



COLLABORATIVE ROSTER SOCIETY

“Confidence in Quality”

Stephanie Fabbro, *President*
Patti Daum, *Treasurer*
Justine Mercer, *Past President*
Anna Silver & Anne DeMeulemeester, *Co-Chairs of Membership*

Nancy Cameron, KC, *Honorary Advisor*

Yuval Berger, *Director at Large*
Abby Petterson, *Director at Large*
Jonathan Lazar, *Director at Large*
Kirstin Menzies, *Director at Large*
Chantal Cattermole, *Director at Large*
Tanya Chamberlain, *Director at Large*

BC COLLABORATIVE ROSTER SOCIETY (the “Roster”)

DIRECTORS REPORT 2022:

prepared by Stephanie Fabbro

The purposes of the Roster, as set out in the Constitution, are:

- To administer a roster of Collaborative Professionals who have met a minimum standard of training and experience and who will abide by an established code of conduct;
- To provide educational opportunities for Collaborative Professionals to build skills to assist in providing access to collaborative practice throughout the province;
- To facilitate public access to Collaborative Professionals;
- To promote the expanded use of collaborative practice in dispute resolution; and,
- To enhance the profile and credibility of collaborative practice in the province.

The “Vision” of the Roster is to transform how conflict is resolved in British Columbia through Collaborative Practice.

The “Mission” of the Roster is to maintain and support a roster of qualified professionals in British Columbia dedicated to excellence and respect in the healthy resolution of disputes in our communities.

In 2013 the Board developed a Strategic Plan which has been revisited and updated by the Board, including at the board retreat of 2018.

The 3 key objectives of the Strategic Plan are:

- Supporting professional excellence;
- Increasing public awareness and use of collaborative practice; and,
- Strengthening organizational capacity.

DIRECTORS AND COMMITTEES IN 2022

Membership Committee: Chairs: Anna Silver and Anne DeMeulemeester, **Members:** Kirstin Menzies, Abby Petterson, and Kelly-Anne Breen

Policy & Practices Committee: Chair: Anne DeMeulemeester, **Members:** Stephanie Fabbro, Justine Mercer, Kirstin Menzies, Yuval Berger, Abby Petterson, Bev Churchill, and Rebecca Stanley

Access to Collaboration Committee: Chairs: Tanya Chamberlain and Jon Lazar, **Members:** Yuval Berger, Rena Chen, Michelle Kooy, Andrea Glen, Jennifer Woodruff, Jennie Weeks, and Angela Atwood-Brewka

Training and Education Committee: Co-chairs: Abby Petterson and Chantal Cattermole, **members:** Yuval Berger and Stephanie Fabbro

Coaches Committee: Chair: Yuval Berger, **Members:** Abby Petterson, Jamila Hilborn, Marcelle Blancato (TBD:Heather MacKay)

New Provincial Court Rules Committee: Chair: Justine Mercer, **Members:** Yuval Berger, Jon Lazar, Tanya Chamberlain, and Nancy Cameron, K.C. (Honorary member)

Website Committee: Chair: no committee

In 2022, we created a Financial Subcommittee: Chair: Patti Daum, **Members:** Stephanie Fabbro, Anna Silver, Anne DeMeulemeester, and Justine Mercer

COVID-19:

The COVID-19 pandemic is still impacting collaborative practice.

Many Collaborative Professionals continued to meet remotely in 2022 and we have learned that Zoom meetings can be an effective tool for assisting families within the collaborative process; but there is no replacement for in person meetings.

In 2022 the Board met remotely throughout the year, except for the AGM on November 17, 2022.

A YEAR IN REVIEW:

- Total Members of Roster as November 11, 2022
Total 2022 numbers: 40 (30 lawyers, 8 MHP, and 2 financials)
We had 40 in 2021 and 34 in 2020.
- Collaborative FLO Working Group as at November 11, 2022 (65) (*Up from 52 in 2021 and 30 in 2020*)
- Roster Bank Balance \$112,220.59 as at November 11, 2022, \$92,043 as at October 31, 2021 \$54,752 as at October 21, 2020

- Hazel Russo joined the Roster in 2022 as the Roster Administrator, doing administration and management of the Pro Bono Project, and she is doing an excellent job supporting the Board.
- Three Pro Bono files were opened in 2022 (1 withdrew and two pending). This brings the total files we have opened to 31 through the Pro Bono Project. We continue to struggle to find families interested in the Pro bono project. The law foundation provided a \$30,000 grant to the Roster to assist with this project.
- *Nancy Cameron, K.C. Prize in Family Law*: The \$2,000 prize offered annually by the BC Collaborative Roster Society in honour of Nancy Cameron, K.C. (B.F.A. 1984, LL.B. 1987) for a J.D. student who has excelled in a clinical course with a focus on family law was awarded to a UBC student. (to be onfirmed)
- The Policy and Practice Committee is actively revising and creating precedents. They completed the onerous task of completing revising the Coaches' Participation Agreement, both the one coach model and the two-coach model.
- The Training and Education Committee held three trainings in 2022. All of the trainings were free to members of the Roster and all trainings were well-attended. Revenue from training in 2022 was \$850 for Todd Bell training, and there will be some minimal revenue from the two other trainings.
- The New Provincial Court Rules continued to have ongoing communication with contacts at the Provincial Court Justice Access Centres (Stephanie Smith Turpin and others) about further webinar trainings of Justice Access Centre staff on Collaborative Process.
- The Website Committee was dormant this year.
- We created a new subcommittee on Financial Experts.

STRATEGIC OBJECTIVES OF THE ROSTER

1. Supporting Professional Excellence:

The Roster has met this objecting by participating in the following initiatives:

- a. Connecting Collaborative Professionals through the Family Law Organizer.
- b. Offering training to not only Roster members but all Collaborative Professionals, in areas of collaborative practise, substantive law, and ethics.
- c. The creation of standardize precedents for all Collaborative Professionals in British Columbia.
- d. Connecting with other practise groups in the province, including Collaborative Divorce Vancouver, the Vancouver Island group, the Okanagan group and connecting with recently trained graduates in the Interior.

- e. Submitting content to the Collaborative Divorce Vancouver for publication in their monthly newsletter.
- f. Maintain a relevant and information Website.

2. **Strengthening Organizational Capacity:**

The Roster has met this objective by participating in the following:

- a. Created a new membership category to allow for part-time members. The Roster is committed to retaining our senior members who may not be working full-time but still work within the Collaborative Practice;
- b. Reached out to mental health professionals directly to encourage them to join the Roster or take the basic training, if they have not already done so;
- c. Created a community for mental health professionals by hosting the annual Coaches Retreat;
- d. Maintaining a strong balance and we continue to be in a good financial position thanks to income generated by from training and the B.C. Law Foundation grant awarded to the Access Collaboration Project instituted by the Roster. As we were not able to meet in person over the past year, we saved significantly. Our meeting and travel costs were much less than in previous years.
- e. Maintaining a healthy board. All directors are actively participating and contributing to the overall functioning of the Roster.
- f. Increasing the number of new members.

3. **Increasing Public Awareness and Use of CP:**

The Roster is striving to meet this objective by participating in the following:

- a. Offering training at the Justice Access Centre;
- b. Offering pro bono consensual dispute resolution options to parties in the Early Dispute Resolution Project in Provincial Court and coordinating with Access Pro Bono as well as Justice Access Centre staff about our Pro Bono Project.
- c. Presenting on the Pro Bono Project and the difference between mediation and Collaborative Process at Access Pro Bono's Virtual Family Mediation training in March 2021.

COMMITTEE REPORTS:

MEMBERSHIP COMMITTEE – report provided by Anna Silver

We had a successful renewal campaign and aside from our members who retired to whom we wish the best, we are pleased to have retained a strong membership base. Since our last renewal campaign we welcomed two new members to the Roster, one lawyer and one mental health practitioner, and we hope to continue to expand our membership. We are still offering different membership rates for part-time practitioners and mental health professionals and we will continue to evaluate the extent to which different categories or rates of membership may meet our Roster's needs. Our committee, along with the board, will be evaluating the ongoing training requirements for members to ensure our standards reflect reasonable and attainable goals. We appreciate the efforts Roster members have made to grow their collaborative practices and we hope to continue our campaign to increase Roster membership across all practice areas.

Membership Committee: Chairs Anna Silver and Anne DeMeulemeester, **Members:** Kirstin Menzies, Abby Petterson, and Kelly-Anne Breen

POLICY AND PRACTICE COMMITTEE – report provided by Anne DeMeulemeester

This year the Policy and Practice Committee has spent considerable time revamping the Two Coach Participation Agreement; and we have also created a new One Coach Participation Agreement. These PAs are both ready to be circulated subject to the final edit process.

The revamping process led us to make some important changes and clarifications to the Coaches' PAs such as clarifications regarding:

- that the Collaborative Process commences with the signing of the Lawyers' PA, although if a Coaches' PA is signed first the confidentiality provisions and the prohibition on participating in third party reports apply immediately;
- rules around the coaches' obligation to share the reasons for termination with their client and client's lawyer, in the two-coach model; and
- when and how the coaches may continue assisting the parties after the Collaborative Process has ended.

This exercise has taken us longer than expected but it has been valuable and has produced much improved Two Coach and One Coach Participation Agreements.

Policy & Practices Committee: Chair: Anne DeMeulemeester, **Members:** Stephanie Fabbro, Justine Mercer, Kirstin Menzies, Yuval Berger, Abby Petterson, Bev Churchill, and Rebecca Stanley

ACCESS TO COLLABORATION COMMITTEE – report provided by Jon Lazar and Tanya Chamberlain

We have continued our work on the Collaborative Family Law Pro Bono Project, (the “Pro-Bono Project”) including the regular administration of the Project, outreach in the community to educate and inform allied groups about the project in order to increase participation in the program and consideration of the collection of data to determine why participation in the program is not greater. Specifically:

1. On January 12, 2022 we held a Committee meeting covering: the 2021 ‘Charge’; discussing the use/need of an engagement or retainer letter for the financial professionals assisting with Pro Bono cases; updating prior meetings held with Access Pro Bono; and furthering the discussion on how to get more ‘clients’ into the program.
2. On January 21, 2022 Tanya Chamberlain had a Zoom meeting with Veenu Saini from the Law Foundation about the possibility of renewing our 2021 grant from the Law Foundation for 2022. Tanya explained to Veenu that we wanted to increase the participation in the program throughout the province.
3. On March 9, 2022 we held a Committee meeting covering: Law Foundation funding; finding a new ‘admin’ person for the project; discuss the ‘Sandbox’ project (Law Society initiative); and furthering the discussion on how to get more ‘clients’ into the program.
4. On April 1, 2022 Tanya Chamberlain had a meeting with Matt Sims from Standpoint and Avvypro about data collection and its possible use in the Pro Bono project to determine why we are not getting the participation we anticipated.
5. On April 25, 2022 Tanya Chamberlain had a Zoom meeting with Dom Bautista the Executive Director of the Law Courts Center to explain the Collaborative Pro Bono Project for him provide it as an option to members of the public as a resource at his organization
6. On May 20, 2022 Stephanie Fabbro joined Tanya Chamberlain and Matt Sims for a follow up of the conversation about the collection of data for the Pro-Bono project.
7. On June 23, 2022 the Law Foundation gave us a grant of \$30,000 for the period September 1, 2022 to August 31, 2024.
8. On September 28, 2022 Justine Mercer, Jon Lazar and Tanya Chamberlain conducted a Webinar with the Provincial court JAC’s on Collaborative process and the Pro Bono project as an option for parties participating in the early resolution pilot project. The JACs were very interested in Collaborative law generally and the Pro Bono project specifically.
9. We continue to ask members of the Roster and CDV to distribute our Pro Bono Project brochures in the community and to engage in outreach wherever possible.

10. The Pro Bono project opened three files in 2022. One file withdrew from the Project after the first meeting and there are currently 2 files pending. There were an additional 3 files who contacted the project but did not proceed.
11. One of the pending 2022 files is stalled. The team set up meetings twice, and the parties cancelled the day before their first meetings each time. The Coach declined to proceed with the file and it is now on hold until the administrator can replace the MHP.
12. The primary work of this committee for 2023 should be to:
 - I. Increase participation in project; and
 - II. ascertain why we are not getting the participation we anticipated and what if anything can we do to improve this.

Access to Collaboration Committee: Chairs: Tanya Chamberlain and Jon Lazar, **Members:** Yuval Berger, Rena Chen, Michelle Kooy, Andrea Glen, Jennifer Woodruff, Jennie Weeks, and Angela Atwood-Brewka.

TRAINING AND EDUCATION COMMITTEE– report provided by Chantal Cattermole and Abby Peterson

The Training and Education Committee had a busy year this year again and worked to bring new courses to the membership. The courses took place over Zoom as it was determined that COVID was still a concern and that some courses taking place over Zoom actually benefit a wider audience. We had one free course and the rest were paid – all sessions were very well attended. The specifics of the courses are outlined below. In addition to hosting the courses, the Committee worked to solidify the details of the basic training which is set to occur again in person in Q1 of 2023. Matters to consider for next year include – should we offer recordings to be viewed at a later date? should we move to more in-person sessions or is Zoom a better venue going forward? how do we continue to support our senior members and their practice.

Abby and Chantal were the two new chairs with Yuval being the only other member of the committee. The Committee does not believe that more people need to be added to the group and this amount of people suffices to get some creative ideas for sessions as well as execute the sessions. Hazel and/or the admin person is critical to this Committee and Hazel in particular did a fantastic job. This Committee can greatly benefit with the support of the administrator to take on more of the administrative tasks such as booking venues and sending invitations, it makes sense to delegate this work to the administrator and leave the larger planning and idea gather to the group.

Ethics Training: Nancy Cameron KC will host a 90 minute ethics training course specifically designed for all collaborative professionals. This is to take place over Zoom on December 14, 2023. This course has current revenue of \$150 but has still not taken place.

Substantive Law Training: Todd Bell again hosted the Case Law Year in Review on May 11, 2022. In addition to the training which took place over Zoom Todd provided a substantive paper that participants have raved about. This should absolutely be a yearly event if Todd is willing to participate. There were 41 participants and \$850 net revenue. The Committee purchased Todd a thank you gift and it was appreciated and received well.

Advanced Training: Haley Hrymark hosted an advanced seminar on family Violence for Collaborative Professionals. This was again hosted by Zoom and was interactive. The feedback from the attendees was that the subject matter was challenging but extremely helpful and honest. This was a paid course and had 20 attendees and \$100 net revenue. Written materials were provided following the seminar and they were appreciated by all attendees.

Training and Education Committee: Co-chairs: Abby Petterson and Chantal Cattermole, members: Yuval Berger and Stephanie Fabbro

COACHES COMMITTEE - report submitted by Abby and Yuval

In addition to meeting the clinical needs of the collaborative coaches, the coaching committee aims to promote the profession and recruit new coaches.

At the CDV retreat in May 2022, members of the committee offered a learning module to assist collaborative lawyers to refine their messages about the MHP role to clients. This workshop was highly rated and appreciated by CDV lawyers.

A presentation on the role of child specialists was given by members of the committee at a Canada-wide conference organized by CP Canada. It generated interest in other jurisdictions to adopt this model as it is practiced in BC.

To recruit new coaches to the collaborative process, the coaches' committee has reached out to mental health professionals in various organizations.

Coaches on the committee also participated in amendments to the divorce coaches' participation agreement as part of the policy and practice committee. That document is now available for distribution to coaches.

Our committee's top priority remains recruiting new coaches and child specialists to join our practice groups. Out of the three coaches that attended the last basic training, only one has joined the practice group. Some Vancouver Island lawyers are now turning to coaches from Vancouver to fill the void left by the lack of divorce coaches. Currently, our efforts are geared toward recruiting counselors to attend our next basic training in February 2023, and keeping in touch with the attendees afterward.

Most divorce coaches reported having a waiting list of a few weeks to a few months due to the increased need of their services. Most coaches welcome the ability to practice virtually with new coaches particularly excited to have more business from outside the lower mainland. It appears that virtual coaching will continue to be offered to clients as a way of reducing clients' travel time and to allow for clients, outside of the hubs, to access the services of coaches.

Coaches Committee: Chair: Yuval Berger, **Members:** Abby Petterson, Jamila Hilborn, Marcelle Blancato (TBD:Heather MacKay)

NEW PROVINCIAL COURT RULES COMMITTEE – report from Justine Mercer

In 2022, the goal of the Committee was to liaise with province wide registry Provincial Court staff to educate them on CP and CP resources, and support the implementation and roll out of the new Provincial Court Rules which include mandatory CDR.

Tanya and Jon joined this committee as co-chairs of the Access2 Collaboration Committee.

The Committee had ongoing communication with contacts at the Provincial Court Justice Access Centres (Stephanie Smith Turpin and others) about further webinar trainings of JAC staff on Collaborative Process.

On September 28, 2022, Justine, Jon, Tanya and Yuval presented a province wide webinar to mediation staff at numerous JACs. Justine and Yuval spoke about CP, including how it differs from mediation and detail about the work of coaches in CP. Jon and Tanya spoke about Access2Collaboration and how it could be a great resource for the JAC staff. The webinar was well received.

New Provincial Court Rules Committee: Chair: Justine Mercer, **Members:** Yuval Berger, Jon Lazar, Tanya Chamberlain, and Nancy Cameron, K.C. (Honorary member)

WEBSITE COMMITTEE

No committee report

FINANCIAL SUMCOMMITTEE REPORT – report provided by Patti Daum

To be provided

Chair: Patti Daum, **Members:** Stephanie Fabbro, Anna Silver, Anne DeMeulemeester, and Justine Mercer