CHECKLIST FOR FIRST TEAM PROFESSIONALS MEETING

- ☐ Assign note taker
- ☐ Obtain contact information, preferred email address, and telephone numbers for each Team member
- ☐ Discuss whether any relationships among team members need to be disclosed to and discussed with clients.
- ☐ Discuss how each professional views his/her role
- ☐ Discuss how each professional views working as a Team
- ☐ Discuss team members' views of who drives process decisions: team or parties?
- ☐ Specific to coaches' role:
    - ➢ How do Team members view coaches' role in meetings
    - ➢ How do Team members view coaches role vis-à-vis other team members
    - ➢ How does each coach view her/his role with the party, in the process
- ☐ Discuss Meetings:
    - ➢ Location
    - ➢ Length
    - ➢ Scheduling--consider scheduling full team/party meetings in advance
    - ➢ Who should attend
    - ➢ Breaks during meeting
    - ➢ Check-ins before meeting: team members with parties and among team
    - ➢ Debriefing after meeting: coaches and attorneys debrief with each party and team members debrief together
- ☐ Discuss and agree on plan for on-going team communications
    - ➢ Weekly or bi-weekly conference calls and what mechanism will be used for the conference calls, who will facilitate the calls
    - ➢ Emails--frequency, subject line (name case and be specific), billing, say TEAM ONLY if it is only for the team
    - ➢ Team meetings (team only)
    - ➢ Communications with team after professionals' meetings with parties
    - ➢ Billing team time for team communications
    - ➢ What will be communicated to the parties about team communications?
- ☐ Discuss what each team member's first conversation with party looks like
- ☐ Discuss in what order parties shall meet with professionals
- ☐ Discuss what professionals' attendance at Collaborative meetings would assist parties
- ☐ Discuss confidentiality and ability to communicate with Team (including privilege of attorney/party and lack of privilege for coach/party)
- ☐ Discuss how legal information and possible outcomes will be presented to parties
- ☐ Discuss understanding of what information must be disclosed, *i.e.,* interpretation of "information related to the collaborative matter"
- ☐ Discuss how deeply team wants to explore what each party wants and why
- ☐ Discuss whether there are any issues that need to be addressed immediately, *e.g.,* cash flow, parenting schedule
- ☐ Set dates for potential Team meetings with parties
- ☐ Discuss seating arrangements for Team meetings with parties
- ☐ Discuss who will facilitate Team meetings with parties

- ☐ Discuss who will write on flip chart for Team meetings with parties
- ☐ Discuss whether any Team members or parties will caucus separately during Team meetings with parties and whether Team members will break to meet
- ☐ Share information about what is difficult for parties and how to assist them
- ☐ Share engagement agreements and Collaborative contracts
- ☐ Discuss rates, each professional's expectation re prompt payment of accounts receivable, any billing rate variances that might create difficulties in Collaborative Process.
- ☐ Discuss what each person charges for: how much to charge for team meetings and phone calls, whether to charge for travel, emails, etc.
- ☐ Discuss how each person likes to receive feedback.