

Involving a family consultant in a collaborative case

Collaborative POD training exercise

Introduction to POD training exercises

This POD training exercise is designed to be delivered at POD meetings as part of group work where case studies and role plays are explored.

This POD training exercise is part of a set available.

- Building our inter-disciplinary communities
- Matching our clients to the collaborative process
- Involving a family consultant in a collaborative case

Easily accessible from Resolution Central Office and good value for money, each session is designed to last for 1 hour to 1.5 hours.

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The aim of POD training exercises are to:

- enhance your existing collaborative skills, refresh your collaborative learning, develop new skills with collaborative colleagues in your POD;
- provide tips to take away with practical ideas to enhance your collaborative practice;
- encourage the building of relations with POD colleagues from different disciplines;
- promote team working for the benefit of our collaborative clients and the generation of new collaborative work within PODs;
- promote the development of POD protocols for successful collaborative working.

Acknowledgements

Resolution is very grateful to the following people who have helped produce this pack:

Margaret Kelly
Marilyn Bell
Maura McKibbin

Instruction sheet – Collaborative POD training exercise

- Theme: Involving a Family Consultant in a collaborative case
- Time estimate for duration of exercise: 1.5 hours
- CPD Points: 1.5

This role play pack includes the following:

- Outline of role play session with timing guidelines
- Role play scenario sheet (all delegates to have a copy)
- Instruction sheet for James (husband/father)
- Instruction sheet for Jenny (wife/mother)
- Instruction sheet for James' lawyer
- Instruction sheet for Jenny's lawyer
- Instruction sheet for Family Consultant
- Thought themes / difficult situations for discussion group
- Learning themes/Best Practice guidelines (to be copied for delegates to take away)
- CPD registration form
- Feedback form (for circulation and completion by delegates before they leave)

You will need:

1. Flip chart and pens
2. To photocopy sheets for delegates

How to use this training pack:

- First, it's generally best if one or two volunteers from your POD lead on coordinating the training session.
- The coordinator/s should be familiar with the training outline in advance of the session.
- The coordinator/s have the responsibility to facilitate the session, unless they wish to delegate this facilitation role, to make sure everyone in the POD feels fully engaged and the session keeps to time.
- Where indicated, the coordinator/s should ensure they flip chart main themes and ideas generated by the smaller working groups.
- At the end of the session the coordinator/s should circulate the Best Practice Guidelines for POD members to take away and ensure that the attendance record and feedback forms are completed by POD members and returned to Resolution Central Office.
- The collaborative learning generated by the training session will differ between PODs.
- The training packs are intended to be an introduction to a subject area opening up ideas and dialogue within PODs for further development and training. If POD members have ideas for future training packs, then please contact info@resolution.org.uk.

Outline of Role Play Training Sessions

In advance of the session you will need to recruit the following volunteers and to circulate their role play sheets to them:

1. Jenny, the wife and mother (any member of the POD)
2. James, the husband and father (any member of the POD)
3. Jenny’s solicitor (collaborative lawyer)
4. James’ solicitor (collaborative lawyer)
5. Family Consultant (if POD does not have a member who is a family consultant, an option is to invite a guest family consultant)

To be read in advance by the role play coordinator. Time estimates are for guidance only.

Timing guidelines:

Overall duration: 1.5 hours

Brief introduction and explanation of the session (Jenny and James have already had one four way meeting)	(5 minutes)
Role play of a telephone dialogue between the two collaborative lawyers before bringing the Family Consultant on board to help James and Jenny	(5 minutes)
Role play of the Family Consultant’s first meeting with James and Jenny	(25 minutes)
Give out hand-out ‘Thought Themes’. Group discussion on the issues around ‘thought themes’.	(30 minutes)
Flipchart themes	(15 minutes)
Summary of learning / ideas for development of best practice and circulation of best practice guidelines (led by the role play coordinator)	(10 minutes)

Role Play Scenario: Involving a Family/Child Consultant in a Collaborative Case

Jenny and James have been married for 18 years. They have two children, Sophie who is 13 and Olly who is 6. James moved out of the family home 4 months ago. He has rented an apartment.

Relationship problems first occurred 3 years ago when James had an affair. He and Jenny decided to try to make the marriage work. They attended marriage guidance counselling briefly. It was James' decision to leave home 4 months ago. Jenny realised the marriage was struggling but she would not have made the decision to bring it to an end. James is already involved in another relationship which Jenny believes pre-dates his departure from home.

James is the Financial Director of a large PLC. Despite the recession, business is good and James believes that he is on track to earn a bigger bonus this year than last year. The family have had a good standard of living but spend all that they earn. Jenny is a Managing Director of a small company which she set up 2 years ago when Olly started school. The business is not yet profitable. There is much riding on the business from an emotional as well as a financial point of view.

James found it impossible to support Jenny's wish to establish and grow her business. He would have preferred Jenny to continue to focus on her role as a mother/running the family home and supporting him in his work role. He was also worried about the heavy financial commitment that accompanied this business venture.

Jenny has found it hard to run her business commitments alongside her commitments to the children. She works school hours and struggles for childcare after school and during the long school holidays. Both children are at private school.

She has found it impossible to grow the business without proper childcare in place. She has been reluctant to ask James for help bearing in mind his general feeling about the business.

James and Jenny would say that Sophie and Olly have adjusted fairly well to their separation. The children were very obviously very upset when the news broke but over the last few months, they seem to have adjusted quite well to the pattern of seeing their dad on alternate weekends and one overnight weekday stay at dad's new apartment.

More recently, James and Jenny have become slightly concerned about Olly who is regularly tearful when he is returning home to Jenny after spending a weekend with his dad. Sophie is showing no such signs of distress but Jenny has remarked that Sophie has put on a lot of weight since James left home. James and Jenny have not yet tackled holiday arrangements.

James has instructed a collaborative solicitor. He found out about collaborative process when he attended his first meeting with his lawyer. He is keen to work within this model as he believes it will be best for the children and because it can bring about a speedier resolution. He is keen to move on with his life, achieving a divorce and an agreed financial outcome as soon as possible.

Jenny is also drawn towards a collaborative model and she has now instructed a collaborative solicitor to represent her. She feels that the traditional process would bring out the worst in her and James and would be bad for the children. Jenny is in a different

emotional place. She is struggling to come to terms with the speed at which James wants to move. She feels overwhelmed by the combination of coping with the end of the marriage, creating emotional stability for the children and finding the time to commit to her business. Her confidence and self-esteem are at low ebb.

Jenny's solicitor has suggested to her that she and James might benefit from the support of a Family Consultant. He has mentioned this to James' solicitor who has spoken to James about it. James is more reluctant to go down this road but will agree to try it for the sake of the collaborative process.

He and Jenny are referred to a Family Consultant for their first meeting. The Family Consultant understands that Jenny and James need help following their separation as they are struggling to agree what will work best and it is causing tension between them.

Instructions to James

You and Jenny are attending your first meeting with your Family Consultant today. You have had your first collaborative meeting which you felt went well. You feel a real sense of urgency to move on.

You want to be divorced from Jenny as part of that process of moving forward. You have a new partner, Sarah, who is a permanent feature in your life.

You have known Sarah for at least 12 months and she was the catalyst you needed to take steps to leave home and to end your marriage. Sarah is younger than you and does not have children. You would like her to meet Sophie and Olly.

You are frustrated by the fact that Jenny cannot move on as quickly as you. You are reluctant to involve the Family Consultant but want to cooperate in the collaborative process. You see their role as confined to trying to organise how and when the children move between homes.

You do have some concerns about Olly who is becoming upset when he has to leave you at the end of the weekend stay. You wonder if this is something the Family Consultant might be able to help with. You are concerned about costs.

Your priority is to move forward as quickly as reasonably possible and you do not want to become 'side-tracked with emotional stuff. You do however understand that the Family Consultant may help Jenny to move forward which may, in turn, help you.

Instructions to Jenny

Your solicitor has told you about how Family Consultants can help couples/parents in collaborative cases. You feel positive about involving such a professional. When you and James attended Relate some years ago, you felt that this was a positive step although you did not feel that James was able to benefit from that counselling in the same way that you were.

You are very nervous about the meeting with the Family Consultant today. Your main aim at the present time is to ensure that parental respect is built between you and James. You feel that James is moving on with his life very quickly and cannot understand the haste.

You worry about the children, particularly Olly who seems to be struggling and you are concerned about Sophie's weight gain. You worry that you and James do not communicate well and that the only time to discuss things is when the children are there.

You know about James' new girlfriend but feel strongly that she should not feature in the children's lives at this point. You are struggling a great deal with your own emotion. You feel pressurised. You would prefer to deal with nothing other than arrangements for the children at the present time. You do not want to contemplate divorce (although you accept that the marriage is over).

You do not want to contemplate having to move from the family home which provides stability for you and for the children. You hope that the Family Consultant can help you and James to improve communication and respect both around the children and generally. The future success of your business is of paramount importance, emotionally and financially.

You struggle with feelings of guilt if you are not around to care for the children but you recognise that you cannot run the business and grow it within school hours.

You resent the fact that James has far more free time than you and that the responsibility of organising childcare falls to you alone. You are a strong personality but you are overwhelmed by the strength of James' personality. During the marriage you feel that James' personality has dominated and that your view has been far less important. This has damaged your self-esteem and confidence.

You are suspicious that James' relationship with his girlfriend was his real reason for leaving home and are frustrated that you do not feel that you have been told the truth about this.

Instruction Sheet for Jenny's Lawyer

From the outset you screened Jenny as suitable for working around the collaborative table but comments made by Jenny during that screening process alerted you to the possibility that the relationship dynamic between James and Jenny may present some difficulties within the collaborative process.

Jenny presents as a strong minded lady whose confidence and self-esteem have been damaged by the ending of the marriage.

Trust levels between Jenny and James are at a low ebb due to James' affair during the marriage and his present relationship with Sarah which Jenny believes started before James left the family home.

Jenny feels a powerful need to understand the truth around the timing of the beginning of this relationship and has discussed this with you. You have identified with Jenny a need for her to have personal counselling support and also suggested that some parenting support for Jenny and James going forward would also be helpful.

You believe that support from a Family Consultant will help Jenny to start to rebuild her confidence and self-esteem which will assist the collaborative process generally and help Jenny to address the power imbalance which exists in her relationship with James.

You are to role play a five minute telephone exchange with James' lawyer reflecting Jenny's hopes and priorities when involving the Family Consultant.

Instruction Sheet for James' Lawyer

James is a fairly demanding collaborative client. You needed to screen him vigorously at the outset since he was immediately attracted to the collaborative process due to the potential speed of the process. On balance, you feel that James can rise to the challenge of the collaborative process.

James is in a hurry. He does, initially, struggle to see Jenny's point of view but it is your assessment that, if challenged, he can recognise Jenny's needs alongside his own. James' attitude to the involvement of the Family Consultant is that he will go along with it if Jenny feels that it is necessary but that he is concerned about the cost and potential delay.

You talk to James about the Family Consultant's role being to assist both of them in going forward but not really going beyond that remit.

James presents as a client who is ahead emotionally and who wants to move forward quickly but who is capable of working collaboratively with good support.

You are to role play a five minute telephone exchange with Jenny's lawyer after the first collaborative meeting, reflecting upon James' hopes and concerns for the work with the Family Consultant.

Instruction Sheet for the Family Consultant

You were contacted by James who wanted to set up an appointment for him and Jenny alongside the collaborative process. You have had very brief information from Jenny's solicitor by email (copied in to James' solicitor) identifying James and Jenny's ages and the details of the children of the family.

Early on in your first session with James and Jenny you identify a fairly significant power imbalance and a need to carry out some fairly significant work if James and Jenny are to achieve a good collaborative outcome.

They are in very different emotional places, which is very clear from the meeting. You feel that James and Jenny have different agendas and a different understanding of the work you are to carry out with them.

You have had no other communication from the collaborative lawyers about the interface between your work and the parallel collaborative process.

Thought Themes (difficult situations for discussion groups)

Issues for the Family Consultant and the Collaborative Lawyers

1. How and when might the role of the Family Consultant be introduced to them and might this be different for different cases?
2. How might the role of the Family Consultant be defined for James and Jenny and what information might they understand is to be passed to the Family Consultant before they meet with him/her?
3. How much information should be given to the Family Consultant about the family/couple dynamic in the collaborative process before the work begins?
4. What will the Family Consultant address and how defined should their role be?
5. How best to define the parameters for how the team will work together and when should this happen?
6. What do you think that James and Jenny understand about the interface and feedback between the main collaborative process and the work they are to carry out with the Family Consultant?
7. How far should the role stretch?
8. Dealing with clients who have different agendas?
9. How will feedback happen, if at all? Would a written report be useful/ appropriate? What about the cost of this? Should file notes of meetings be kept/ shared? What about confidentiality?
10. When might a Family Consultant become more directly involved in the collaborative meetings?
11. How would it work if Jenny wanted to see the Family Consultant on her own in addition to the work she and James were doing as a couple/parents?

Best Practice Suggestions

Learning Themes for the Instruction of a Family/Child Consultant within a Collaborative Process

Top tips for a successful partnership:

1. **Consider ways in which you can build an inter-disciplinary community** - be truly collaborative and co-operative
2. **Be clear as to confidentiality and professional beneficial information exchange** with your client, with your collaborative colleague and with your family consultant/s and or other professionals
3. **Work out ahead of time contracting arrangements with your other professional colleagues.** Think carefully about pre-meetings/de-briefings, etc - and the importance of cost efficiency for clients and cost effectiveness for professionals

Feedback form

Please give your assessment of each element of the course by ticking the appropriate boxes below:

A (Excellent) **B** (Good) **C** (Satisfactory) **D** (Poor) **E** (Very poor)

Quality of the training notes	A <input type="checkbox"/>	B <input type="checkbox"/>	C <input type="checkbox"/>	D <input type="checkbox"/>	E <input type="checkbox"/>
Quality of the training content	A <input type="checkbox"/>	B <input type="checkbox"/>	C <input type="checkbox"/>	D <input type="checkbox"/>	E <input type="checkbox"/>
Quality of the training presentation	A <input type="checkbox"/>	B <input type="checkbox"/>	C <input type="checkbox"/>	D <input type="checkbox"/>	E <input type="checkbox"/>
Overall assessment	A <input type="checkbox"/>	B <input type="checkbox"/>	C <input type="checkbox"/>	D <input type="checkbox"/>	E <input type="checkbox"/>
Was the course pitched at the right level?	Just right <input type="checkbox"/>	Too high <input type="checkbox"/>	Too low <input type="checkbox"/>		

Was this presentation helpful to you in working with your other professional colleagues?	
Did the presentation provide you with a clearer understanding of the role of the other professionals?	
Are you clear about how/when you might approach another professional to work with you and your client?	
What else would be helpful?	
For Family Consultants	
Was this presentation helpful to you in working with collaborative practitioners?	
Are you clear about the role you might have with family clients in a legal or collaborative process	
Are there areas which need further clarification and if so, please list:	
What else would be helpful to you?	

Where did you hear about this training? Please tick where applicable:

Resolution mailing
 Resolution website
 POD mailing
 Word of mouth
 Other (please state) _____

Any general comments: _____

Please hand in to training coordinator or send to:

Ideas for Further Training Themes for Collaborative Role Plays (in no order of priority)

- Managing conflict around the collaborative table
- Handling power imbalances around the collaborative table
- Matching clients to our collaborative process and screening
- Moving through impasse at the collaborative table
- Participation agreement
- Anchor aspiration statements - their role in our collaborative process
- Options meetings - the same clients but a different way talking to them
- First meetings: planning and presenting the collaborative team
- Collaborative agendas as a tool for progress
- Working with the Family Consultant - the team
- Working with the Financial Consultant - the team (accountants and IFA's)
- Disclosure and the place for legal advice in collaborative cases
- Preparation for meetings - why does it matter?
- Focusing on our skills of listening, acknowledging and reframing at the collaborative table
- Language and the importance of getting it right in collaborative work