



Collaborative Practice Materials, revised 2008 edition, is the definitive procedures manual for collaborative practitioners. This 284 page manual includes forms useful for both attorney and interdisciplinary teams.

Chapters include:

- Initial Steps
- Agreements
- Process Framework
- Information Gathering
- Meetings
- Negotiations
- Completing the Case

See the back of this order form for a complete Table of Contents.

Order Form

Quantity:

1-5 copies _____ x \$50 each = \$ _____

6-10 copies _____ x \$45 each = \$ _____

11 or more copies _____ x \$40 each = \$ _____

Tax, Postage and Handling: _____ x \$10 each = \$ _____

Total: \$ _____

Make check payable to: *Collaborative Council of the Redwood Empire.*

Name: _____

Address: _____

Phone: _____

E-mail: _____

Please return to:

Joanne Richard
 Conner, Lawrence & Rodney
 829 Sonoma Avenue
 Santa Rosa, CA 95404
 (707) 523-0480
 fax (707) 523-2937
 email: jrichard@clr829.com

All proceeds support the activities of the Collaborative Council of the Redwood Empire.

COLLABORATIVE PRACTICE MATERIALS

TABLE OF CONTENTS

Preface

About the Authors

1. Introduction to Initial Steps

- Collaborative Practice Information
- Attorney's First Meeting with Client
- Informed Consent Checklist
- Client's Evaluation of First Meeting with Attorney
- Attorney's Report on First Meeting with Client
- Coach's Report on Introductory Meeting with Clients
- Conflict and Communication Assessment
- Letter to Spouse regarding Collaborative Process
- First Meeting of Collaborative Team
- Suggestions for Being an Effective Collaborative Team Member, Part 1
- A Narrative Approach to Preparing with Your Client for the Collaborative Process
- Collaborative Client Notebooks:
 - Collaborative Client Process Notebook - Table of Contents
 - How to Use Collaborative Client Process Notebook
 - Collaborative Client Documents Notebook - Table of Contents
 - Commonly Asked Questions About Getting a Divorce in California
 - Introduction to the Collaborative Process and the Legal Dissolution Proceeding

2. Introduction to Agreements

- Stipulation and Order re: Collaborative Matter
- Principles and Guidelines for the Collaborative Process
- Statement of Understanding for Collaborative Team Process

3. Introduction to Process Framework

- Map of the Collaborative Process
- Comparison of Modes of Dispute Resolution
- Comparison of Fees for Collaborative and Litigated Case
- Case Manager Checklist
- Guidelines for Communications Among Professional Team Members
- Viewpoints for a New Paradigm

4. Introduction to Information Gathering

- Attorney
- Client's Evaluation of Meeting with Attorney
- Letter to Expert/Consultant
- Confidential Information Questionnaire
- Property Checklist
- Asset and Debt Information Worksheet
- Property Worksheet and Sample Completed Worksheet
- Expense Worksheet and Cash Flow Analysis
- Authorizations for Release of Information to Both Attorneys
- Spousal Support Discussion Outline

Financial

- The Role of the Divorce Financial Analyst in Collaborative Process
- Financial Document Checklist
- Suggestions for Completing Budget Worksheet and Budget Worksheet
- Financial Specialist's Report on First Meeting with Clients
- Financial Specialist's Report on Meeting with Clients
- Client's Evaluation of Meeting with Financial Specialist

Coach

- Relationship History Questionnaire
- Client Goals List
- Client's Self Assessment of Emotions
- Coach's Report on First Individual Meeting
- Coach's Report on Individual Client Meeting
- Coach's Report on Coaches' Four-Way Meetings
- Client's Evaluation of Individual Coaching Session
- Client's Evaluation of Four Way Meeting with Coaches
- Coach's Report on Post Divorce Interview

Child Specialist

- Child Specialist Description
- Child Information Questionnaire
- Child Specialist's Report on Contact and Assessment
- Client's Evaluation of Meeting with Child Specialist
- Parenting Plan Worksheet
- Parenting Agreement Checklist

5. Introduction to Meetings

- The Help List
- Agenda for First Joint Meeting
- Agenda for Subsequent Joint Meetings
- Attorney's Report to Team on First Joint Meeting
- Team Member's Report on Joint Meeting
- Client's Evaluation of Joint Meeting
- Client's Evaluation of Four-Way Meeting with Attorneys
- Meeting Minutes - Letter Format and Report or E-Mail Format
- Debriefing Checklists:
 - Client Debriefing Checklist
 - Collaborative Team Debriefing Checklist

6. Introduction to Negotiations

- Suggestions for Being an Effective Collaborative Team Member, Part 2
- Collaborative Attorney Preparation Before Negotiations
- Designing a Process for Creating Packages
- Impasse Management
- Difficult Conversations Model
- Being an Ally

7. Introduction to Completing the Case

- Collaborative Professionals Final Debriefing Checklist
- Data Collection Form
- Client File Closing Letter
- Client Survey