

**OACP Annual Conference and
Interdisciplinary Collaborative Practice Training
Sponsored by Oklahoma Academy of Collaborative Professionals
and the Family Law Section of the OBA**

WHERE: Stillwater, OK
OSU's campus.

When/What: Thursday, April 30th Interdisciplinary Training – Day 1
Friday, May 1st- Interdisciplinary Training – Day 2
Saturday, May 2nd Annual Meeting for all OACP members, and Training Participants

Where to stay: The Atherton Hotel
Located on OSU's campus
103 Student Union
Stillwater, OK 74078

INTERDISCIPLINARY TRAINING

April 30th and May 1st

CLE Credit: This 2 day course has been approved by the Oklahoma Bar Association Mandatory Continuing Legal Education Commission for 14 hours of mandatory CLE credit, including 1 hour of ethics. Continuing education credit for other professions is pending.

Tuition: \$350 for early-bird registrations with payment received at least four full business days prior to the seminar date; \$375 for registrations with payment received within four full business days of the seminar date.

Cancellation Policy: Cancellations will be accepted at any time prior to the seminar date; however, a \$25 fee will be charged for cancellations made within four full business days of the seminar date. Cancellations, refunds, or transfers will not be accepted on or after the seminar date.

Synopsis: This two-day course will teach attendees the fundamentals of interdisciplinary collaborative practice. Collaborative practice is a process of resolving legal conflicts through principled negotiations. Parties employ collaborative professionals who support them in reaching a settlement outside the adversarial process of court-imposed resolution. Interdisciplinary collaborative practice gives clients the benefit of expertise, assistance and support from the most qualified professional using a team approach.

Who should attend?

- Attorneys interested in learning or enhancing collaborative practice skills.
- Therapists from the following disciplines: psychologists, marriage and family therapists, clinical counselors, social workers in clinical practice.
- Financial specialists from the following fields: Certified Public Accountant, Certified Financial Planner, and Certified Divorce Planner.

Course Content: This two-day course will cover the interdisciplinary model of collaborative practice, and will include:

- Process options for clients: informed decision-making.
- The role of each collaborative professional (lawyer, divorce coach, child specialist and financial specialist).
- The process of working with an interdisciplinary collaborative case, from beginning to completion.
- The strengths and challenges of team work with other professionals.

Faculty:

- **David A. Tracy, J.D., Naylor, Williams & Tracy, Inc., Tulsa, OK**

- Jacquelyn W. Cleary, M.S., L.P.C., Tulsa, OK
- Donna Smalldon, CDFA, CFP, MBA, CFDP, Portland, Oregon

Thursday April 30th: Interdisciplinary Training will be held in the Jones Seminar Room located at OSU Alumni Center

- 8:30 Registration
- 9:00 Burning Questions - The Dispute Resolution Continuum and Conflict Mode Instrument
- 9:50 Break
- 10:00 The Key Elements of the Collaborative Process and a Brief History of Collaborative Practice
- 10:50 Overview of Interdisciplinary Collaborative Practice - What Do Coaches, Child Specialists, and Financial Specialists Do?
- 11:40 Break
- 11:50 Assumptions & Characteristics of Competitive v. Collaborative Negotiation
- 12:40 Networking lunch (included in registration)
- 1:30 Fundamentals of the Collaborative Process
- 2:20 Initial Client Interviews Incorporating the Collaborative Practice Option
- 3:10 Break
- 3:20 Role Play of Initial Lawyer-Client Interview
- 4:10 Adjourn

Friday May 1st: Interdisciplinary Training will be held in the Jones Seminar Room located at OSU Alumni Center

- 8:30 Registration and Continental Breakfast
- 9:00 Preparing the Client for the First 4-way Session
- 9:50 Break
- 10:00 Preparing with Your Collaborative Counterpart for the First 4-way Session
- 10:25 Role Play of First 4-way Session with Lawyers
- 11:15 Role Play of First 4-way Session with Coaches
- 11:40 Break
- 11:50 Breakout Sessions - Allied Professional Roles in the Collaborative Team
- 12:40 Networking lunch (included in registration)
- 1:30 Dealing with Challenges in Collaborative Negotiation
- 2:20 Ethical Issues in Collaborative Practice (ethics)
- 3:10 Break
- 3:20 Building Your Collaborative Practice and Your Interdisciplinary collaborative Practice Group
- 4:10 Adjourn

OACP 2009 ANNUAL MEETING
Saturday May 2nd (and evening of Friday May 1st)

Social Gathering May 1st: Friday's social gathering will be held in the Click Alumni Hall located at the North end of the Student Alumni Center: 201 ConocoPhillips OSU Alumni Center, Stillwater, OK 74078

Friday, May 1st 6:00 p.m.-9:00 p.m. Social hour and dinner, cost is \$40 per person. Spouses are welcome to attend.

Saturday May 2nd: Annual Meeting will be held in 416 Case Study Room 3 located at OSU Student Union Center. CLE Credits: 5

9:00 a.m.-11:45 a.m.
(Two 10 min. breaks)

Team Work in Motion: Donna Smalldon of Portland, Oregon, joined by Barbara Ann Bartlett, of Tulsa, OK, and Claudia Arthrell of Tulsa, OK, will present "How the Team Works in Motion". Learn how to make the team an integral part of the collaborative process as it is meant to be. Build trust in the team and in the clients. Learn how to communicate effectively to become a valuable collaborative team member.

11:45 a.m. - 12:35 p.m. **Resources Available to the Collaborative Professional Nationally and International:**
Talia Katz, JD, Executive Director of the International Academy of Collaborative Professionals will present a how-to guide on accessing the wealth of materials available to us. We are not alone in our quest to become collaborators. She will discuss everything from individual marketing strategies, to how to be better practitioners.

12:35 to 1:45 p.m. **Lunch (provided) and discussion – how can OACP and IACP work to help you**

1:45 – 2:45 p.m. **Introducing Coach Protocols:** At the last annual meeting we discussed the role of coaches and how they are essential in every case. Now we have drafted the protocols for coaches on the team. These protocols will be presented by Barbara Ann Bartlett of Tulsa, OK, Claudia Arthrell of Tulsa, OK Sarajane White of Tulsa, OK, and Jacquelyn Cleary of Tulsa, OK.

2:45 p.m. – 2:50 p.m. **Break**

2:50 p.m.-3:30 p.m. **Launch Mentorship Program:** Have you entered the collaborative practice but haven't had your first case? Have you started the collaborative practice but aren't comfortable with the fit? Collaborative practice is different from mediation and certainly different from the strong-arm negotiation of litigation. Start your collaborative practice out right by joining our mentorship program. In our mentorship program, newcomers will be paired with more experienced professionals.

Saturday's events are at no cost to OACP members and those attending training on Thursday and Friday

HOTEL RESERVATIONS: Reservations for the Atherton Hotel may be made by phone or online. Room rates are \$93 per night.

To reserve hotel rooms by phone call 405.744.6835. You will need to tell the reservation specialist that you are making a 'group booking' and give them the group booking code "OACPA".

To reserve hotel rooms online go to www.AthertonHotelatOSU.com, select 'online reservations', then select 'group booking', enter your arrival date and number of nights, then you will enter the group booking code "OACPA".

A hot breakfast bar is provided by the Ranchers Club for all Atherton Hotel overnight guests.

****IMPORTANT:** **The hotel will only guarantee rooms through March 30, 2009. After March 30, reservations will be given on a first come first serve basis. Get your reservations in early.**

**OKLAHOMA ACADEMY OF COLLABORATIVE PROFESSIONALS'
2009 ANNUAL CONFERENCE AND TRAINING April 30-May 1**

FULL NAME: _____

FIRM: _____

ADDRESS: _____

_____ City State Zip Code

PHONE: (____) _____ - _____ **EMAIL:** _____

I WILL ATTEND THE FOLLOWING EVENTS:

_____ **APRIL 30-MAY 1, 2009 TRAINING, ENCLOSED IS MY PAYMENT OF \$350 (\$375 IF PAYING AFTER APRIL 25TH)**

_____ **I WILL ATTEND THE FRIDAY, MAY 1ST SOCIAL GATHERING, ENCLOSED IS MY PAYMENT OF \$40**

_____ **I WILL ATTEND THE SATURDAY, MAY 2ND ANNUAL MEETING, FREE TO MEMBERS AND TRAINEES**

MAIL REGISTRATION AND PAYMENT TO: NOVELL WILSON AT 1831 E. 71ST, STE. 304 TULSA, OK 74136

Please direct all questions to Barbara Ann Bartlett, email: bab@babartlett.com