

**CPEB PROPOSED  
STREAMLINED COLLABORATIVE DIVORCE  
SUBMITTED BY MODEST MEANS COMMITTEE  
March 26, 2015**

**One Protocol (Two Attorneys, One or Two Coach Model, With or Without Child Specialist)**

**Two Fee Tracks.** This protocol can be used with either the professionals' regular hourly fees, or with reduced hourly fees. A sample fee schedule with reduced hourly fees is attached.

1. **Preliminary Steps** (Not included in package fee. This time is billed as the professionals would bill their regular consultations/intakes). These steps are outlined in the preferred order, however it is understood that in some cases the order may vary.
  - A. Client initial contact regarding the collaborative process; professional explains the Streamlined Model.
  - B. Client assessment for suitability for collaborative process is begun by initial professional contacted, continues throughout this process.
  - C. Attorney(s) do the financial assessment to see if potential Reduced Fee case.
    - 1) There will be an assessment tool for use in this process.
  - D. The first professional involved will explore the availability of other possible team members from our panel and provide names and recommendations to the client.
    - 2) Professionals will use the Assessment Guideline tools.
  - E. Clients retain attorneys, who then send clients the Principles and Guidelines for Collaborative Practice and the Stipulation and Order re: Collaborative Law.
  - F. Clients sign releases and confidentiality waivers – as appropriate.
  - G. Team conference call or meeting of 30-60 minutes, regarding process to prepare for the first meeting. Professionals should be encouraged to share crucial information about clients but limit it to the minimum, e.g. communication style. It is imperative that professionals do not go into substantive discussions but focus on process. (at no charge to clients.)
  - H. Clients are trained in the streamlined model.

## **2. First Full Team Meeting (Billing begins)**

**Preparation.** The success of this and all subsequent meetings will depend on all of the professionals coming fully prepared and with documents in hand. Make sure the professionals and clients come with calendars, have read all documents and bring them with them, make sure they are aware of issues such as traffic and leave enough time to get settled.

**2a. Thirty Minute Pre-meeting conference.** Each client will have a separate 3-way meeting with attorney and coach, immediately prior to first full team meeting. Attorney (.5 hours) and Coach (1 total hour in either model)

Objectives:

- (1) 30 minute meeting
  - a. Client and attorney to join and bond, and client to identify and feel supported.
  - b. Review the collaborative protocol.
  - c. Give roadmap for the full meeting
  - d. Understand the full team meeting is all about the process and that we will not be covering substantive issues at this [Note to practitioner] Do not let the process get hijacked with “emergency issues” that will take the process out of the protocol.

**2b. One Hour Full Team Meeting (Clients, Attorneys, Coach(es), Financial)** A practical, confirmation of “buy-in” meeting during which the collaborative documents are signed, financial disclosure forms are given to the clients, the roadmap is defined and subsequent meetings are calendared.

- Consider timeline for filing Petition, initiating court proceeding

## **3. Interim Work**

**3a Disclosures, Document Exchange (Financial: 1.5 hours meeting with each client; 2 hours document preparation; Attorneys .5 hours each)**

- Clients each fill out forms, gather information, and organize documents.
- Each client meets with financial to review and finalize disclosure documents.
- Financial provides disclosure documents to attorneys and clients.

**3b. Coach/Client 3- or 4-Way (2 hours)**

- Explore communication issues.
- Explore parenting issues
- Decide if Child Specialist needed.

## **4. Child Specialist Meets with Parents and Children (~6 hours).**

5. **Separate 3-Way Meetings with each Client, Attorney (2 hours) and Coach (4 hours – two with each party if one-coach model; 2 hours per coach if two-coach model)**
  - Identify issues.
  - Determine whether additional information is needed.
  - Identify goals and interests.
  
6. **Second Full Team Meeting (Clients, Coach(es), Attorneys, Financials, and Child Specialist if needed) (2 hours)**
  - Identify goals and interests; prioritize goals.
  - Identify issues.
  - Review Disclosures and agree on additional information to be provided.
  - Review agenda and confirm / modify date for third Team Meeting.
  - Review progress of case
  
7. **Coach(es)/Clients/Child Specialist Feedback - as needed Meeting (2 hours)**
  - Discuss parenting plan options.
  
8. **Coach/Clients 3- or 4-Way (2 hours) (w/out Child Specialist)**
  - Complete and finalize parenting plan
  - Determine if there are any other issues in the way of reaching agreement.
  
9. **Professional Team Conference Call (1 hour)**
  - Mid-process de-brief, check-in
  
10. **Separate 3-Way Meetings with each Client Attorney (2 hours) and Coach 4 hours – 2 with each party if One Coach Model; 2 hours per coach if Two Coach Model). (Add financial?)**
  - Brainstorm settlement options in preparation for third team meeting.
  
11. **Third Full Team Meeting (Clients, Coaches, Attorneys and Financial) (2 hours)**
  - Brainstorm settlement options.
  - Negotiate to resolution - if possible.
  
12. **Fourth Full Team Meeting (Clients/Coaches/Attorneys/Financial) (2 hours) – Optional as Needed**
  - Continue negotiation and finalize agreements or
  - If settlement not reached, discuss roadmap of next steps.
  
13. **Draft Pleadings and Settlement Agreement or Roadmap (5 hours per attorney)**
  - Draft and review Marital Settlement Agreement and final documents, or
  - Draft roadmap.
  
14. **Final Team Meeting (Clients/Coach/Attorneys) (1 hour)**
  - Sign Judgment or Roadmap.

Streamlined Model; Reduced Fee Matrix (All Scenarios in One Chart)

	A1	A2	Coach		FN	CS	Total	
			1 model	2 model			1 coach model	2 coach model
1 Preliminary Steps								
2a Separate 3-Way Meetings	.5	.5	1	1	--	--		
2b Full Team Meeting	1	1	1	2	1			
3a Disclosures	.5	.5	--	--	5			
3b Coach / Clients 3- or 4-way	--	--	2	4	--			
4 Child Specialist Meets with Parents and Child(ren)	--	--	--	--	--	6		
5 Separate 3-Way Meetings	2	2	4	4	--	--		
6 Full Team Meeting	2	2	2	4	2	2*		
7 Child Specialist Feedback	--	--	2	4	--	2		
8 Coach /Clients 3- or 4-way	--	--	2	4	--	--		
9 Professional Team Conf Call	1	1	1	2	1	1*		
10 Separate 3-way Meetings	2	2	4	4	4**	--		
11 Full Team Meeting	2	2	2	4	2	--		
12 Full Team Meeting	2	2	2	4	2	--		
13 Draft Pleadings / Settlement	5	5	--	--	--	--		
14 Final Team Meeting	1	1	1	2	--	--		
Total Hours	19	19	22	35	13-17	8 - 11		
Reduced Hourly Fee	\$125	\$125	\$70	\$70	\$70	\$70		
TOTAL without child specialist	\$2375	\$2375	\$1540	\$2450	\$910 - 1190	--	\$7200- 7480	\$8110 - 8390
TOTAL ADD with child specialist			\$140	\$280		\$560- 770	\$7900 - 8390	\$8950 - 9440
Additional 2 hour full team meetings? ADD	\$250	\$250	\$140	\$280	\$140		\$780	\$920

\* even if child specialist included, still optional as to whether they will be involved in any full team meetings or professional debrief  
 \*\* may or may not include financial in Step 10 separate 3-ways

**Streamlined Model; Reduced Fee Matrix  
(With Child Specialist)**

	A1	A2	Coach		FN	CS	Total	
			1 model	2 model			1 coach model	2 coach model
1 Preliminary Steps	Not included in fee structure – billed separately according to each professional's consultation / intake practice.							
2a Separate 3-Way Meetings	.5	.5	1	1	--	--		
2b Full Team Meeting	1	1	1	2	1			
3a Disclosures	.5	.5	--	--	5	--		
3b Coach / Clients 3- or 4-way	--	--	2	4	--	--		
4 Child Specialist Meets with Parents and Child(ren)	--	--	--	--	--	6		
5 Separate 3-Way Meetings	2	2	4	4	--	--		
6 Full Team Meeting	2	2	2	4	2	2*		
7 Child Specialist Feedback	--	--	2	4	--	2		
8 Coach /Clients 3- or 4-way	--	--	2	4	--	--		
9 Professional Team Conf Call	1	1	1	2	1	1*		
10 Separate 3-way Meetings	2	2	4	4	4**	--		
11 Full Team Meeting	2	2	2	4	2	--		
12 Full Team Meeting	2	2	2	4	2	--		
13 Draft Pleadings / Settlement	5	5	--	--	--	--		
14 Final Team Meeting	1	1	1	2	--	--		
<b>Total Hours</b>	<b>19</b>	<b>19</b>	<b>24</b>	<b>39</b>	<b>13-17</b>	<b>8 - 11</b>		
<b>Reduced Hourly Fee</b>	<b>\$125</b>	<b>\$125</b>	<b>\$70</b>	<b>\$70</b>	<b>\$70</b>	<b>\$70</b>		
<b>TOTAL</b>	<b>\$2375</b>	<b>\$2375</b>	<b>\$1680</b>	<b>\$2730</b>	<b>\$910 – 1190</b>	<b>\$560-770</b>	<b>\$7900 - 8390</b>	<b>\$8950 - 9440</b>
Additional 2 hour full team meetings? ADD	\$250	250	140	280	140		\$780	\$920
* even if child specialist included, still optional as to whether they will be involved in any full team meetings or professional debrief								
** may or may not include financial in Step 10 separate 3-ways								

**Streamlined Model; Reduced Fee Matrix  
(No Child Specialist)**

	A1	A2	Coach		FN	Total	
			1 model	2 model		1 coach model	2 coach model
1 Preliminary Steps	Not included in fee structure – billed separately according to each professional's consultation / intake practice.						
2a Separate 3-Way Meetings	.5	.5	1	1	--		
2b Full Team Meeting	1	1	1	2	1		
3a Disclosures	.5	.5	--	--	5		
3b Coach / Clients 3- or 4-way	--	--	2	4	--		
4. NOT APPLICABLE	--	--	--	--	--		
5 Separate 3-Way Meetings	2	2	4	4	--		
6 Full Team Meeting	2	2	2	4	2		
7. NOT APPLICABLE	--	--	--	--	--		
8 Coach /Clients 3- or 4-way	--	--	2	4	--		
9 Professional Team Conf Call	1	1	1	2	1		
10 Separate 3-way Meetings	2	2	4	4	4**		
11 Full Team Meeting	2	2	2	4	2		
12 Full Team Meeting	2	2	2	4	2		
13 Draft Pleadings / Settlement	5	5	--	--	--		
14 Final Team Meeting	1	1	1	2	--		
<b>Total Hours</b>	<b>19</b>	<b>19</b>	<b>22</b>	<b>35</b>	<b>13-17</b>		
<b>Reduced Hourly Fee</b>	<b>\$125</b>	<b>\$125</b>	<b>\$70</b>	<b>\$70</b>	<b>\$70</b>		
<b>TOTAL</b>	<b>\$2375</b>	<b>\$2375</b>	<b>\$1540</b>	<b>\$2450</b>	<b>\$910 -1190</b>	<b>\$7200 - 7480</b>	<b>\$8110 - 8390</b>
<b>Additional 2 hour full team meetings? ADD</b>	<b>\$250</b>	<b>\$250</b>	<b>\$140</b>	<b>\$280</b>	<b>\$140</b>	<b>\$780</b>	<b>\$920</b>
<b>** may or may not include financial in Step 10 separate 3-ways</b>							