COLLABORATIVE DISPUTE RESOLUTION PROFESSIONALS

Welcome to CDRP!

We are delighted to have you as a new member in our practice group! Our practice group is composed of professionals from different backgrounds who are all focused on and interested in helping couples and families manage the process of separation and divorce in a more positive and supportive way. We are so glad you have decided to be a part of our community.

To orient and support you in becoming a member of the Collaborative community, we have put together a New Member Packet. Below, is a list of the items in this packet and how each can be used.

Please reach out to any board member or any other member of our group if you have further questions. We are here to help.

- Resources to explain Collaborative:
    1. Divorce Process Options Chart: This document compares Collaborative vs. Mediation vs. Litigation on a number of factors to include role of attorneys, information sharing and control of the process and outcome.
    2. Divorce Process Options Graphic: This document compares Collaborative vs. Negotiation vs. Mediation vs. Litigation in terms of the relationship between the professionals and the clients.
    3. Talking Points on Collaborative: This document summarizes some of the most common reasons clients choose Collaborative and some of the most important distinctive and beneficial features of Collaborative.
    4. Flow Chart of Collaborative Process: This is a flow chart which outlines each step in the Collaborative process and can be given to clients and used to help explain the process steps overall. Some practitioners provide this to clients at the initial consultation and others provide it at the first team meeting. It can also be used during the process to remind clients where you are in the process.
    5. Flow Chart of Collaborative Meetings: This is a flow chart which helps to visualize the parallel processes to complete the parenting plan and the financial settlement. It also helps clients to understand where each professional is involved in the process and the rhythm of meetings as they participate in the process. Some practitioners provide this to clients at the initial consultation and others provide it at the first team meeting. It can also be used during the process to remind clients where you are in the process
- Engagement Agreements: These agreements are for individual professionals to formally engage with their clients in the Collaborative Process. There are agreements for each of the professional roles—Attorney, Individual Coach (2 coach model), Neutral Coach (1

coach model), Child Specialist, and Financial Neutral. These are the standard agreements that professionals in the DC Metro area use regularly.

1. Engagement Agreement for Attorney
2. Engagement Agreement for Financial Neutral
3. Engagement Agreement for Neutral Coach (1 coach model)
4. Engagement Agreement for Individual Coach (2 coach model)
5. Engagement Agreement for Child Specialist

- <u>Participation Agreement:</u>
    1. Standard Participation Agreement with Children: This agreement was drafted by a team of professionals in the DC Metro area and is the standard agreement used in Collaborative cases.
    2. Standard Participation Agreement without Children: This agreement was drafted by a team of professionals in the DC Metro area and is the standard agreement used in Collaborative cases.
    3. Addendum to Participation Agreement for Video: This agreement addresses additional provisions needed related to online video meetings.
    4. Standard Participation Agreement with Video Addendum, with Children: This is the Standard Agreement *with Addendum incorporated for cases with children*.
    5. Standard Participation Agreement with Video Addendum, No Children: This is the Standard Agreement *with Video Addendum incorporated for cases without children*.
- <u>Initial Meeting Documents:</u>
    1. First Professionals Meeting Checklist: This document is from the Protocols Resources for a Full Team Model. It outlines the issues that a new team may want to discuss in their first organizational meeting.
    2. Professional Team Organization Checklist: This document is from the Protocols Resources for a Full Team Model. It outlines the issues that a new team may want to discuss as they are preparing for how to manage the first full team meeting.
    3. Attorney-Client Preparation Checklist: This document is from the Protocols Resources for a Full Team Model. This document is designed to guide the attorney in what to cover with the client to be prepared for the first full team meeting.
    4. Sample Goals: This document can be shared with clients as a way to guide them to understand the purpose of sharing goals and provide them with some sample goals as a way to get started on creating their own goals.
    5. Sample Questions to be Answered: This document can be shared with clients or can be used as a template in a full team meeting. It outlines the most common questions that people list to be answered in the process.

6. Example Introductory Statement: This document serves as a "cheat sheet" to introduce the first team meeting to clients. It reminds clients that the Collaborative process tends to emotions and is supportive.
7. Summary of Participation Agreement Provisions: This document serves as a "cheat sheet" to guide professionals on what to highlight as the most important aspects of the Participation Agreement. This can be used in the first full team meeting when reviewing the Participation Agreement with the clients.
8. Flow Chart of Collaborative Process: This is a flow chart which outlines each step in the Collaborative process and can be given to clients and used to help explain the process steps overall. Some practitioners provide this to clients at the initial consultation and others provide it at the first team meeting. It can also be used during the process to remind clients where you are in the process.
9. Flow Chart of Collaborative Meetings: This is a flow chart which helps to visualize the parallel processes to complete the parenting plan and the financial settlement. It also helps clients to understand where each professional is involved in the process and the rhythm of meetings as they participate in the process. Some practitioners provide this to clients at the initial consultation and others provide it at the first team meeting. It can also be used during the process to remind clients where you are in the process
10. Pre-Meeting Client Review Checklist: This document is designed to guide the professionals on what to cover with the client to be prepared for the first full team meeting. It can be used by any of the professionals.
11. Sample Agenda for First Full Team Meeting: This document is a sample agenda that can be used as a template for the first full team meeting.
12. Reference Points: This document is from the Protocols Resources for a Full Team Model. It outlines the reference points for decision-making that we discuss with clients in the process. It is designed to encourage clients to consider many different reference points and view the law as only one of the reference points.

- <u>Protocols/Ethics/UCLA:</u>
    1. Protocol Resources for a Full Team Model: Collaborative Divorce, DC Metro Protocols Committee—These protocols were developed by members of our own community and have been updated over the years. They are intended to be a "how to" manual for conducting a full team Collaborative case. They define the roles of the team members, outline the steps in the Collaborative process, and address issues such as termination and withdrawal. They are a comprehensive tool that likely will answer many of your questions about the nuts and bolts of the Collaborative process.
    2. Ethics Guidelines for Collaborative Practice: DC, Maryland and Virginia—These protocols were developed by members of our own community and have been updated over the years. They are intended to address some of the most

common ethical issues faced by Collaborative practitioners. The guidelines break down each ethical issue within the context of jurisdiction (DC, MD or VA) as well as profession and provide supportive references for each determination.

3. Uniform Collaborative Law Act—This document contains the law that governs the use of Collaborative Law in Maryland. It outlines the requirements for a Collaborative Law case to include informed consent, the Participation Agreement, disclosure and when a Collaborative case begins and ends, and establishes the confidentiality of collaborative communications.
4. Uniform Collaborative Law Rules-This document contains the Judicial Rules that apply to attorneys practicing Collaborative Law in Maryland including the obligation to obtain informed consent, the right to stay litigation pending the collaborative process, and the disqualification of the collaborative attorney from contested litigation.