



**Agenda Day One – August 23, 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 team, deciding order of steps, conducting a team telephone call, creating forms for the process, preparing agenda for meetings, establishing client goals, obtaining professional fees, taking meeting notes, etc.);
- Recognize necessary changes in training of all office staff and in office procedures
- 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. lawyer understanding other client’s int.)
- Recognize key elements of Florida Collaborative Practice Act/Rules of Procedure/Professional Conduct.

**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 10:45 Morning Break**

**10:45 to 11:15 The Collaborative Roadmap- (PP Page 12)**

- Whiteboard demonstration: Illustrating the stages of the process

**11:15 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
  - 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 – and Debrief Video: 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 – (**Supplementary Materials Page 10**)

**3:00 to 3:15 Afternoon Break**

**3:15 to 3:45 Preparing for the First Team Meeting – (PP Page 74)**

- Florida Collaborative Practice Act/Rules of Procedure/Professional Conduct
- The Documents
  - Collaborative Participation Agreement – **SMPage 12**
  - Written Communications Agreement - **SMPage 20**
  - Lawyer Engagement Agreements – **SMPage 22 and 26**
  - MHP Engagement/Agreement - **SMPage 29**
  - FP Engagement/Agreement - **SMPage 33**
    - FP Introductory email - **SMPage 37**
    - FP Financial Document Checklist – **SMPage 28**
    - ED worksheet sample for First Full Team Meeting – **SMPage 39**
  - First Meeting Agenda – **SMPage 41**
  - Roadmap to Resolution Client Handout - **SMPage 43**
  - Expectations of Conduct Client Handout - **SMPage 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
  - Paralegal or other staff role - communicating w/ client/document prep/scheduling

**3:45 to 4:30 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

**4:30 to 5:00 Wrap-up Day One – (PP Page 86) and Homework: Read SMPages 50 – 129**

**Agenda Day Two – August 24, 2019**  
**9:00 a.m. to 5:00 p.m. (Working Lunch 12:30 to 1:00 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;
- Describe the role of the paralegal in the Collaborative 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, diversity;
- 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;

**9:00 to 9:15 Questions from Day One**

**9:15 to 10:45 The Middle of the Process: Nuts and Bolts – (PP Page 88, SMPage 45 - 49)**

- Interactive Q&A: What about the details? What do subsequent meetings look like? How are we integrating all professionals, staff, and allied professionals?
  - Preparation of the client
  - Pre-meeting and debrief
  - Agendas
  - Scheduling/Pacing of meetings
  - Meeting minutes
  - Off line meetings
  - Communication
  - Homework/Completion of tasks

**10:45 to 11:00 Morning Break**

**11:00 to 12:15 The Middle of the Process: Applying Standards and Ethics – (PP Page 92; SMPage 57)**

- Reconciling discipline specific ethics with interdisciplinary ethics
- Common ethical dilemmas and where to look for guidance
  - Whole Group Discussion: Apply ethical guidelines to cases

- Managing client challenges that create ethical dilemmas including domestic violence, substance abuse, mental illness, attempts to hide assets, etc.
  - Break-Out: Interdisciplinary small group exercise
- What about diversity and culture?

**12:15 to 12:30 The Middle of the Process: The Role of Allied Professionals (with guest speaker) – (PP Page 97)**

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

**12:30 to 1:00 Working Lunch (Lunch provided) Interdisciplinary Team Building Exercise**

**1:00 to 1:30 Understanding Your Role in the Process by Discipline-Part 2**

- Break-Out by discipline-lawyer, MHP, FP, paralegal (guest speaker), Allied
  - Ethical conflicts or concerns within discipline
  - Discipline specific tasks and goals for client meetings throughout the process
  - The use of allied mental health, financial, and legal professionals

**1:30 to 2:15 The Middle of the Process: Working Together as a Team – (PP Page 101)**

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

**2:15 to 3:00 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”

**3:00 to 3:15 Afternoon Break**

**3:15 to 3:30 Debrief Practice for “Wife Wants to Introduce Son to Boyfriend”**

**3:30 to 3:45 Case Closure: Ending As We Began – (PP Page 140)**

- Timely preparation of documents
- Paralegal Assistance in the closure process
- The Full Team signing meeting

**3:45 to 4:15 Access to Collaboration: A Worldwide Concern – (PP Page 146; SMPage 92)**

- Barry Collaborative Clinic, Streamlined Protocols, Modest Means, etc.

**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