

Elder / Adult Family Mediation Training

Timed Agenda

July 29 – August 1, 2014

and

October 27 – 30, 2014

Time	Topic	Objectives	Training Methodology	Presenter	Qualifying Time
9:00 AM – 5:00 PM	DAY 1				6 hours, 55 minutes (plus 65 min for lunch & breaks)
8:30 – 9:00	Registration				0 hours
9:00 – 10:30	<ul style="list-style-type: none"> • Introductions and Setting Goals for the Training • What is this Field of Practice? • Reaffirming the Principles of Mediation • Spectrum of Mediation Styles • Presenting Issues • Characteristics of Elder / Adult Family Mediation 	Participants will: <ul style="list-style-type: none"> • Share their own goals for the training • Review the Principles of Mediation and revisit in relation to Elder / Adult Family Mediation • Consider the Spectrum of Styles and learn how facilitative mediation can be especially helpful in this type of work • Learn the Presenting Issues and Characteristics of Elder / Adult Family Mediation 	Welcome and Interactive Lecture & Discussion (For example, to elicit the characteristics of Elder Mediation, trainers will share a case study and flip chart characteristic identified by the class, then add to this list.)	Lead Trainer	1 hour, 30 minutes

10:30 – 10:40	Break				0 minutes
10:40 – 12:30	<p><i>Aging and Resources</i></p> <ul style="list-style-type: none"> • Mental & Physical Effects of Aging • Maintaining Independence • Coping with Loss • Caregiving and Aging Families • Long Term Care Options for Elders 	<p>Participants will:</p> <ul style="list-style-type: none"> • Learn about myths vs. realities of aging, including physical, mental and psychosocial effects of aging • Learn about cognitive changes and types of dementia • Receive information on care options for elders at home and in community settings • Consider, compare and contrast the role of a Geriatric Care Manager vs. the role of a Mediator 	<p>Lecture with Supportive PowerPoint Presentation</p> <p>A guest expert will provide an overview of aging and will share information about resources available to help elders maintain independence and autonomy, as well as information about the continuum of care options available as elders need more assistance.</p>	<p><i>Guest Expert</i> (Geriatric Care Manager, Social Worker or Nurse)</p>	1 hour, 50 minutes
12:30 – 1:15	Lunch				0 hours
1:15 – 2:25	<ul style="list-style-type: none"> • Exploring and Maximizing All Parties' Capacity to Participate in Mediation • Elder Mediation: A Hybrid of Dispute Resolution Processes* <p><i>(*As Frank Sander said, "Let the forum fit the fuss." Elder mediation draws from other dispute resolution processes including Dispute Systems Design, Consensus Building, Facilitation, and others.)</i></p>	<p>Participants will:</p> <ul style="list-style-type: none"> • Consider issues of capacity • Learn ways of maximizing participants' capacity to participate in the process • Learn about some of the variety of Dispute Resolution processes that shape Elder Mediation 	<p>Lecture with Supportive PowerPoint Presentation</p> <p>Trainers will introduce participants to broad topics that will be themes throughout the training, including maximizing capacity to participate in mediation, and contributions of related dispute resolution processes on this practice of mediation.</p>	Lead Trainer	1 hour, 10 minutes

2:25 – 2:35	Break			0 minutes	
2:35 – 3:05	<ul style="list-style-type: none"> The Six Phase Process Model* Pre-Mediation Private Sessions <p>(*Elder Decisions® Six Phase Process Model includes:</p> <ol style="list-style-type: none"> Intake/Convening Private Sessions - one or more rounds Meeting Preparation Family Meeting(s) Meeting Follow-up Feedback and Check-ins) 	<p>Participants will:</p> <ul style="list-style-type: none"> Be introduced to the Elder Decisions® Six Phase Process Model for Elder Mediation Review and discuss a “Checklist for Private Sessions Prior to Family Meeting” 	<p>Lecture with Supportive PowerPoint Presentation</p> <p>Trainers will introduce participants to a six-phase model that will serve as the foundation for the rest of the training, and will begin to discuss the early stages of the process in more depth.</p>	Lead Trainer	30 minutes
3:05 – 4:05	Pre-Mediation Private Session (Role Play Exercise in Pairs)	<p>Participants will:</p> <ul style="list-style-type: none"> Learn about a structure for giving feedback that can help create a safe learning environment Practice developing trust with a party, identifying interests, and identifying topics in a pre-mediation private session exercise Gain insight into the experience of a party (specifically an elder or an adult child) in the early stages of the mediation process 	<p>Small Group Exercise, Skill Building & Debrief</p> <p>Trainers will discuss feedback methods, and divide the class into pairs. Trainees will work in pairs to experience the role of both a party and a mediator in a pre-mediation private session (alternating roles part way through the process).</p>	Lead Trainer	60 minutes

4:05 – 4:15	Large Group Debrief of Pre-Mediation Private Session Exercise	Participants will: <ul style="list-style-type: none"> • Have the opportunity to discuss overall “takeaways” from the exercise 	Large Group Debrief: Discussion of Exercise “Takeaways”	Lead Trainer	10 minutes
4:15 – 4:45	<ul style="list-style-type: none"> • Developing a Topics List (and Agenda, if Necessary) for the First Joint Session (Family Meeting) 	Participants will: <ul style="list-style-type: none"> • Learn a process and begin to build the skills for developing a topics list and agenda • Gain sensitivity to “hot button” language • Learn how to reframe issues to create a topics list that is acceptable to all parties 	Large Group Exercise Trainees will collaborate as a large group, facilitated by the trainers, to develop a topics list from information gathered during the earlier Private Session Exercise.	Lead Trainers	30 minutes
4:45 – 5:00	Day One Wrap Up and BIN (the “BIN” is also known as the “parking lot” for questions from the class to be addressed at a later time)	Participants will: Have the opportunity to raise questions and gather more information on areas that were covered earlier in the day	Q&A regarding questions that were raised earlier in the day and recorded in the “BIN.” (Questions are welcome throughout the training, and when time does not permit answering them, or when they relate better to other sections, the trainers will record them on the “BIN” so that they are not lost, and can be revisited later.) Trainees will receive assignments of “homework” in preparation for Day 2 exercise and role play.	Lead Trainers	15 minutes

Time	Topic	Objectives	Training Methodology	Presenter	Qualifying Time
9:00 AM – 5:00 PM	DAY 2				6 hours, 45 minutes (plus 75 min for lunch & breaks)
9:00 – 10:30	<i>Elder Law / Legal Planning</i> <ul style="list-style-type: none"> • Planning for Financial Management • Medical Decision Making • Guardianship and Alternatives • Long-Term Care Costs, and Options for Paying for Care • Asset Protection Planning 	Participants will: <ul style="list-style-type: none"> • Learn about the basics of Elder Law, in part so that they can better identify and “flag” areas about which parties may need more information, and thereby support informed decision-making • Understand that additional training in New York court-specific rules and procedures and relevant New York law may be necessary 	Lecture with Supportive PowerPoint Presentation A guest expert will provide a detailed overview of Elder Law, and highlight specific details as they relate to issues that may arise in Elder Mediation. The speaker will identify federal, general, and state-specific information, and may pose “issue spotting questions” to encourage participants to consider the implications of information discussed.	<i>Guest Expert</i> (Elder Law Attorney)	1 hour, 30 minutes
10:30 – 10:45	Break				0 minutes

10:45 – 11:15	<ul style="list-style-type: none"> • The First Family Meeting • Working with Your Co-Mediator • Who Might Be at the Table? • Roles of Non-Parties: Advocates, Surrogates and Advisors • Working with Large, Dispersed Families with Multiple Issues 	<p>Participants will:</p> <ul style="list-style-type: none"> • Learn a model for setting the stage for a productive family meeting • Learn the value of transparency and collaboration with a co-mediator • Consider potential stakeholders in the dispute/decision-making process • Consider the role that advocates, surrogates and advisors may have in the mediation: who might be asked to attend, whom they would represent, how they might affect the conversation, and how they might be prepared in advance of the meeting • Learn strategies and resources for working with large and/or geographically dispersed families 	Lecture & Discussion Supported by PowerPoint	Lead Trainer	30 minutes
11:15 – 12:30	Trainer Demonstration Role Play (Fishbowl)	<p>Participants will:</p> <ul style="list-style-type: none"> • Observe experienced co-mediators set the stage at the beginning of a family mediation • Identify “take-away” learnings, such as techniques useful in multi-party, multi-issue mediations 	<p>Skill Demonstration & Debrief</p> <p>Trainers will co-mediate a fishbowl role play of an adult family dispute with four trainees as parties and the rest of the class as observers, then debrief with the class.</p>	Lead Trainers	1 hour, 15 minutes
12:30 – 1:15	Lunch				0 hours

1:15 – 2:10	<ul style="list-style-type: none"> Co-Mediator Preparation - Small Group Workshops with Coaches 	<p>Participants will:</p> <ul style="list-style-type: none"> Learn strategies to effectively prepare for the family meeting Practice developing a topics list Practice developing rapport with a co-mediator 	<p>Small Group Exercise & Discussion</p> <p>Participants will be grouped according to the role play they will be mediating. Trainers will coach each group to begin developing a topics list and preparing for the role play.</p>	Lead Trainers (and Possibly Guest Coach Depending on Size of Training)	55 minutes
2:10 – 2:30	<ul style="list-style-type: none"> Possible Losses in Aging 	<p>Participants will:</p> <ul style="list-style-type: none"> Gain sensitivity to issues of loss in the experiences of their aging clients 	<p>Small Group Exercise & Discussion</p> <p>Trainees will participate in an individual reflective exercise designed to give them insight into the effect of loss on people's lives.</p>	Lead Trainer	20 minutes
2:30 – 2:45	Break				0 minutes
2:45 – 4:15	Role Play #1 with Small Group Debrief	<p>Participants will:</p> <ul style="list-style-type: none"> Gain mediation experience as a mediator, an observer, or as a participant As mediators, practice working with a co-mediator and facilitating multi-party conversations As participants, feel the impact of the presence of the mediators, and of their actions, interventions, and body language As observers, begin to note the "big picture takeaways" and learning points of the role play 	<p>Role Play with Small Group Debrief</p> <p>Trainees will be assigned to role play groups, each led by a Lead Trainer or Coach. In each group, some trainees will play parties in a mediation session, two or more trainees will work in co-mediator pairs and co-mediate during the role play, and some trainees may observe. The role play</p>	Lead Trainers/ Role Play Coaches (Depending on the size of the training, an additional experienced Role Play Coach may participate, so that each role play group will have an	1 hour, 30 minutes

			will be followed by a small group debrief. (By the end of the training, each trainee will have served as a mediator for at least one role play, and as a disputant for at least one role play.)	experienced Trainer/Coach throughout the role play.)	
4:15 – 4:25	Large Group Debrief of Role Play #1	Participants will: <ul style="list-style-type: none"> • Have the opportunity to discuss overall “takeaways” from all role play groups 	Large Group Debrief: Discussion of Role Play “Takeaways”	Lead Trainer	10 minutes
4:25 – 4:45	<ul style="list-style-type: none"> • Age Bias 	Participants will: <ul style="list-style-type: none"> • Learn to check assumptions and be alert for age biases – in themselves, their co-mediators, and their clients (including the elders and all other parties) 	Small Group Exercise & Discussion A small group exercise and large group discussion will highlight issues of age bias.	Lead Trainer	20 minutes
4:45 – 5:00	Day Two Wrap Up and BIN (the “BIN” is also known as the “parking lot” for questions from the class to be addressed at a later time)	Participants will: <ul style="list-style-type: none"> • Have the opportunity to raise questions and gather more information on areas that were covered earlier in the training 	Q&A regarding questions that were raised earlier in the training and recorded in the “BIN.” Trainees will receive assignments of “homework” in preparation for Day 3 role plays.	Lead Trainers	15 minutes

Time	Topic	Objectives	Training Methodology	Presenter	Qualifying Time
9:00 AM – 5:00 PM	DAY 3				6 hours, 55 minutes (plus 65 min for lunch & breaks)
9:00 – 9:15	Review and Q&A (as needed)	Participants will: <ul style="list-style-type: none"> Have the opportunity to raise questions 	Q&A as Needed (May start Role Play #2 early)	Lead Trainer	15 minutes
9:15 – 10:50	Role Play #2 with Small Group Debrief	Participants will: <ul style="list-style-type: none"> Gain mediation experience as a mediator, an observer, or as a participant As mediators, practice working with a co-mediator and facilitating multi-party conversations As participants, feel the impact of the presence of the mediators, and of their actions, interventions, and body language As observers, begin to note the “big picture takeaways” and learning points of the role play 	Role Play with Small Group Debrief Trainees will be assigned to role play groups, each led by a Lead Trainer or Coach. In each group, some trainees will play parties in a mediation session, two or more trainees will work in co-mediator pairs and co-mediate during the role play, and some trainees may observe. The role play will be followed by a small group debrief. (By the end of the training, each trainee will have served as a mediator for at least one role play, and as a disputant for at least one role play.)	Lead Trainers/ Role Play Coaches (Depending on the size of the training, an additional experienced Role Play Coach may participate, so that each role play group will have an experienced Trainer/Coach throughout the role play.)	1 hour, 35 minutes

10:50 – 11:00	Break				0 minutes
11:00 – 11:15	Large Group Debrief of Role Play #2	Participants will: <ul style="list-style-type: none"> • Have the opportunity to discuss overall “takeaways” from all role play groups 	Large Group Debrief: Discussion of Role Play “Takeaways”	Lead Trainer	15 minutes
11:15 – 12:30	<i>Mediation Marketing</i> <ul style="list-style-type: none"> • Target marketing (clarifying service, message and audience for Elder Mediation services) • Marketing action plans 	Participants will: <ul style="list-style-type: none"> • Learn about Marketing strategy • Consider steps for clarifying marketing message and audience, specifically tailored to Elder Mediation • Review sample approaches • Review an example of a structured action plan 	Lecture with Supportive PowerPoint Presentation A guest expert will provide an overview of marketing strategy and methods for “getting the word out” about Elder Mediation.	<i>Guest Expert</i> (Experienced Mediator and Marketer)	1 hour, 15 minutes
12:30 – 1:15	Lunch				0 hours
1:15 – 1:50	<ul style="list-style-type: none"> • Screening for Appropriateness, Abuse, Neglect, and Safety • Issues Regarding Participation of (or for) the Senior • Determining Prior Wishes 	Participants will: <ul style="list-style-type: none"> • Gain awareness about the prevalence of elder abuse and safety issues, and learn about screening tools • Consider when and how an elder may be included in the mediation process when issues of capacity or standards of “do no harm” are a concern • Consider how family members might determine the wishes of a person who is no longer able to speak for him or herself 	Lecture & Discussion Supported by PowerPoint	Lead Trainer	35 minutes

1:50 – 2:25	<ul style="list-style-type: none"> Professional Advice – Resources Obstacles to Bringing Parties to the Table Crafting Agreements Defining Success 	<p>Participants will:</p> <ul style="list-style-type: none"> Learn about resources available to elders / adult families, and how they can be helpful to the mediation process Think about how the type of case and status of the parties (pro se or represented) may affect the mediation process Explore some of the challenges to bringing parties to the mediation table Hear about the variety of types of agreements that can result from mediation Consider the notion of success in mediation, and what it means 	<p>Lecture & Discussion Supported by PowerPoint</p> <p>Trainers will use stories to convey “takeaways” about the use of other professionals as resources – within and/or outside of the mediation process; obstacles and tips for bringing parties to the table; the variety of types of agreements families have reached in mediation; and differing views on what makes a “successful” outcome – noting that success may or may not include a full agreement on all issues.</p>	Lead Trainer	35 minutes
2:25 – 2:35	Break				0 minutes
2:35 – 4:35	Role Play #3 with Small Group Debrief	<p>Participants will:</p> <ul style="list-style-type: none"> Gain mediation experience as a mediator, an observer, or as a participant As mediators, practice working with a co-mediator and facilitating multi-party conversations As participants, feel the impact of the presence of the mediators, and of their actions, interventions, and body language As observers, begin to note the “big picture takeaways” and learning points of the role play 	<p>Role Play with Small Group Debrief</p> <p>Trainees will be assigned to role play groups, each led by a Lead Trainer or Coach. In each group, some trainees will play parties in a mediation session, two or more trainees will work in co-mediator pairs and co-mediate during the role play, and some trainees may observe. The role play will be followed by a small</p>	<p>Lead Trainers/ Role Play Coaches</p> <p>(Depending on the size of the training, an additional experienced Role Play Coach may participate, so that each role play group will have an experienced</p>	2 hours

			group debrief. (By the end of the training, each trainee will have served as a mediator for at least one role play, and as a disputant for at least one role play.)	Trainer/Coach throughout the role play.)	
4:35 – 4:50	Large Group Debrief of Role Play #3	Participants will: <ul style="list-style-type: none"> • Have the opportunity to discuss overall “takeaways” from all role play groups 	Large Group Debrief: Discussion of Role Play “Takeaways”	Lead Trainer	15 minutes
4:50 – 5:00	<ul style="list-style-type: none"> • Day Three Wrap Up and BIN (the “BIN” is also known as the “parking lot” for questions from the class to be addressed at a later time) 	Participants will: <ul style="list-style-type: none"> • Have the opportunity to raise questions and gather more information on areas that were covered earlier in the day 	Q&A regarding questions that were raised earlier in the training and recorded in the “BIN.” (Questions are welcome throughout the training, and when time does not permit answering them, or when they relate better to other sections, the trainers will record them on the “BIN” so that they are not lost, and can be revisited later.) Trainees will receive assignments of “homework” in preparation for the final role play.	Lead Trainers	10 minutes

Time	Topic	Objectives	Training Methodology	Presenter	Qualifying Time
9:00 AM – 3:00 PM	DAY 4				4 hours, 45 minutes (plus 75 min for lunch & breaks)
9:00 – 11:45	Role Play #4 with Small Group Debrief	Participants will: <ul style="list-style-type: none"> Gain mediation experience as a mediator, an observer, or as a participant As mediators, practice working with a co-mediator and facilitating multi-party conversations As participants, feel the impact of the presence of the mediators, and of their actions, interventions, and body language As observers, begin to note the “big picture takeaways” and learning points of the role play 	Role Play with Small Group Debrief Trainees will be assigned to role play groups, each led by a Lead Trainer or Coach. In each group, some trainees will play parties in a mediation session, two or more trainees will work in co-mediator pairs and co-mediate during the role play, and some trainees may observe. The role play will be followed by a small group debrief. (By the end of the training, each trainee will have served as a mediator for at least one role play, and as a disputant for at least one role play.)	Lead Trainers/ Role Play Coaches (Depending on the size of the training, an additional experienced Role Play Coach may participate, so that each role play group will have an experienced Trainer/Coach throughout the role play.)	2 hours, 30 minutes (plus embedded 15 minute break)
11:45 – 12:00	Large Group Debrief of Role Play #4	Participants will: <ul style="list-style-type: none"> Have the opportunity to discuss overall “takeaways” from all role play groups 	Large Group Debrief: Discussion of Role Play “Takeaways”	Lead Trainer	15 minutes

12:00 – 1:00	Lunch			0 hours
1:00 – 2:00	<ul style="list-style-type: none"> Ethical Challenges 	<p>Participants will:</p> <ul style="list-style-type: none"> Learn to be mindful of the ethical challenges that may await them in this work Consider questions of ethics in relation to the principles of mediation and the Model Standards of Conduct for Mediators 	<p>Discussion & Interactive Lecture</p> <p>The Lead Trainers will pose questions to the class regarding potential ethics issues related to the Principles of Mediation, using mediation case scenarios as examples. They will reference the “Model Standards of Conduct for Mediators” adopted by the AAA, the ABA and ACR, as well as other codes of conduct.</p>	<p>Lead Trainers</p> <p>1 hour</p>
2:00 – 2:30	<ul style="list-style-type: none"> Continuing Education Suggested Readings and Internet Resources Getting the Word Out 	<p>Participants will:</p> <ul style="list-style-type: none"> Become aware of the many opportunities for continued learning in the field of elder mediation, and the need for continuing education Become aware of the many written resources available in the field of the elder mediation Consider ways in which they can “spread the word” and raise awareness about elder and adult family mediation to attorneys, to the Courts, to eldercare professionals and to the general public 	<p>Lecture & Discussion Supported by PowerPoint</p> <p>Trainers will share information about both the need and opportunity for continuing education in the field.</p> <p>Trainers will also share what methods have been effective in “spreading the word” about Elder / Adult Family Mediation.</p>	<p>Lead Trainer</p> <p>30 minutes</p>

2:30 – 3:00	<ul style="list-style-type: none"> • BIN, Review Goals, Wrap-up 	<p>Participants will:</p> <ul style="list-style-type: none"> • Have an opportunity to ask questions that have not been addressed and to have further discussion about topics of their choosing • Reflect on the goals of this training and provide feedback verbally and on an evaluation questionnaire 	<p>Lecture, Q&A, and Discussion</p> <p>Trainers will address any remaining questions on the “BIN,” review and address Goals for the training from Day One, and engage in a discussion with trainees about additional questions. They will invite feedback from trainees, both verbally and through an evaluation form.</p>	Lead Trainers	30 minutes
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Total Contact Hours: 25 hours, 20 minutes
Total Contact Hours Applying For: 16 hours

Ethics Content

Discussions of ethics are woven throughout the training, in topics such as Capacity Issues and Maximizing Capacity to Participate, Screening for Abuse and Neglect, Mediation Principles, Who Needs to Be at the Table, etc., and in role play debriefs. In addition, time on Day 4 is devoted specifically to Ethical Challenges to raise issues that may not have come up earlier in the training, and to revisit and further explore issues already raised.

Throughout the training, a minimum of 2 hours is devoted to ethics.