

STANDARDS FOR ACCREDITATION FOR FINAL APPROVAL BY OCLF BOARD

Obtaining the accreditation designation is voluntary. Those Collaborative Professionals who do not apply for accreditation are not prohibited from engaging in collaborative practice provided that the General and Basic Requirements and your Practice Groups requirements are met for Lawyers, Family Professionals, and Financial Professionals.

For a Collaborative Professional to obtain the accreditation designation, the General Requirements, Basic Requirements, and the requirements for Lawyers, Family Professionals, and Financial Professionals set out below are mandatory.

1. General Requirements

- 1.1. The Collaborative Practitioner is a member in good standing of and an active participant in a collaborative practice group which is a member of the OCLF, and which meets in person, via telephone or web-based face-to-face meetings.
- 1.2. The Collaborative Practitioner has liability insurance of a minimum amount of \$1,000,000 either through their professional organization or third party coverage.

2. Requirements for Lawyers:

- 2.1. Membership in good standing with the Law Society of Upper Canada, with no practice restrictions related to the practice of family law.
- 2.2. A minimum of 35 hours of basic collaborative training including training in client centered facilitative conflict resolution.
- 2.3. A minimum of 12 hours of interdisciplinary training. Where Interdisciplinary training is part of the 35 hours of basic collaborative training in paragraph 2.2 above, then the hours attributed to interdisciplinary training during the basic collaborative training will be counted towards the required 12 hours of interdisciplinary training.
- 2.4. If the applicant has not taken interdisciplinary training as part of basic collaborative training, or has not taken additional interdisciplinary training totaling 12 hours, then the applicant's practical experience working in a collaborative team setting will be substituted for the required 12 hours of interdisciplinary training provided that the following requirements are met:

- (i) The practical interdisciplinary work must involve an additional collaborative professional other than a lawyer in a collaborative team setting; and,
 - (ii) Of the completed eight (8) collaborative files required in paragraph 2.7 below, five (5) of the completed eight (8) collaborative files must involve an additional collaborative professional other than a lawyer.
- 2.5 If the applicant has not taken interdisciplinary training as part of basic collaborative training, nor obtained practical experience working in a collaborative team setting in accordance with the requirements set out in paragraph 2.4 (i), (ii) above, nor taken and completed any interdisciplinary training totaling 12 hours, then the applicant shall be required to take and complete a minimum of 12 hours of interdisciplinary training.
- 2.6 A minimum of 40 hours of training or education in addition to the 35 hours of basic collaborative training required in paragraph 2.2 above. The 40 hours must include:
- 6 hours of advocacy in collaborative practice
 - Domestic Violence (DV) and Family Relations training. ***The DV and Family Relations training policy/protocols, requirements, and number of required hours for lawyers is under discussion, and to be determined by April 2017.**
 - The remaining hours may be comprised of any of the following:
 - Advanced Collaborative Training
 - Advanced Mediation Training
 - Advanced Interest Based Negotiations Training
 - Advanced Communication Skills
- 2.7 Must have completed eight (8) collaborative files with signed Participation Agreements. These collaborative files must have been completed within five (5) years of the application for accreditation. Completed means a final signed Agreement which fully or partially resolves the issues.

3. Requirements for Family Professionals:

- 3.1 Must hold a Master's degree, and, be a member in good standing of one of the following:
- CCC (Canadian counseling and Psychotherapy Association)

- CPO (College of Psychologists of Ontario)
- OACCP (Ontario Association of Consultants, Counsellors, Psychometrists, and Psychotherapists)
- OAMFT (Ontario Association of Marriage and Family Therapist)
- OCSW (Ontario College of Social Workers)
- Psychiatrist

3.2 Must have a background, education and experience in:

- Family systems theory
- Individual and family life cycle and development
- Assessment of individual and family strengths
- Assessment and challenges of family dynamics in separation and divorce
- Challenges of restructuring families after separation
- Expertise in child development, clinical experience with a specialty focus on children and an in-depth understanding of children's unique issues in divorce

3.3 A minimum of 35 hours of basic collaborative including training in client centered, facilitative conflict resolution.

3.4 A minimum of 12 hours of interdisciplinary training. Where Interdisciplinary training is part of the 35 hours of basic collaborative training, then the hours attributed to interdisciplinary training during the basic collaborative training will be counted towards the required 12 hours of interdisciplinary training.

3.5 If the applicant has not taken interdisciplinary training as part of basic collaborative training, or has not taken additional interdisciplinary training totaling 12 hours, then the applicant's practical experience working in a collaborative team setting will be substituted for the required 12 hours of interdisciplinary training provided that the following requirements are met:

- (i) Of the completed eight (8) collaborative files required in paragraph 3.8 below, five (5) of the completed eight (8) collaborative files must involve an additional collaborative professional in a collaborative team setting.

3.6 If the applicant has not taken interdisciplinary training as part of basic collaborative training, nor obtained practical experience working in a collaborative team setting in accordance with the requirements set out in paragraph 3.4 and 3.5 above, nor taken and completed any interdisciplinary training totaling 12 hours, then the applicant shall be required to take and complete a minimum of 12 hours of interdisciplinary training.

- 3.7 A minimum of 40 hours of training or education in addition to the 35 hours of basic collaborative training required in paragraph 3.3 above. The 40 hours must include:
- A minimum of 12 hours of family law training or education for Family Professionals acting as a neutral, and not a coach, to obtain a basic understanding of the law in Ontario as it pertains to separating families with a focus on family relations, including the care of children.
 - Domestic Violence (DV) and Family Relations training. **The DV and Family Relations training policy/protocols, requirements, and numbered of required hours for Family Professionals is under discussion, and to be determined by April 2017.**
 - The balance of the 40 hours may comprise of any of the following:
 - Advanced Collaborative Training
 - Advanced Mediation Training
 - Advanced Interest Based Negotiations Training
 - Advanced Communication Skills
- 3.8 Must have completed eight (8) collaborative files with signed participation agreements. These collaborative files must have been completed within five (5) years of the application for accreditation. Completed means a final signed Agreement which fully or partially resolves the issues.

4. Requirements for Financial Practitioners:

- 4.1 Professional license or designation in good standing in one of the following:
- CPA – Certified Public Accountant
 - CA – Chartered Accountant
 - CGA – Certified General Accountant
 - CMA – Certified Management Accountant
 - CFP – Certified Financial Planner
 - Ch.F.C. - Chartered Financial Consultant
 - CLU - Chartered Life Underwriter
 - PFP - Personal Financial Planner
 - CFDS – Chartered Financial Divorce Specialist
 - CDFA - Certified Divorce Financial Analyst
 - FCIA - Fellow of the Canadian Institute of Actuaries
 - CBV - Chartered Business Valuator

- 4.2 Background, education and experience in:
- Financial aspects of divorce
 - Cash management and spending plans
 - Retirement and pension plans
 - Income tax
 - Risk management
 - Individual and family financial planning concepts
 - The emotional impact of separation and divorce on children and families
- 4.3 A minimum of 35 hours of basic collaborative training, including training in client centered, facilitative conflict resolution.
- 4.4 A minimum of 12 hours of interdisciplinary training. Where Interdisciplinary training is part of the 35 hours of basic collaborative training, then the hours, attributed to interdisciplinary training during the basic collaborative training will be counted towards the required 12 hours of interdisciplinary training.
- 4.5 If the applicant has not taken interdisciplinary training as part of basic collaborative training, or has not taken additional interdisciplinary training totaling 12 hours, then the applicant's practical experience working in a collaborative team setting will be substituted for the required 12 hours of interdisciplinary training provided that the following requirements are met:
- (i) Of the completed eight (8) collaborative files required in paragraph 4.9 below, five (5) of the completed eight (8) collaborative files must involve an additional collaborative professional in a collaborative team setting.
- 4.6 If the applicant has not taken interdisciplinary training as part of basic collaborative training, nor obtained practical experience working in a collaborative team setting in accordance with the requirements set out in paragraph 4.5 above, nor taken and completed any interdisciplinary training totaling 12 hours, then you shall be required to take and complete a minimum of 12 hours of interdisciplinary training.
- 4.7 At least 35 hours of education in the financial aspects of divorce, giving the financial professionals a basic understanding of family law in Ontario. Such education must include the following:
- Family Law legislation in Ontario
 - Divorce procedures and process options

- Property – valuation and division
- Pensions and RRSPs – valuation and division
- Cash flow management, including budgeting
- Child and spousal support
- Financial implications of different scenarios for settlement, including analysis and future projections of net worth and cash flow

4.8 A minimum of 40 hours of training or education in addition to the 35 hours of basic collaborative training required in paragraph 4.3 above. The 40 hours must include:

- **Domestic Violence (DV) and Family Relations training. The DV and Family Relations training policy/protocols, requirements, and numbered of required hours for Financial Professionals is under discussion, and to be determined by April 2017.**
- The balance of the 40 hours may comprise of any of the following:
 - Advanced Collaborative Training
 - Advanced Mediation Training
 - Advanced Interest Based Negotiations Training
 - Advanced Communication Skills

4.9 Must have completed eight (8) collaborative files with participation agreements signed by the parties. These collaborative files must have been completed within five (5) years of the application for accreditation. Completed means a final signed Agreement which fully or partially resolves the issues.

5. Code of Conduct

5.1 The Collaborative Practitioner will adhere and comply with the Code of Conduct of their Professional Governing Body and will adopt and follow the IACP Professional Standards, as established from time to time.

6. Supporting References

6.1 All applications for accreditation must be accompanied by three (3) reference letters attesting to the applicant's fitness as a collaborative practitioner. The reference letters must be from collaborative colleagues and one (1) out of the three (3) letters must be from within the applicant's

profession. Letters must be received directly from the referee or if submitted with the application, must be received in an envelope sealed by the referee.

Where appropriate specific dispensation may be obtained if the applicant's Practice Group has one (1) or fewer Financial Professionals or Family Professionals.

7. Additional Discretionary Requirements

- 7.1 The Accreditation Committee may request an interview with the applicant as part of the admission process.
- 7.2 In the course of considering an application, the Accreditation Committee may:
 - Receive or request further information or submissions from an applicant;
 - Decide when extensive experience and established credibility or other such evidence can substitute for some of the training, education requirements listed in this document or prerequisite number of cases;
 - Request additional evidence demonstrating that licensing, educational and training requirements have been met.
- 7.3 The Accreditation Committee reserves the right to refuse accreditation to an applicant despite the fact that the applicant meets the technical requirements for admission. In such situations, the Committee will offer the applicant an interview to discuss the application and the Committee's concerns.
- 7.4 In the event that an applicant has not been involved in the minimum number of cases in the proceeding five (5) years, he or she may send a written explanation to the Committee explaining the circumstances. The Committee will review the written submission and may vary the minimum number of cases required for accreditation in certain circumstances.

8. On Going Accreditation Requirements – Renewal Process Every Two (2) Years

- 8.1 All professionals, after accreditation, must engage in a minimum of twenty-four (24) hours, during the previous two (2) year period, of on-going professional development or continuing education related to the Collaborative Practitioner's collaborative practice. Of the 24 hours, seven (7) must be directly related to collaborative skills and additional hours to Domestic Violence (DV), and Family Relations training. **The DV and**

Family Relations training policy/protocols, requirements, and numbered of required hours for all professionals is under discussion, and to be determined by April 2017.

- The remaining hours may include:
 - Mediation trainings
 - Communication skills training
 - Family systems or family development trainings
 - Attendance at the O.C.L.F Conference
 - Attendance at practice group educational activities
 - Any program from the International Academy of Collaborative Professions, including the attendance at the annual forum or the Collaborative Institute
 - Participation in a recognized collaborative practice mentoring program (limited to eight (8) hours over the two (2) year period).

8.2 If a professional provides training in his/her area of collaborative practice, the training hours will count as double the hours of continuing professional development for that professional (for example, a four (4) hour training will be equivalent to eight (8) hours of professional development for the trainer).

8.3 After Accreditation, the Collaborative Practitioner must maintain an active collaborative practice. Each practitioner must be involved in the following number of collaborative files over the two (2) year period:

- Lawyers: six (6) new collaborative files (participation agreements signed) or at least 30 hours of involvement in an on-going collaborative file(s)
- Family Professionals: four (4) new collaborative files (participation agreements signed) or at least 20 hours of involvement in an on-going collaborative file(s)
- Financial Professionals: two (2) new collaborative files (participation agreement signed) or at least 15 hours of involvement in an on-going collaborative file(s)

8.4 In the event that an accredited professional is not able to comply with the requirements set out in paragraphs 8.1 and 8.3 above, he or she must send a written report to the Accreditation Committee explaining the circumstances surrounding non-compliance. The Committee will review the written submission and may recommend to the OCLF Board that the requirements of paragraphs 8.1 and 8.3 be waived for that specific individual.

- 8.5 After accreditation, the Collaborative Practitioner must continue to maintain membership in a practice group which is a member of the OCLF.
- 8.6 After accreditation, the Collaborative Practitioner must maintain liability insurance of at least \$1,000,000 through their professional organization or third party insurer.

9. Additional Issues

- 9.1 A complaint made about a Collaborative Practitioner to the Practice and Ethics Committee may result in termination or non-renewal of accreditation.