

A Tale of Three Cities:

Starting Your Own Collaborative Practice Group

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So you'd like to start your own Collaborative Practice group? Collaborative professionals in San Mateo, San Francisco and Sonoma who started practice groups in their respective counties offer these tips as you start your practice group.

Getting the Band Back Together: Organize a Core Group

Before you make any public pronouncements or issue invitations to join your group, form a small core group of like-minded individuals to develop the initial principles, framework and documents for your practice group as a whole. Depending upon the size of the group and the initial tasks to accomplish, committees can be created to focus on key areas such as forms/protocols, membership, marketing and governance. The reasons for this are: a) it is easier to make decisions in a smaller group and b) the core group can present the rules and requirements of your practice group to the larger group as a *fait accompli*, rather than getting into a lot of wrangling *en banc* (which lawyers are naturally good at).

Treat the development of your practice group like you would a case that you don't want to end up on the "back burner". Schedule a series of regular meetings, with an agenda for each meeting. It may be helpful to have an event such as a "kick-off dinner" as a deadline to keep the process moving forward at a good pace. Appoint someone to be in charge of reminding everyone else about each meeting with an agreed process (phone calls, group e-mail distribution list, or listserv). Someone should be in charge of recording the decisions you've made and why. Record the institutional memory – latecomers may want to reinvent the wheel and need to know the group thought it through. If you have committees, the core group should meet periodically for reports on progress from the committees.

Adopt a Mission Statement

Developing your mission statement will help your core group to organize the structure of the practice group around shared goals.

Here is the current Mission Statement from the San Mateo Group:

Collaborative Practice of San Mateo County (CPSMC) is a multi-disciplinary association of professionals dedicated to:

- *Assisting individuals, families, businesses and other organizations to resolve disputes without litigation;*

- *Facilitating creative problem solving;*
- *Helping clients to manage the financial and emotional impact;*
- *Providing clients the opportunity to explore options and make choices about the outcome.*

We are committed to:

- *Leading and innovating in Collaborative Practice;*
- *Increasing public and professional awareness of Collaborative Practice.*

Here's the Mission Statement for the San Francisco group, which it borrowed from a previous version from the San Mateo Group:

The essence of "Collaborative Practice" is the shared belief of the participants that it is in the best interests of parties and their families in Family Law matters to commit themselves to a process whereby they resolve their differences with minimal conflict and no litigation. The Collaborative-process is designed to empower the clients to fashion agreements that address their unique concerns and produce results more creative than, and superior to, those experienced by clients in the adversarial process the Collaborative process relies on an atmosphere of honesty, cooperation, integrity and professionalism geared toward the future well-being of the parties and their children.

This Collaborative Practice Group aims to provide the substantive and procedural training to each of its members so that they may offer the Collaborative Process to their clients as an option for resolving their Family Law matters. In addition this Collaborative Group is committed to fostering and providing a community of professionals that will carry out the goals of Collaborative Practice and provide a network of attorneys, coaches, child specialists and financial professionals who are qualified to assist clients in the Collaborative Process.

Here is the mission statement for the Sonoma group:

To educate practitioners, professionals and consumers regarding collaborative conflict resolution.

Decide Whether Your Group Will be Closed or Open

The first decision your core group should make is: will your group be open to anyone who wants to join? Or will membership be by invitation only to a limited number of local collaborative professionals? There are pros and cons to each approach.

Those who favor the closed group approach feel that they need to be able to vouch for every other member of the group, and that the closed group enables a more unified approach that

delivers the Collaborative Practice product as advertised. The trust that is essential to Collaborative Practice can develop quicker in a closed group. The downside to this is that the group usually ends up being quite small, resulting in training that is more expensive and difficult to arrange; further the commitment level sometimes diminishes when a person is invited to join rather than takes the initiative himself or herself to join a group. If there is only one Collaborative Practice group in a community and it is closed, this may heighten the resistance to collaborative practice from those who are not members of the group. Some collaborative professionals argue that the closed group is antithetical to the collaborative spirit.

Those who favor the open group approach believe that the strict requirements for continuing membership in terms of trainings and case conferencing can't help but improve the practice of law in their counties. The membership tends to be larger and made up of people who have come to the group of their own accord, rather than "by invitation only." It is easier and less expensive to arrange training for a larger group. The downside to this approach is that quality control is more difficult, and there is a greater likelihood that the collaborative model might be corrupted.

The San Francisco, San Mateo County and Sonoma County Collaborative Practice groups have chosen to be open groups. The Sonoma County group includes members who participate in smaller "study groups", which can be open or closed, and incorporate some of the benefits of closed groups while enjoying the benefits of the open groups in the larger county organization.

Adopt a Set of Collaborative Documents

Teamwork goes more smoothly with a detailed plan. Well, that seems obvious! However, when many of us started working in the Collaborative Practice model, we only had the barest outline of a plan. Have a four way meeting, debrief, brainstorm options, then negotiate to a resolution. But what do those really mean? What does it mean to "debrief"? When and how does the team of professionals get created? Who meets with whom when? The answers to these questions may not be the same from group to group. However, it is very helpful to have a roadmap that all members of the group have available.

The two key documents your members will need before they start cases are the Collaborative Stipulation/Agreement and the Principles and Guidelines/Statement of Understanding. Don't reinvent the wheel. You can find model documents at the IACP resources webpage. Even so, your core group should review the models and revise them to suit your own styles. The process of reviewing sample forms and revising or developing your own set of documents will help you focus on what Collaborative Practice is all about. Keep in mind, however, that Collaborative Practice is a specific model of practice, and that you cannot change the key components and still call what you are doing Collaborative Practice. The key document is the Collaborative Stipulation or Contract/Agreement, which binds clients and attorneys to staying out of court. Without this provision, you may be practicing cooperatively, which is great, but you are not doing Collaborative Practice.

In addition to these two key documents, there are numerous other possible forms and protocols which will help guide your members as they start Collaborative Practice. The IACP

resources webpage has sample forms and protocols. Many groups revise forms and protocols from other groups or create their own. The Sonoma County group created a book of forms and procedural checklists for use in collaborative family law cases. All members receive a copy of the book upon joining, which helps to create consistency when working together. When we meet with collaborative colleagues to plan the first four way meeting, we have a list of possible agenda items to review and edit. When we debrief, we can look at a debriefing checklist to make sure we haven't forgotten something. Check out the various samples and customize them for your group.

Governance and Leadership

A thriving Collaborative Practice group is built upon the foundation of good governance and strong leadership. The core group and eventually the entire membership must decide upon the governance structure and decision-making process. Typically, a transition is made from business conducted by the whole group (sometimes to the point of exhaustion or boredom) to business delegated to committees while the group meetings are more focused on education.

When the first wave of members welcomes the second wave, that is usually a good time for the group to transition to the executive committee style of management. In short, when the group spends less time on the minutiae of meetings and how best to gather, and more time on the skilled practice of Collaborative Practice, the group can and should recognize that it has taken another giant step forward. For the San Mateo group, an all day retreat was such a step. We no longer focused on how to recruit members and the criteria of maintaining active membership, and we focused instead on conduct of four-ways, language and communication skills, and generally the upscale practice of Collaborative Practice.

In San Mateo, after the experiencing the challenges of business by the whole group (creating a zebra - by a committee designing a horse), we switched a couple of things at the same time. First, we transitioned to a co-presidency from a single person acting as president. The terms of the co-presidents overlap. There is always one attorney, and preferably the attorney's co-president is drawn from one of the other professions. Of course, since the attorneys outnumber the other professionals by a substantial margin, we will either have to periodically have two attorneys as co-presidents, or the other professionals will have to take far more turns than will be acceptable.

We also switched to management by the Executive Committee. This Committee is composed of the two co-presidents, the immediate past-president, the Secretary, the Treasurer, and the Chair of the Membership Committee (also known as the "Compliance Czar"). The Exec Comm meets bi-monthly for breakfast, and essentially manages the mundane decisions based on voices heard from within the group. As a result, our group's monthly meetings can then be devoted to training or case conferencing, and are no longer consumed with endless debates about how best to proceed and grow our group. This step is a positive sign of our (or any) group's evolution. The Exec Comm periodically reports back and obtains the consent of the

group as a whole; the decision-making process is now much more streamlined, efficient and productive.

In addition, everyone in the group at large is obligated to join at least one of the standing committees: Membership, Mentoring, Public Education, Training, Protocols, etc. In this way, everyone participates actively, gets to know others in the group, and the workload is shared.

The San Francisco Collaborative Practice group has three officers: a chair, a treasurer and a secretary. Most of the work is done through our committee structure. We have an executive committee, or steering committee, which makes the critical day to day decisions to be presented to the group for consensus, such as membership, dues, retreats and such. We have a meeting committee that plans and runs all of the monthly meetings so that the president need only preside over the business aspects of each meeting. Other committees are retreat, training, marketing, website, protocols and judicial liaison. Although we don't have a formal structure in place for election of officers, the committees are repopulated during our annual retreat.

Sonoma County has a board of ten directors and four officers (President, Vice President, Treasurer and Secretary) that are elected annually by the participating members. Each of the directors is a member, and often the chair, of one of the committees. At each board meeting, committees report about their activities and seek guidance or authority as needed. Policy decisions are made by the board, after recommendations from the committees. The board has an annual retreat to set the direction for the group for the coming year. Participating members are required to contribute to the group's activities, with the most common method being committee membership.

A plan for development of new leaders is an important component of a thriving Collaborative Practice group. A group that is governed by the same core group for many years will not flourish in the same way that a group that combines experienced leadership with developing leaders. Groups who have leaders who are willing to become wise sages as new leaders develop create the opportunity for a stronger center.

Will Your Group Align With the Bar Association?

Will you be an adjunct of your local bar association or will you be independent? The advantages to being a part of your local bar association are that they will collect your dues, send out your notices, arrange for places for you to meet, arrange for MCLE credit, and so forth. There also may be added credibility by the connection to the bar association.

The disadvantage is that many bar associations collect fees for the bar association generally, will apply your fees to the "pot", and will not allow you to disburse your own fees as you see fit. Some counties will impose their own standards on the group, and every training, meeting, and notice will have to be submitted and approved in advance. Some bar associations have limitations on non-lawyer members.

Neither the San Francisco nor the San Mateo groups is associated with local bar associations, preferring to have more administrative and internal control. The Sonoma County group started as a section of their local bar association, but later became an independent organization when an interdisciplinary group was started.

How Will Your Group Coordinate With the Court?

Why get the Court involved? The idea is to keep people/cases out of court. Nonetheless, all of us believe that it is important to let our judges know that we were working on a model that keeps people out of court. But be sure that the Court's role does not include third party decision-making. Find out what else you can do for the Court, and what the Court can do for you (which, in the case of many groups, is nothing!)

The San Francisco core group met with the presiding family law judge before their first organizational meeting, with encouraging results. She was and remains wildly supportive about the concept; she immediately designated her own department as the Collaborative Law Department such that all collaborative stipulations and judgments will come directly to her. For several years, we were given the use of her courtroom for our regular monthly meetings. She wrote an endorsement of the concept for use in the groups' materials and on its webpage. She and one of the other family law commissioners attended the first organizational meeting of the group, giving Collaborative Practice the enthusiastic imprimatur of the court. She participated in and endorsed the adoption of a local rule. In return, the group is sponsoring a low-fee collaborative panel, which will be one way its members who are new to Collaborative Practice can get experience, help folks who would otherwise be pro-pers, and thereby assist the Court with its pro-per litigant load. Be sure, however, not to take this support for granted. You need to keep encouraging and watching out for the support of your local judiciary – it can slip away, as San Francisco found out to its surprise and dismay when the local rule and Collaborative Law Department suddenly disappeared from the books. The rule is back, but it has been a slow and painful process to restore the many arrangements we'd made with the court.

Early on, the San Mateo group decided we would not involve judges in the operation of our group. After all, CP is offering an alternative to judicial resolution. On the other hand, we take pains to be sure that we inform the family law bench as well as the PJ and Asst. PJ regarding our group's existence and progress. In July 2006, shortly after the then most recent rotation of new judges onto the family law bench, our group hosted a luncheon for a limited number of judges. Our group as a whole did not attend: we had the co-presidents, and two professionals from each stripe: legal, mental health, and financial. Each of the professionals had one person who informed the judges about the evolving role of his or her profession, and the co-presidents informed the bench about the group's evolution, stressing our continuing commitment to continuing education and the value of CP to a divorcing couple.

For a few select judges who could not attend the luncheon, generally those who had at one time served on the family law bench or were in the chain of chairs, we sent delegations to their

chambers. The delegations were comprised of an attorney (who knew the judge) and a member of one of the other professions in our group.

The goals were to impress the judges with our group's commitment to appropriate resolution techniques, and the notion that we were not soliciting referrals. We simply were reflecting and fulfilling our bench's commitment to the public policy of settlement in lieu of litigation. The Sonoma County bench has been very supportive of Collaborative Practice. A local rule was adopted for expedited processing of papers in collaborative cases and excusing the first appearance fee for the Respondent when the collaborative stipulation is signed. The court periodically provides information about ADR, including Collaborative Practice, to litigants. The court invited our group to make a presentation about Collaborative Practice at the annual bench-bar retreat. We have also invited the judges to attend trainings as guests and the family law commissioner attended ten classes of our year long training series. She will be serving as the case management bench officer, so it is likely she will encourage the use of Collaborative Practice. As a result of her encouragement, two other bench officers are now attending trainings.

What are Your Requirements for Membership?

Distinguish between requirements for *membership* and requirements for *continuing membership*. Will you have requirements that your members must meet *before* they are included in the group roster? Or will you give new members a grace period in which to fulfill their requirements? Does your group believe philosophically that mediation training is a prerequisite or will strictly Collaborative Practice training suffice? Will you limit your group to members of your own county? Are you limiting your membership to attorneys? Bear in mind, a lot of MFCC's/LCSW's do mediation. Many Collaborative Practice groups are interdisciplinary with members from legal, mental health and financial backgrounds. Some groups limit members to professions that meet the IACP standards, while others allow a broad range of professionals to join.

San Francisco has two levels of membership: "web" membership, which is probationary and renewable each year predicated on whether or not the member has met the requirements for the year. The preliminary requirement is one intensive mediation course taken within a reasonable time preceding of the member's joining the group. The annual requirements for continuing membership are: Membership in IACP, attendance at 3 of the group's monthly meetings, completion of at least one CL training per year and additional hours from activities such as a low fee collaborative case, attending additional meetings or trainings, giving trainings, mentoring or attending IACP networking forums and activities. Those members who either cannot or choose not to fulfill these requirements do not appear on our website as members of the group, but are "associate members" who are welcome to come to our meetings, trainings and activities. We are contemplating a third level for active members who make significant contributions but who cannot become web members because of their degrees, specialties, etc.

In San Mateo, anybody in the bar association can join, as can licensed professionals in allied or interested professions, so long as (1) they have completed not less than 20 hours of mediation training, (2) have obtained (or commit to obtaining within the year) not less than 20 hours of basic collaboration training, (3) they agree to comply with the Principles and Guidelines of Collaborative Practice, (4) a substantial portion of their professional practice relates to family law, (5) their license is active and in good standing, (6) they attend not less than six of our monthly meetings, (7) attend not less than six hours of CP or mediation training each year, and (8) they pay annual dues and a "Buy In" that matches the amount spent by the earliest members to create brochures, obtain a website, and generally get the group off the ground.

A member can only be listed on the website, and can only hold himself/herself out to the public as member of our group so long as they comply with all of the above. The Membership Committee is charged with overseeing compliance, and drops from the website anybody who falls behind in one of the categories required for continuing membership.

The Sonoma County group has two membership levels. Anyone interested in Collaborative Practice can join as a general member. Members who meet specified training and participation requirements similar to the other groups are "participating members" with greater responsibilities (service to the group) and benefits (listing on the website, voting.) Participating members who fail to fulfill the requirements lose their participating membership status and benefits.

Most groups fund a significant part of their activities (notices, website, mailings, etc.) through membership dues. The group will need to set a dues structure and determine any other sources of income. Some groups plan to charge enough for trainings to create a surplus for other group activities. The Sonoma County group has generated income from the sales of the forms and procedures book. Some groups have occasional assessments for special activities such as a marketing campaign.

Purging Your Membership

This is the most difficult of all decisions, one that gets postponed and ignored even when the standards are in place. The easiest method is to enforce the criteria for continuing membership. Then the group's risk is limited to one year of an offensive member if the membership generally is limited to one year. There will be members of your group who don't fulfill the requirements each year, and if they don't, you must be firm or the group will suffer. So be sure the membership agreement specifies that this is the case. Each of these groups monitors members' compliance with the membership requirements on an annual basis and membership is renewed each year.

The more difficult situation will be when members are hard to collaborate with, don't want to practice the model, or just don't know how. This will wreak havoc in your group, and will damage the public perception of Collaborative Practice, not to mention making your own lives miserable.

So what do you do? The San Francisco group originally set up a panel of mentors who had done at least five collaborative cases and who have had formal collaborative training. Although these panelists were available at any member's request to sit in on a collaborative meeting and to debrief with the collaborative team afterward, no requests were ever made. The mission of such a panel is to provide guidance, not to sit in judgment. The group is rethinking its member review policies, but is finding generally that the requirements for continuing membership and the steady progress toward expertise and quality practice by our core members is resulting in self-selection and obviating the need for a formal purging process.

The Sonoma County group has a "Case Facilitation Committee" whose assistance can be sought in a particular case or in the event of ongoing conflicts between members. Members volunteer to meet for two hours with the affected members and facilitate a conversation. A common use of the committee is to debrief a case at the end and help explore the "lessons learned."

The procedures for a closed group should be very well-defined, as it is probably more difficult to "purge" a member who has been specifically invited to join.

Most groups' experience with this issue has been that members who are unwilling to devote the necessary time for the training or to follow the model get bored with it and drop out of sight. Or they lose interest as they cannot build a practice since the more committed members are less likely to refer cases to them.

Training Your Members: How Do You Implement Your Mission Statement?

Monthly meetings:

Periodic meetings are the backbone of the group. Meetings are a place for members to get to know each other, to educate themselves and to plan group activities. You will need to decide how often you will meet, what will be the agenda of your meetings, and how will they be run.

The San Francisco group has at least nine meetings a year in the conference room of a large San Francisco firm. The first half of the meeting is devoted to a presentation or case-conferencing, leaving twenty minutes for business at the end of the meeting. We have an annual retreat which revitalizes the group, and occasional social occasions, which the authors of this article agree are critical to building trust through friendship.

The San Mateo group as a whole meets monthly, and the various committees meet when and as needed. We agree that at least one wholly social meeting a year is in order. After all, we all need to have positive working relationships with everyone else in the group. The social meeting is a good place to engage in some sort of icebreaker that allows us all to learn more about each other, build personal relationships, and thereby build professional relationships that will serve our clients.

The Sonoma County group meets twice a month as a whole group, once for breakfast, which includes a presentation by a member on an educational topic, case study, public education, protocols, etc., and once for lunch or dinner, typically with a longer presentation by an outside speaker on a topic related to collaborative practice. The dinner meetings are preceded by a social time in which members can get to know each other. All business of the group is conducted in committee meetings, either by the Board of Directors or one of the ten committees.

Trainings:

Have a plan in place before your first organizational meeting for mandatory initial training for the group as a whole, perhaps a facilitator for the first organizational meeting. There are many collaborative trainers listed on the IACP website, with information about their trainings and qualifications.

Some questions to consider: What role will your group play in training your members? How often will you sponsor trainings? Will you sponsor your own ongoing trainings after the initial series or will you refer members to trainings sponsored by other groups?

Many groups have found that initial trainings limited to the group members are an excellent way to build group cohesiveness and trust. After the initial trainings, it can be invigorating to open the trainings to members from other groups and "cross-pollinate" ideas and resources. Sponsoring trainings from different trainers is an excellent way to create a firm foundation for your members. While the trainings can sometimes overlap in content, each trainer brings his or her special focus and emphasis. There are an abundance of useful concepts that will improve the Collaborative Practice skills of your members, including different communication systems, team dynamics, and different practice models.

In an interdisciplinary group, professionals can sometimes assume a greater knowledge of their profession than the other professionals actually have. Or there may be inaccurate assumptions about what someone else does. And even worse, different professionals may attach different meanings or procedures to the same concepts. Members can help to educate each other about what they do. Lawyers can describe the legal dissolution process from beginning to end and their role in it. The coaches can describe and demonstrate their work with the client. The financial specialists can describe their process, show sample reports and explain them in detail. By learning about the work of the other professionals in depth, we are better able to describe the potential benefits of other professionals to our clients, we are better able to integrate and coordinate our work, and we are less likely to make mistakes based upon a misunderstanding of what we think someone else will or won't do.

It's unlikely that all practice group members will be able to attend all of the available trainings. However, the highlights can be shared. Members who attend trainings or conferences can present the best ideas and concepts at a group meeting. While it isn't as comprehensive as the

actual training or conference, it exposes the other members to the ideas and techniques presented at the training and motivates them to seek additional training.

Small study groups are another opportunity for member education. We sometimes get so caught up in practice group business that we miss the opportunity for in-depth discussions. Also, in larger groups, a meeting of 20 to 40 people makes it difficult for everyone to participate. Study group discussions of 6 to 8 people for 1 ½ to 2 hours can create an opportunity for exploration of questions arising out of Collaborative Practice. One format a Sonoma study group has successfully used is rotating facilitation with the facilitator responsible for preparation of the topic, making a brief presentation and leading the discussion.

Getting Started: The First Organizational Meeting

When your core group has made all of the above decisions about the group, it is time to throw it open to the public or to invite the rest of your members to join.

If you are starting a closed group, this decision has some interesting aspects. How big will your group be? Will you have an absolute cap? An absolute minimum? Will you be inviting members because of their reputations in the community, their ability to attract cases and their ability to add stature and respect to the group? Or will they be chosen simply because they have a proven record of a work style consistent with Collaborative Practice?

Or will you allow collaborative professionals to self-select? Sometimes, the formation of the group can be the opportunity a litigator is looking for to change the style of his/her practice from litigation and competitive negotiation to collaboration with its core of cooperative negotiation. Moreover, bear in mind it takes two to collaborate. You need a good-sized group from which the public can select.

Ideally it would be some combination, but there will be some folks who would add immeasurably to the group but might be relatively unknown, and some prominent folks who won't have the energy to keep up with the training or won't have the commitment to the model that you will need to succeed as a practice group. Be sure you know what your criteria is, so that you don't wind up trying to herd goats uphill to get anything done in your group.

For the open group, it is a matter of getting the word out, both to professionals you have identified as promising prospective members and to others in the community that might be interested.

The San Francisco group arranged the meeting time and place with the judges, and then put a paragraph in the section newsletter announcing the meeting. Since several members of the core group are in the same office, their staff faxed an announcement to every member of the Family Law section the week before the meeting. Approximately 25 people attended the first meeting.

The Sonoma County group planned a “kick off dinner” and invited any local legal, mental health or financial professional that the core group believed might be interested. Over 100 interested persons attended the meeting. The membership since the first year has ranged from 70 to 80 members.

Getting the Word Out to the Public

The question we hear the most from wannabe collaborative professionals is: “where do the cases come from?” This of course is a topic for another discussion, but is relevant to the commitment of your practice group to public education - both financially and in terms of personal time and effort. How do you get the word out to the public? Generally, public awareness of Collaborative Practice is growing through mailings to targeted potential referral sources, networking by collaborative professionals with referral sources, open houses or seminars for allied professionals, websites, published books, newspaper and magazine articles, the distribution of the IACP brochures and materials, the dissemination of the Collaborative Review, the inclusion of Collaborative Practice in general ADR and family law seminars, radio shows, and law review articles.

One strategy used by many groups to inform the public is to send speaking teams to fraternal organizations, professional groups, and service clubs. We always send at least two members, if not three, and try to avoid having two members from the same profession. We want to make it clear to the audience that we are there to promote the availability of our process, and not to promote an individual. We initially had brochures for our groups, but now we use the IACP brochure. The speakers use the IACP backboard as their backdrop, trying to emphasize the universal scope of Collaborative Practice and the momentum of the “movement.” Another method is to focus the presentation on conflict resolution skills and then provide information on conflict resolution processes. This provides immediate value to the audience as well as providing them with conflict resolution resources for the future.

Practice group members can work together on many of these activities, from creating an attractive, well-registered and well-published website to creating events for local referral sources to purchasing IACP materials in bulk. The website should include the collaborative documents for downloading, articles for people to read, a list of your members with whatever blurbs they would like to include, and other resources for the visitor to your site.

Many professionals are not very knowledgeable about how to build a practice and help spread the idea of Collaborative Practice. A Public Education/Marketing Committee can first educate themselves about the most effective ways to develop a Collaborative Practice and then educate other members. The Sonoma County group conducted a three part breakfast series on developing a Collaborative Practice as well as including a significant component on practice building in our training series. A Public Education/Marketing Committee can also develop a public education campaign for their group, with activities such as speaking engagements, mailings and open houses.

One “tipping point” that everyone in the group needs to be aware of and to practice is this: at some point, all of the Public Education will pay off and clients will call one of the professionals. We all need to recognize that we must switch from marketing to sales. Get those clients and their spouses enrolled in the Collaborative Process, and do a good job for them and their family. Providing the highest quality service is one of the best types of public education.

As the Collaborative Practice movement is reaching a “tipping point”, public education is an ongoing effort that requires a long term commitment by all practice group members.

Get to Know Each Other

Last, but certainly not least, get to know each other. Trust is a fundamental component of an effective collaborative team. Trust builds in many different ways and one way is just simply getting acquainted. At one group retreat, we spent an hour just getting acquainted by finding out about everyone's favorite books, hobbies, and odd unique eccentricities. The Sonoma group's monthly dinner meetings include a half hour social time before dinner. We had a group trip to hear one of our members sing at a local bookstore. Having these various opportunities to interact has strengthened our bonds with each other and within the group. We know that if a problem develops between colleagues, we will be able to work it out because we know and trust each other. And that, ultimately, is the best guarantee that we will be able to maintain an effective team for our clients.

In Closing

Frankly, getting a group started and then maintaining it takes a lot of leadership and effort, but is incredibly rewarding. You will be the cutting edge; you will be the leadership who is evolving the practice in your area. But you can't do it alone. You will need a small, dedicated core of people to keep the ball rolling, so choose wisely!