

Collaborative Practice Skills Training

(Presented with a Family Professional and a Financial Professional)

Agenda – Day 1

9:00 – 12:00

Introduction / Challenges /Goals

**Review of Stages of Collaborative Process and Professional Team
The Wisdom of Teams
The Reflective Practitioner**

Dimensions of Conflict

**Screening and Assessment
Demo – *Initial consultation***

12:00 – 1:00

Lunch

1:00 – 4:15

Communication Skills

**Difficult Conversations
Active Listening
Non-defensive questioning
“I” statements**

**Writing Progress Notes Dos and Don'ts
Writing Agreements**

Day 2

9:00 – 12:00

How We Engage In and Avoid Conflict

Integrative and Distributive Negotiation

Spectrum of Needs and Interests
Core concerns

Uncovering Interests

*Role play -Client preparation meeting
debrief*

12:00 – 1:00

Lunch

1:00 – 4:15

Understanding Power

Professional Breakout Sessions

Lawyers-focus on the law

Family Professionals-focus on facilitation

Financial Professionals- focus on presenting financial info/ tools

The Importance of Preparation and Debrief

Day 3

9:00 – 12:00

Pre-meeting Professional Preparation -demo

Third collaborative meeting-demo

Presentation of the law and financial information

Option generation and dimensions of resolution

12:00 –1:00

Lunch

1:00 – 4:15

Option generation-table exercise

Debrief option generation

Advocacy Issues

Team Issues

Managing Challenging Clients and Impasse

Wrap up and final questions

Closing circle