/Evaluations