GLOBAL COLLABORATIVE LAW COUNCIL

presents the

13th Annual Civil Collaborative Law Conference
One Day Basic Training | Two Day Advanced Collaborative Training

WHEN: September 7-9, 2017 | 8:30 a.m. to 5:30 p.m.
WHERE: Hillsborough County Bar Association
1610 North Tampa Street | Tampa, Florida 33602

For further information:
www.collaborativelaw.us > Upcoming Events

Melanie Atha
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Joryn Jenkins
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13th Annual Civil Collaborative Law Conference

FACULTY

Sherrie R. Abney
Carrollton, Texas

Melanie Atha
Birmingham, Alabama

Kristen M. Blankley
Lincoln, Nebraska

R. Paul Faxon
Waltham, Massachusetts

Jeffrey Fink
Wellesley, Massachusetts

Aida Havel
Raleigh, North Carolina

David Hoffman
Boston, Massachusetts

Joryn Jenkins
Tampa, Florida

Barbara Kelly, PhD
Maitland, Florida

Lawrence R. Maxwell, Jr.
Dallas, Texas

Glenn F. Meier
Las Vegas, Nevada

Douglas Rosner
Los Angeles, California

Marc O. Sheridan
Mount Kisco, New York

Anne Shuttee
Dallas, Texas

Stu Webb
Edina, Minnesota

J. Kim Wright
Location independent

Michael Zeytoonian
Wellesley Hills, Massachusetts
AGENDA
GCLC 13th ANNUAL TRAINING - SEPTEMBER 7 – 9, 2017
DAY ONE – INTRODUCTORY TRAINING

8:00-8:30 – Registration
8:30-8:45 – Welcome and Sponsor Recognition

I. 8:45 – 9:45 – Introduction to Integrative Law, including Collaborative Practice
    Kim Wright
    In this overview of integrative law and the collaborative process, we will consider:
    • Listening: paradigm shifts, suspending judgment, and trying new ideas;
    • Systems Change: trophic cascades, reinventing organizations, spiral dynamics, integral movement, consciousness, etc.; and
    • Cornerstones of the Changes in Law: a brief look and exploration of ethical and professional implications:
      o reflective and contemplative
      o values-based
      o systems
      o integral consciousness/mindset

II. 9:45 – 10:30 – Ethical Basis for Collaboration
    Kristen Blankley
    Kristen discusses the ethical issues implicated in the practice of collaborative law. Consider the ethics of collaborative law as limited scope representation, and whether the process must be “reasonable under the circumstances.” What is informed consent and how should informed consent be documented? In what situations is CL beneficial and when should it not be used? Is the suitability of attorneys for the process something one must consider? How do “zealousness” and CL work in tandem? Can one side ever disqualify the other lawyer?

III. 10:30-10:45 – Break

IV. 10:45-11:30 – Collaborative Process Anchors (Including Participation Agreement/Protocols)
    Anne Shuttee
    Anne reviews the twin contractual foundations of the collaborative dispute resolution process: the Participation Agreement and the Protocols of Practice. She will discuss the essential elements of the Participation Agreement, including defining the matter that is the subject to the process, identification of the collaborative lawyers involved, disqualification provisions applicable to the collaborative lawyers and their firms, the parties’ duties of disclosure, confidentiality, and termination of the process, among others. She will also explore the nature and purpose of the Protocols of Practice governing the conduct of the collaborative lawyers, including the duties owed by the lawyers to their clients and to opposing counsel, the role played by the collaborative
lawyers in the process, the role of experts, duties of disclosure, and withdrawal of or termination of the process by a collaborative lawyer.

V. 11:30-12:30 – Lunch

VI. 12:30-1:00 – Getting Clients on Board (Including Candidates and Screening)
   Doug Rosner
   Who is your client and what is his issue? What was his relationship with the other party before their dispute? What are his expectations for resolution? What are his interests and concerns? How do you get answers to these questions and more in your screening process? How do you explain the various dispute resolution processes to your client? How do you explain the collaborative process to him? Why would the collaborative option appeal to this client? What are your goals in the consultation? Join Doug as he answers these questions and explores the screening interview and how to get clients on board with the collaborative choice.

VII. 1:00-1:45 – Roadmap of Collaborative Process
    Sherrie Abney
    A basic explanation of the various stages that the parties and lawyers travel through in the collaborative process and the reasons why these steps are necessary. Unlike other forms of dispute resolution, the parties in Collaborative Law are kept informed regarding what they are doing and why they are doing it. The road map gives the lawyers the foundation to lead their clients to a successful resolution.

VIII. 1:45-2:30 – Making the Paradigm Shift
      Aida Havel
      Aida explores how to make the transition from the rules and position-based negotiating taught in law school to a more cooperative, interest-based approach to solving legal issues. We will consider the different skill sets and personal characteristics of collaborative attorneys and trial lawyers. Aida proposes that we can use ten specific ideas to make the shift and offers us the reward of increased job satisfaction and personal growth if we do.

IX. 2:30-2:45 – Break

X. 2:45-3:30 – Client Preparation (Including Debrief)
   Melanie Atha
   Once your clients are on board and the team assembled, what does the collaborative lawyer need to do to have the client ready for the first collaborative meeting? What needs to be done in follow up to keep the client prepared for subsequent meetings as the case progresses towards resolution? What opportunities for process improvement can the collaborative lawyer and her client anticipate and take advantage of? This session focuses on the importance of client prep and debriefing in collaborative process.

XI. 3:30-4:30 – Collaborative Meetings, Step-By-Step
Sherrie Abney
A detailed explanation of how collaborative meetings are conducted including various means of assisting participants in forming a team to solve their problem rather than behaving toward each other as adversaries. Lawyers will review forms for agendas and minutes of meetings as well as managing meetings, seating arrangements and other details that allow the meetings to run smoothly and the parties to be more relaxed and comfortable.

XII. 4:30-5:00 – Q & A and wrap up

**DAY ONE – 405 MINUTES (INCLUDING 60 MINUTES ETHICS) CLE CREDIT APPLIED FOR**

**DAY TWO – ADVANCED COLLABORATIVE CIVIL TRAINING**

8:30-8:45 – Welcome and Sponsor Recognition

I. 8:45-9:45 – Use of Mediators in Collaboration
   David Hoffman/Larry Maxwell
   David and Larry discuss a brief history of the relationship between mediation and collaboration. Are there too many cooks in the kitchen? Consider how collaborative law has evolved from four people to six, eight, and now five. What of the strained relations between mediation and collaborative practice? If we use a mediator in CL, how do we decide what type of mediator to use? Is she a lawyer, therapist, financial specialist, or some other kind? Is he facilitative, evaluative/directive, transformative, or a combination of all three? Can and, if so, how do mediators add value to the process? And, lastly, how do privilege, confidentiality, and ethics interplay when a mediator is introduced into the process? Among other issues, whose rules govern ethics, and why does it matter?

II. 9:45-10:00 – Break

III. 10:00- 11:30 – Conscious Contracts
    Kim Wright
    In this day of buying forms on-line, lawyer-provided contracts must offer a more customized approach. What is it that we can offer our clients that is more than forms that can be downloaded? Kim introduces a new model of drafting contracts that incorporates the principles of conscious business, deliberate selection of conflict resolution approaches, and how to talk to your clients about your role as a lawyer in helping them to build sustainable relationships. For civil collaborative practitioners looking to expand their client base or family practitioners who want to create more conscious lawyer-client relationships, this one-hour program is an overview to the longer program Kim offers around the world.

IV. 11:30-1:00 – Lunch – Panel Discussion: Do What Works
    Sherrie Abney, Stu Webb, Barbara Kelly, and Joryn Jenkins
Soft skills are critical to the sales process and in executive polish, which is all about solving the client's problems profitably. But how do we, collaborative professionals, apply our soft skills? How do we ensure mutually satisfactory conflict management or, if necessary, negotiate an equally acceptable exit strategy for the relationship, whether it's an employment relationship, a commercial partnership, a divorce, a family business, a real estate enterprise or some other business relationship? Join us as we talk about that with the progenitors of both the collaborative divorce and collaborative civil dispute processes, along with an experienced collaborative facilitator.

V. 1:00-2:30 – Case Study
Sherrie Abney/Marc Sheridan
Attendees will be divided into groups and general descriptions of the dispute and the parties in the dispute will be distributed. Participants in each group will role play a "character" in a Collaborative Law case from beginning to end employing all of the steps in the collaborative process. Roles will include the parties, their lawyers, any experts they determine they need, and a facilitator to keep discussions on track. The case concerns business partners who were very close at one time. However, their relationship began to go awry, and they literally ceased communicating with each other. Not wanting to go to court, they choose Collaborative Law in an attempt to resolve their dispute. The goal of this exercise will be to turn what would normally be an adversarial situation into a team effort to find the best solutions for each party, mend their relationships and put the business back on track.

VI. 2:30-2:45 – Break

VII. 2:45-4:00 – Successful Resolution of Small Business Disputes
Michael Zeytoonian/Paul Faxon
Join us as we explore the collaborative approach to resolving a commercial dispute. This workshop offers a case study of a 2016 business dispute in which Collaborative Law (CL) accomplished that which the parties could not achieve on their own, offering them a solution that no court could have provided. Here, the two principles of a closely-held business could not agree on 1) the future direction of the business or 2) whether they should sell it or one should buy out the other. In this case, the owners were formerly married, had undergone a CL divorce and mediation, and continued to work together post-divorce for several years. However, eventually they reached a point at which their level of disagreement was choking the success of the business. We focus on the interests and goals of the parties, the options for transactions for the business, and the creative solution which provided the owners a framework within which their interests could be met and their differing opinions of the value of the business productively tested. See how the owners' individual and shared interests were relied on, revisited, and served as a compass for working toward options for resolution. Understand how the CL process used a neutral business valuation expert and how that expert information served both the owners' needs and the process itself. Appreciate how the CL process allowed the owners, expert, and lawyers collaborated,
developing a unique structure for resolution and providing both owners with the vehicle for executing two separate transactions designed to satisfy their individual needs. Lastly, the presenters will challenge the audience to enlarge their definition of what constitutes a “successful” Collaborative Law case outcome.

VIII. 4:00-5:15 – Case study (continued)
Sherrie Abney/Marc Sheridan

IX. 5:15 -5:30 – Q & A

5:30 Social Hour at Ulele

DAY TWO – 495 MINUTES CLE CREDIT APPLIED FOR
DAY THREE – ADVANCED COLLABORATIVE CIVIL TRAINING

8:30-8:45 – Welcome and sponsor recognition

I. 8:45-10:15 – Power of TED - The Empowerment Dynamic
Glenn Meier
When people are embroiled in conflict, it is easy for them to become stuck in ways of thinking that drag the conflict out. Collaborative practices offer a different way of relating to conflict, but unless people bring a different mindset to those processes, collaborative practice won’t reach its full potential. The Power of TED* (The Empowerment Dynamic) offers tools for both individuals and organization to relate differently to what the world throws at them. TED* teaches people how to transform everyday drama and opt for more growth oriented solutions.

II. 10:15-10:30 – Break

III. 10:30-11:45 – Case Study (continued)
Sherrie Abney/Marc Sheridan

IV. 11:45-12:45 – Lunch

V. 12:45-1:45 – Beyond Informed Consent: Real-World Ethics for Civil Collaborative Lawyers
Jeffrey Fink
Jeffrey suggests why our ethics require more than just informed consent to a limited scope representation. In this developing area, our speaker provides us with sources of ethical and professional responsibility guidance for our deeper consideration of 1) marketing and client intake; 2) contested proceedings and the scope of voluntarily assumed limitations; 3) internal law firm operations; 4) how to be professionally responsible with other participants: teamwork, communications, disclosure, confidentiality and privilege, third party participants, and collaborative advocacy; and 5) consequences: bar discipline and liability or just peer pressure?
VI.  1:45-3:00 – Case Study (continued)
      Sherrie Abney/Marc Sheridan

VII.  3:00-3:15 – Break

VIII. 3:15-4:30 – Marketing Your Collaborative Practice
       Joryn Jenkins
       Collaborative professionals may be challenged in communicating the utility of the team approach to their clients. Also, clients’ anxiety about perceived costs may prevent them from envisioning the benefits of the team approach. Joryn offers a variety of marketing strategies and tools that will enable the collaborative practitioner to effectively promote the benefits of the collaborative team model. For civil collaborative practitioners looking to expand their client base, this one-hour program is an overview to day-long training Joryn offers world-wide. Learn the art and science of marketing the collaborative process effectively.

IX.  4:30-5:00 – Q & A and wrap up

DAY THREE – 405 MINUTES (INCLUDING 60 MINUTES ETHICS) CLE CREDIT APPLIED FOR
REGISTRATION FORM
13th Annual Civil Collaborative Law Conference

Name ____________________________________________ First Name for Badge __________________
Address _________________________________________
Phone __________________________________________ Fax __________________________ Email _____________
Please check one: Attorney Judge Student MHP Financial Other

Early Registration for All Three Days of Conference (prior to August 17th) ........................................... $790.00
 Regular Registration for All Three Days of Conference (on or after August 17th) ................................. $875.00
 Less Discount for Being a Licensed Professional Member of one of the financial sponsors ...................... $(75.00)

Early Registration for Days Two and Three of Conference (prior to August 17th) ..................................... $580.00
 Regular Registration for Days Two and Three of Conference (on or after August 17th) ....................... $625.00
 Less Discount for Being a Licensed Professional Member of one of the financial sponsors ................ $(50.00)

Early Registration for Day One of Conference (prior to August 17th) ...................................................... $310.00
 Regular Registration for Day One of Conference (on or after August 17th) .......................................... $360.00
 Less Discount for Being a Licensed Professional Member of one of the financial sponsors ................. $(25.00)

SPECIAL RATES (NOT ELIGIBLE FOR ADDITIONAL DISCOUNTS)
Judge, Law Faculty or Student, Professional Licensed 2013 or later for All Three Days ................................. $400.00
Judge, Law Faculty or Student, Professional Licensed 2013 or later for Days Two and Three only ............ $275.00
Judge, Law Faculty or Student, Professional Licensed 2013 or later for Day One only .............................. $125.00

Materials available online at no charge to attendees.
$25.00 per day additional charge for hard copies of materials
Hard copies must be ordered by August 30, 2017. Indicate day(s) Day 1______Day 2______Day 3______ $ ______

TOTAL AMOUNT ENCLOSED: $ ______

Lunch and Parking are included each day for Conference Participants

To Register: Mail Check payable to “Global Collaborative Law Council”
2840 Keller Springs Road, Suite 204, Carrollton, Texas 75006

OR

To pay by Credit Card, please fax to: 214-739-8959
Questions? Contact Melanie Atha (205) 716-5212 or Joryn Jenkins (813) 870-3839

Amount $ __________ VISA □ MASTERCARD □ AMEX □ DISCOVER □
Account # ______________ Expiration Date __________ 3-Digit Code ______

Signature ____________________________

Cancellation Policy: $40.00 of the registration fee is non-refundable. A full refund of the registration fee, less $40.00, will be
given if cancellation is made up to 14 days before the event. Cancellations made within 14 days of the event will receive a full
refund of their registration fee, less $100.
GLOBAL COLLABORATIVE LAW COUNCIL
INVITATION FOR SPONSORSHIP

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**Title Sponsor** [one - $5000] Title Sponsor will be able to hand out materials to participants at their own table. They will be given 5 minutes at the beginning of the training to tell the participants about their company. We will have signage at the event showing this sponsor displayed on its own board. Additionally, we will have a list of all sponsors on the advertising materials for the training.

**Cocktail Reception Sponsor** [one - $5000] Cocktail Sponsor will be given 5 minutes at the beginning of the cocktail reception to tell the participants about their company. We will have signage at the cocktail reception showing this sponsor displayed on its own board. Additionally, we will have a list of all sponsors on the advertising materials for the training.

**Special Guests Sponsor** [one - $2500] - Special Guest Sponsor will be announced as the speaker is introduced and will be listed on the advertising materials for the training.

**Material Sponsor** [$800] Material Sponsor’s company name will be displayed on the materials (binders, flash drives). We will have signage at the training showing this sponsor. Additionally, we will have a list of all sponsors on the advertising materials for the training.

**Speaker Sponsor** [$250] Speaker sponsors will be announced as the speaker is introduced and will be listed on the advertising materials for the training.

**Training Table Sponsor** [$100 per table] Table sponsor’s company name will be displayed on the training table and will be listed on the advertising materials for the training.

**Food Sponsor Options:**

- **Lunch** [three - $750] We will have signage at the training showing these sponsors. Additionally, we will have a list of the sponsors on the advertising materials for the training.

- **Breakfast** [three - $500] We will have signage at the training showing these sponsors. Additionally, we will have a list of the sponsors on the advertising materials for the training.

- **Snack** [three $250] We will have signage at the training showing these sponsors. Additionally, we will have a list of the sponsors on the advertising materials for the training.

Sponsorships filled on a first come, first served basis.
To reserve your sponsorship, please contact:

MELANIE ATHA
mma@cabaniss.com | (205) 716-5212

Make checks payable to: Global Collaborative Law Council. Return form with payment to Global Collaborative Law Council, 2840 Keller Springs Road, Suite 204, Carrollton, Texas 75006.

GCLC is a 501(c)(3), non-profit organization.