



## COLLABORATIVE ROSTER SOCIETY

“Confidence in Quality”

Stephanie Fabbro, *President*  
Patti Daum, *Treasurer*  
Justine Mercer, *Past President*

Anna Silver & Anne DeMeulemeester, *Co-Chairs of Membership*  
Anne DeMeulemeester and Patti Daum, *President Elect*  
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 2023:**

*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 2023**

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

Suite 201 – 5027 47A Avenue, Delta, British Columbia, Canada V4K 1T9

**Policy & Practices Committee: Chair:** Anne Demeulemeester **Members:** Stephanie Fabbro; Justine Mercer; Abby Petterson; Yuval Berger; Kirstin Menzies; Rebecca Stanley; Samantha Simpson; Bev Churchill.

**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

**Website Committee: Chair:** no committee

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

## COVID-19 Impacts

Since COVID-19, the Board has continued to meet over Zoom.

We have done some in person training, combined with Zoom trainings.

## A YEAR IN REVIEW:

- Total Members of Roster as November 20, 2023

Total 2023 numbers: 43 (32 lawyers, 9 MHP, and 2 financials)

IN 2022, we had 40 (30 lawyers, 8 MHP, and 2 financials)

IN 2021 we had 40 members and

IN 2020 we had 34 members

- Collaborative FLO Working Group as at November 20, 2022 (69) (*Up from 65 20220*)
- Roster Bank Balance is \$110,527 at November 19, 2023. At December 31, 2022 the bank balance was \$139,264.
- Hazel Russo continues to work as the Roster Administrator, doing administration and management of the Pro Bono Project.
- One Pro Bono files was opened in 2023. This brings the total files we have opened to 32 through the Pro Bono Project. We continue to struggle to find families interested in the Pro bono project. We received 11 applications and 7 are in the intake process waiting for the opposing party to agree to participate.

**British Columbia Collaborative Roster Society**

Suite 201 – 5027 47A Avenue, Delta, British Columbia, Canada V4K 1T9

- *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.
- The Training and Education committee held two trainings to date in 2023, with Nancy Cameron's Ethics training scheduled for December. We had the Alchemy of Endings which was offered to our members free of charge, so we incurred a loss of \$(1,786). The training was well attended and received positive reviews. We also ran our 3 day Introductory training which had a very high turnout (approximately 55 trainees), on which we generated a profit of \$24,502.
- Two of our members have been Elected in Vancouver County as Benchers – Tanya Chamberlain was re-elected and Nikki Charlton was elected.
- The Policy and Practice Committee is actively revising and creating precedents. They completed the onerous task of revising the Parenting Plan, which is almost completed.
- The Website Committee was dormant this year, but we are in the process of creating a social media presence with the creation of an Instagram and Facebook account which will be managed by James Chen.

## STRATEGIC OBJECTIVES OF THE ROSTER

### 1. Supporting Professional Excellence:

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

- a. We sponsored the IACP Forum in Toronto contributing \$2,500 USD towards the Keynote Speaker. At the Conference we had the following recognition:
  - Recognition in the Forum notebook
  - Recognition on Forum signage
  - Logo and link on IACP Forum Event Page and on Digital Materials
  - Recognition from the stage at the keynote session
- b. Connecting Collaborative Professionals through the Family Law Organizer.
- c. Offering training to not only Roster members but all Collaborative Professionals, in areas of collaborative practice, substantive law, and ethics.
- d. The continued creation of standardized precedents for all Collaborative Professionals in British Columbia.
- e. Submitting content to the Collaborative Divorce Vancouver for publication in their monthly newsletter.
- f. Maintain a relevant and information Website, including creating an online presence through social media accounts.

## 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. Offered training to MHP at discounted price to encourage attendance at our Collaborative Trainings;
- d. Maintaining a strong balance and we continue to be in a good financial position.
- 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. Authorizing a budget to increase Collaborative Practice through social media campaign.

## COMMITTEE REPORTS:

### MEMBERSHIP COMMITTEE – report provided by Anna Silver

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We again had a successful renewal campaign this summer and have not had any members withdraw their membership for retirement or other reasons. Our membership base remains strong, although we continue to have some members submitting their renewal forms and payment late. Since our last renewal campaign, we have welcomed one new lawyer member to the Roster, and we have another new lawyer member who has submitted a partial new membership application.

Our offer of differing membership rates for part-time practitioners and mental health professionals has continued and our members are availing themselves of those rates where applicable.

We have reduced the ongoing education requirement hours and minimum case numbers for members/prospective members outside of Metro Vancouver in the hopes of continuing to grow our collaborative community province-wide.

Our committee has also continued to exercise discretion in respect of allowing renewals for members who may not have strictly complied with all requirements, particularly as it relates to completing the minimum requested number of continuing collaborative education hours in order to maintain a strong membership base and supporting our members who remain committed to collaborative practice.

We hope to continue our campaign to increase Roster membership across all practice areas and in particular to grow our mental health and financial professional representation.

**Chairs:** Anne Demeulemeester and Anna Silver, **Members:** Abby Petterson, Kelly-Anne Breen

### POLICY AND PRACTICE COMMITTEE – report provided by Anne DeMeulemeester

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In 2023 the Policy and Practice Committee's main focus has been to create a new and improved Parenting Plan. This project has been spearheaded by Stephanie Fabbro. Our goal has been to create one universal collaborative Parenting Plan, which includes a variety of optional paragraphs for each (or most) topics, so that the collaborative professionals can easily remove options that are not appropriate for their clients, and assist clients to create their own individualized Parenting Plan. We have focused on providing non-adversarial options for each topic, removing options that are only appropriate in higher conflict families.

We have included appendices that set out:

- various parenting schedules; and
- sample holiday and special event schedules

so that parents can easily see the different options available in order to have discussions about what works best for their family.

We have included cautionary alerts within the document in respect of potentially problematic clauses, in order to help professionals avoid pitfalls.

We are proud of our new Parenting Plan and look forward to circulating it to the Roster Members and the various practice groups.

The next item on the agenda for the Policy and Practice Committee is to revamp the Lawyers' Participation Agreement in order to bring it in line with the new Coaches' PA.

We have also discussed the issue of "apprentice membership" for lawyers and coaches who have taken the Collaborative Training but not the Mediation Training. This is a topic that will need to be discussed by the whole board.

**Chair:** Anne Demeulemeester **Members:** Stephanie Fabbro; Justine Mercer; Abby Petterson; Yuval Berger; Kirstin Menzies; Rebecca Stanley; Samantha Simpson; Bev Churchill.

### **ACCESS TO COLLABORATION COMMITTEE – report provided by Jon Lazar & Tanya Chamberlain**

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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. The Committee met on one occasion during this year. The focus of the Committee continued to be on how to promote the Collaborative Pro Bono Project and increase participation. Hazel Russo, the administrator for the Project has been very successful in following up with perspective client and has increased the professionalism and efficiency of our Project.
2. From January to September 2023 we received 11 applications. One file was opened and has since settled. Three files are currently in the intake stages and 7 applications are still waiting for the non-applying party to confirm their agreement to participate in the program. Ms. Russo will continue to follow up with those 7 applications.
3. We continue to be disappointed with the lack of participation in the Project and will not be seeking further funding from the Law Foundation.
4. At the September 2023 Board Meeting, the Board passed a resolution to mount a social media campaign using funds from the Law Foundation and excess funds in the Collaborative Roster to promote the Collaborative Pro Bono Project. James Chan will be opening social media accounts on LinkedIn, Facebook and Instagram for the Roster. He will create posts to promote the Pro Bono Project centered on a "story". Members of the

Roster and CDV will be asked to promote these posts by reposting on their own social media sites. We are hopeful that by doing so, we will increase the awareness of our project. We intend the founder of the project, Nancy Cameron KC, to be the subject of the first post.

5. Jon Lazar is meeting with the Judicial Access counsellors from the Surrey Provincial courthouse to explain and promote our project.
6. We continue to require more Financial Neutrals and Mental Health Professionals to participate in the Collaborative Pro Bono Project.
7. The primary work of this committee for 2024 should be to increase participation in project by trying to promote it more in the public.

**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**

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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 and in person so that we could reach the widest audience possible and keep costs lower for out-of-town members. 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 2024 and some other high-profile courses for 2024. Lastly, we have secured a three-day mediation training for mental health professionals being taught by Arleen Henry, KC and Carol Hickman, KC, January 24-26, 2024.

Matters to consider for next year include – should we offer recordings to be viewed at a later date? Should we continue to offer Zoom courses? How do we continue to support our senior members and their practice and how do we support mental health professions? What if any additional training is required for financial neutrals.

Abby and Chantal were the two new chairs with Yuval and Stephanie being the only other member of the committee. The Committee does not believe that more people are needed 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. Abby and Chantal can continue as the two committee members should Yuval seek to step down from this sub-committee.

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.



Basic Training This was offered in-person in Vancouver and was well attended. This took place in February 2023 and was taught by Abby Petterson, Yuval Berger, Bev Churchill and Rebecca Stanley.

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.

Alchemy of Endings: This took place for one full day on February 3, 2023 and dealt with grief and the stages and ideas of grief in relation to the end of a marriage. This was hosted by Clark Wilson LLP.

Todd Bell Case Law Update: This took place via Zoom and was extremely well attended. There was no charge for this presentation and CPD credits were allocated. It took place on May 11, 2023, and we intend to have this again next year. All disciplines appear to really benefit from this presentation.

**Co-chairs:** Abby Petterson and Chantal Cattermole **Members:** Yuval Berger and Stephanie Fabbro

### **COACHES COMMITTEE - report provided by Abby Petterson and Yuval Berger**

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Recruiting new coaches and child specialists to join our practice groups remains our committee's top priority. Out of the twenty-five coaches that attended the last basic training ( a record number of MHP in our basic training), three have joint practice groups in their geographical area. Even though the number of coaches who join practice groups is still lower than expected, it appears that there is still a high level of interest among MHPs in this process.

Supporting and mentoring the new coaches, who committed to the process, has been our top priority. In order to motivate participants to join practice groups the committee is looking for ways to; shorten the wait to complete the requirement to join the practice group, partial membership in the practice group is automatically granted upon completion of training, as well as on-going supervision and mentorship to the new recruit.

Committee members met with the new coaches and assisted them with setting up their practice to include divorce coaching, support clinical consideration and ethical concerns, facilitated getting their first experience in this process.

Coaches on the committee also participated in amendments to the divorce coaches' participation agreement and the parenting plan. As part of the process of explaining the changes in the documents to the coaches, the committee also engages with coaches, mostly one on one to answer their questions and concerns.

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

## **NEW PROVINCIAL COURT RULES COMMITTEE – report provided by Justine Mercer**

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GOAL 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.

REPORT: No activity since webinar given to JAC staff in September 2022. Plan to reach out again to contacts at the Provincial Court Justice Access Centres (Stephanie Smith Turpin and others) about further webinar trainings of JAC staff on Collaborative Process in 2023/2024.

**Chair:** Justine Mercer, **Members:** Yuval Berger, Jon Lazar, Tanya Chamberlain

## **WEBSITE COMMITTEE**

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*No committee report*

## **FINANCIAL SUMCOMMITTEE REPORT – report provided by Patti Daum**

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The purpose of our committee is to:

1. Within the context of the challenges noted below, establish whether Protocols or Guidelines for financial neutrals would be beneficial
2. Consider whether there is any “leeway” in our interpretation of IACP Standard 3.6 Financial Specialists
3. Embark on bridging the gap between knowing what financial neutrals do for clients in the collaborative divorce process, and facilitating more consistent utilization of these professionals on files.
4. Creating a culture of trust and communication between financial neutrals and lawyers

Challenges / what are we concerned about?

1. Ensuring all practitioners are adhering to the IACP Standards, which in turn, protects the integrity of the Collaborative process.
2. Many lawyers have experienced inconsistent quality of services from financial neutrals. Some have and continue to provide legal advice.
3. Some financial neutrals are clearly feeling disheartened knowing that lawyers do not (consistently) trust them. Some have said “lawyers are afraid we are going to blow up the process” and “lawyers have said they don’t want us to take their work away from them.” Questions like “how do we build trust?” and “what can we give you to prove we are going to do a good job?” were asked.
4. Do we need to look separately at “aligned” versus “not aligned” financial neutrals in the collaborative process?

Where are we at?

1. At our most recent meeting, key financial neutrals were receptive to receiving training on what constitutes legal opinion. It was recognized by the financial neutrals that if this learning is undertaken, this could help build trust.

2. There was considerable discussion around the “satellite financial neutral”. This is a concept that needs to be discussed at the board level. Some financial neutrals are already approaching their files that way. We need to decide if this is a practice that will effectively be endorsed by the Roster through a practice directive.
3. Communication at the beginning of the collaborative process about the financial neutral’s role is critical.

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

