

**COLLABORATIVE COUNCIL OF THE REDWOOD EMPIRE
2011 NEW MEMBER APPLICATION**

Name: _____
Firm: _____
Address: _____
E-Mail: _____ Phone: _____ Fax: _____
Profession: _____ License/Certificate #: _____
Specialty _____

Membership Dues (New Members)

New member one-time fee \$25.00
(Membership includes a copy of the book "Collaborative Practice Materials"
by Catherine Ann Conner and Margaret L. Anderson. See the Information Sheet, below.)

Annual Dues: Please select one type of membership below:

- Special Membership (\$ 50) \$ _____
(Law Students, 1st Year Lawyers, Paralegals, Law Office Staff,
1st Year Financial Professionals, 1st Year Mental Health Professionals)
- General Membership* (\$175) \$ _____
(General non-charter members pay for each meeting attended)
- Charter General Membership** (\$670) \$ _____
(Includes prepayment of all Breakfast, Lunch, and Dinner Meetings)

Optional IACP Membership:

- IACP Membership (\$100 with group discount) \$ _____
For CCRE dues paid on or after March 1, 2011, IACP membership fees
are payable directly to IACP.

TOTAL MEMBERSHIP DUES \$ _____
(Include the \$25 New Member one-time fee)

** See the description of Membership Categories on the Information Sheet, page 3 below.*

*** "Charter Membership" relates only to a payment option. See the description of "Charter Membership" on the Information Sheet, page 3 below.*

COMMITTEES YOU ARE INTERESTED IN LEARNING MORE ABOUT

- Membership Public Relations Protocol Speakers Bureau Estates, Trusts, Civil "ETC"
 Training/Education/Programs Case Facilitation Data Collection

Member Pledge

As a member of the Collaborative Council of the Redwood Empire, I pledge that I will participate fully and in good faith in any case facilitation to which I am invited by another CCRE member, to resolve any disputes or address any issues, including, but not limited to, matters regarding adherence to the Principles and Guidelines/Statement of Understanding, challenges encountered in the case, or any relationships between or among the professionals on the collaborative team.

I also pledge that I will join the Council's Yahoo list serve.

DATE: _____ SIGNATURE: _____

NAME (PRINT): _____

**Please send this completed and signed form,
with check payable to C.C.R.E., to
SUSAN BARRETT, 829 Sonoma Ave., Santa Rosa, CA 95404**

(SEE INFORMATION SHEET, BELOW)

INFORMATION SHEET

Cost of Meetings: Breakfast meetings - \$20, lunch meetings - \$35, dinner meetings - \$50 (Breakfast meetings are held monthly, lunch and dinner meetings alternate every other month.)

New Members: New members are **General Members** (see “General Membership,” below) unless **Participating Member status is attained** (see “Participating Membership,” below). **Upon joining**, new members pay a one-time fee which includes a copy of the book “Collaborative Practice Materials” by Catherine Ann Conner and Margaret L. Anderson. For new members wishing to become Participating Members, eligibility to be listed as a Participating Member in promotional materials and to be listed in the Council’s Web Site requires satisfying the training requirements described below.

Special Membership for Law Students, First-Year Lawyers, Paralegals, Law Office Staff, First-Year Financial Professionals and First-Year Mental Health Professionals includes all the benefits of General Membership at a special rate for annual dues.

Membership in the International Academy of Collaborative Professionals (IACP) is required for Participating Members and is recommended for General Members. Your CCRE membership qualifies you for a \$35.00 discount on your IACP dues.

General Membership is for those members who wish to attend dinner/lunch/breakfast meetings, receive discounts on training, and have their name listed as General Members in the Council roster. General Members are not eligible to vote and are not listed on the CCRE website or other promotional materials.

Participating Membership (generally not available for new members). Participating Membership is for those members who complete a minimum level of training in the Collaborative Process, satisfy ongoing training requirements, participate actively in the functions and activities of CCRE, and adhere to the principles of Collaborative Practice. Active participation is defined as attending at least four meetings per year and either serving on the Board or actively serving on a committee, or facilitating two meetings. Benefits for Participating Membership include eligibility to vote, discounts on training, and listing in the Council’s Participating Members roster, website or other promotional materials. If you have questions about becoming a Participating Member, contact Susan Barrett (co-chair of the Membership Committee) at (707) 523-0480 or by e-mail at sbarrett829@clr829.com.

Options for Payment for Meal Meetings: “Pay As You Go” or “Charter Membership.” Charter Membership is simply a dues payment method that includes the cost of all meals. For a flat fee, all meal costs are included for the year. The other dues payment option is “Pay As You Go”, where the member pays for each meal at the time of the meeting.

TRAINING REQUIREMENTS FOR PARTICIPATING MEMBERS:

Threshold Training Requirements for Participating Members (Meeting IACP Standards)

Effective 2010, to become a Participating Member and/or to continue Participating Member status, a CCRE member must have satisfied IACP’s standards to hold oneself out as a Collaborative Professional. Those standards vary by profession and are described as follows:

For Attorneys and Mental Health Professionals:

- 12 hours of introductory collaborative training;
- One 30 hour training in client centered, facilitative conflict resolution, of the kind typically taught in mediation training (interest-based, narrative or transformative mediation programs); and
- 15 hours of training, in addition to the 12 hours of introductory training, in any of the following areas: communication skills training; collaborative training; advanced mediation training; or basic professional coach training. Attorneys have the additional option of interest based negotiation training.

Additional IACP Standards for Mental Health Professionals:

- At least 3 hours of training in the law of the mental health professional's jurisdiction. Such training should be in the area of conflict resolution in which the mental health professional's practice is focused, e.g., family law, estate planning, business.

Financial Professionals. Financial Professionals fall into three categories, differentiated by role. The training requirements are different for each role.

Role One:

- Role One is defined as a Neutral Financial Professional as defined by IACP (Full Team Member)
- NOTE TO CDFAs: CDFAs do not meet the IACP standards with that designation alone. If you do not meet IACP standards, you may nevertheless be a Participating Member of CCRE. To function as a Role One Financial Professional, full disclosure that you do not meet IACP standards and consent from the team and clients is required.
- Role One financial professionals must satisfy the same training requirements as attorneys and mental health professionals as described above; and
- At least 20 hours of training in the financial fundamentals to gain a basic understanding of the law in the financial professional's jurisdiction. Such training should be in the area of conflict resolution in which the financial professional's practice is focused, e.g., family law, estate planning, business.

Role Two:

- Role Two is defined as a Neutral Financial Specialist – Business Appraiser – Vocational Specialist – Forensic Accountant
- The training requirements for Role Two financial professionals are:
 - 12 hours of introductory collaborative training
 - 12 hours of mediation training
 - 15 hours of training, in addition to the 12 hours of introductory training, in any of the following: communication skills training; collaborative training; advanced mediation training; basic professional coach training

Role Three:

- Role Three is defined as a Financial Consultant - Realtor, Investments Advisor, Mortgage Broker, CPA, Real Estate Appraiser, Real Estate Sales Professional,

Business Attorney, Tax Attorney or Professional, Insurance Professional, Pension Consultant, other specific financial advisor.

- The training requirements for Role Three financial professionals are:
 - 12 hours of introductory collaborative training
 - 12 hours of mediation training

Ongoing Training Requirements after Meeting Threshold Training Requirements

Effective 2010, once the IACP requirements have been met, in order to maintain Participating Member status, the Participating Member must:

- Complete 24 hours of training every two years.
- 6 hours of the 24-hour training requirement may be met by a combination of attending certain CCRE meal educational meetings (approved by the CCRE Education and Training Committee) or by shadowing.
- There is one-half hour's credit for each one hour of the six hours spent at educational meetings and shadowing. I.e., one-hour of education at a meeting or one hour of shadowing results in one-half hour of credit toward the total 6 hours.
- At least four hours of the 24-hour training requirement must be at a workshop that includes role play.
- Attendance at CP-Cal and IACP workshops/plenary sessions qualifies toward the 24-hour training requirement on the basis of one hour of credit for each one hour of education.
- The ongoing training requirement for the Role Three financial professional will be twelve hours every two years.

The two-year period will be on a calendar year basis. Existing Participating Members will have the option of meeting their training requirement between the two-year period commencing either January 1, 2008 or January 1, 2009. If a member has not completed 24 hours of training by January 1, 2010, that member will have until December 31, 2010 to satisfy the ongoing training requirement and the next two-year period will begin January 1, 2011.

Existing Participating Members who have not yet completed the IACP 15 hours of cumulative training required have until December 31, 2010 to complete the 15 hours.

CCRE will provide six hours of training per year at no cost or low cost.

EXAMPLE OF MEMBERSHIP DUES FOR A NEW CHARTER GENERAL MEMBER

Membership Dues (New Members)

New member one-time fee \$ 25
(Membership includes a copy of the book "Collaborative Practice Materials"
by Catherine Ann Conner and Margaret L. Anderson. See the Information Sheet, below.)

Annual Dues:

Please select one type of membership below:

(Please mark the boxes that apply and enter appropriate amounts in spaces at the right.)

- Special Membership (\$ 50) \$ _____
(Law Students, 1st Year Lawyers, Paralegals, Law Office Staff,
1st Year Financial Professionals, 1st Year Mental Health Professionals)
- General Membership* (\$175) \$ _____
(General/Participating non-charter members pay for each meeting attended)
- Charter General Membership** (\$670) \$ 670
(Includes prepayment of all Breakfast, Lunch, and Dinner Meetings)

IACP Membership:

- IACP Membership (\$100 with group discount) \$ 100
(Required of Participating and Charter Participating Members, optional for
all other membership categories. If on or after March 1, 2011, pay directly to IACP.)

TOTAL MEMBERSHIP DUES \$ 795