

Collaborative Family Law
First Four-way Meeting
Process Agenda Checklist

- Creating physical environment of Collaboration
 - Seating arrangements; setting up minutes taking method, laptops, projectors, etc.
- Introductions: greeting, acknowledgment and appreciation of client participation in process.
- Describe the characteristics of the process:
 - Meeting minutes
 - Team e-mails (no substantive correspondence via email)
 - Participate and speak for themselves, supported by attorneys
 - Taking breaks, clients speaking privately with their own attorney
 - Safety, trust, transparency
 - Recognize the process may be bumpy - normalize difficulties
 - Problem-solving
 - Pace of the process
 - Committing to the process: What makes the process work
(*Good Faith Commitment* handout)
- Review, explain and sign the *Collaborative Participation Agreement*
 - Discuss Schedule A - *Steps for Effective Problem Solving*
- Write in the minutes:
 - Why I chose the collaborative process
 - Goals of the collaborative process for the clients
- Address pressing issues
 - Temporary financial arrangements
 - Temporary parenting issues/plans
 - Memorialize any agreements
- Attorney fees
- Identify expected issues & areas of agreement
- Identify tasks necessary to move forward in process
 - Create to-do lists with due dates
 - Fact gathering plan
 - Document notebooks, asset/liability lists
 - Use of other professionals: CDFA, facilitators/coaches, kids and parenting coach, pension attorneys, valuations/appraisers, etc. as appropriate
- Set preliminary agenda for next meeting including:
 - Share results of homework assignment
 - Other issues
 - Calendar team meeting date(s)
- 10-15 minutes before end of session - review meeting minutes
- Circulate meeting minutes (hard copy) at end of session followed by email versions
- Attorneys debrief with own client
- Attorney-attorney debrief