



**Agenda Day One**  
**January 10, 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 be able to:

- Describe 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;
- Demonstrate strategies to discuss the Collaborative process in an initial client meeting and differentiate the process from other options;
- Explain to a client how a professional Collaborative team works together to meet the various needs of family members in this type of divorce process
- Analyze the pros/cons of using the Interdisciplinary Collaborative approach versus other family law options in cases with a history of interpersonal violence
- Articulate to victims of interpersonal violence the comparative pros/cons of this divorce approach when compared to other approaches for their situation
- State the specific steps 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
- State the purpose of using an interdisciplinary team, neutrality and the use of neutrals in Collaborative practice;
- Explain the key concepts of the Participation Agreement and associated documents;
- Utilize the Team Telephone Call Checklist to facilitate professional communication among team members
- Describe the steps and stages in the Collaborative process necessary to move from interests to solutions;
- State the importance of client interests to the success of the process
- Mental Health Professionals: identify the skills needed by the mental health professional to facilitate effective meetings that advance the Collaborative process and create a beneficial client experience, including directing small group meetings, facilitating difficult conversations, guiding interest-based discussions, addressing implied emotional content, etc.

- Recognize key elements of Florida Collaborative Practice Act/Rules of Procedure/Professional Conduct
- Identify appropriate technology methods for the initial phase of the Collaborative process

### **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? (incl. interpersonal violence)

### **2:30 to 2:45 Let's Get Started: Yes to Collaborative, Now What? – (PP Page 60)**

- Contacting the other client or lawyer; Picking the team; Deciding the order of steps

### **2:45 to 3:15 Technology Class 101 for Collaborative Lawyers – (PP Page 69)**

- What do we mean by technology? How can it influence Collaborative Process?
- Decisions for how to use technology in the process
  - Are the team members technology ready?
  - Are the clients technology ready?
  - Options (software, video or telephone conference)
  - Risks and Benefits

### **3:15 – 3:30 Live Demonstration: First team telephone call or video conference – (PP Page 73; Supplementary Materials Page 10 and 11)**

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

### **3:15 to 3:45 Preparing for the First Full Team Meeting – (PP Page 79)**

- 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 – how is it different?
    - communicating with client
    - document prep
    - scheduling

### **3:45 to 4:30 First Full Team Collaborative Meeting – (PP Page 85)**

- 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 89) and Homework: Read SMPages 50 – 129**



**Agenda Day Two**  
**January 11, 2020 - 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 be able to:

- Describe the importance of anchoring the process with the Participation Agreement and associated documents;
- Assist clients to develop interests (incl. lawyer understanding other client's interests)
- Use anchors and dimensions of client 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, substance abuse, mental illness, attempts to hide assets, etc.)
- Communicate effectively with team members to address client challenges such as allegations of interpersonal violence
- Employ techniques to address safety concerns related to past interpersonal violence
- Lead team discussion regarding current allegations of interpersonal violence and decisions regarding termination of the Collaborative process
- Apply techniques to address 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;
- Review the FACP Guidelines and Credentialing Program
- Discuss the specific boundaries and ethics common and unique to each profession and the considerations these pose when working together as a team;
- Mental Health Professionals: list relevant ethical codes for psychologists and other mental health professions who desire to participate in this model as a Neutral Mental Health Professionals
- Analyze the interpersonal and professional aspects unique to interdisciplinary work;
- Facilitate two team building exercises that can be used with Collaborative team colleagues to increase creative problem solving
- Facilitate one team building exercise that can be used with Collaborative team colleagues to increase creative problem solving regarding safety concerns when there are allegations of a history of interpersonal violence

- 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;
- Apply the Interdisciplinary Collaborative approach to clients of all income levels including low income clients through the Barry University School of Law's Collaborative Clinic program
- Identify the importance of local practice groups, develop awareness of the global community and IACP's role in advancing Collaborative practice worldwide;
- Identify appropriate technology methods for the middle to late phases of the Collaborative process
- Recognize confidentiality and security concerns as well as remedies for the technology methods available for the later phases of the Collaborative process

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

### **9:15 to 10:30 The Middle of the Process: Nuts and Bolts – (PP Page 93, SMPPage 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

### **10:30 to 11:00 Technology Class 102 for Collaborative Lawyers – (PP Page 98)**

- Use of technology for gathering, storing, and sharing client financial data
- Use of technology for Parenting Plan development
- Use of technology for note taking
- Ethical considerations for lawyers and neutrals: What do your ethical guidelines say about professional conduct when using technology?

### **11:00 to 11:15 Morning Break**

### **11:15 to 12:15 The Middle of the Process: Applying Standards and Ethics – (PP Page 103; SMPPage 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 interpersonal 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 109)**

- 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 130)**

- 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 144)**

- 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.)
- Difficult Conversation 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 151)**

- 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 156; SMPage 92)**

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

**4:15 to 4:30 The Collaborative Community – (PPage 158)**

- International organization - International Academy of Collaborative Professionals
- Statewide organizations including The Florida Academy of Collaborative Professionals
  - See you at the Statewide Conference May 21-23, 2020
- 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