

## **CLIENTS' WORKSHEET FOR DEVELOPMENT OF SHARED VALUES**

*Creating a vision for the future:* In this process it is helpful to begin with the end in mind so that you both have an idea of where you want to be at the end of this process and into the future.

It is important to take the time to develop a Mission Statement of overarching/organizing values and principles. These are broad affirmations about your vision for yourselves and your children going forward. This statement will be the cornerstone of both your financial and parenting plans. It will guide you in your specific decisions and act as a standard to evaluate your ultimate agreement.

This process will allow you to see the principles or Macro/high end goals that you both have in common and also identify matters of a special significance to one party. You will then develop specific goals to that reach those ends.

There are three types of principles to consider: Those about the process of dissolving the marital relationship, those around the children, and those around the actual substance such as in the financial plan.

Macro principles:

### **Principles Focusing on Children: What is important to you for your children?**

Examples:

- We agree that to the extent that it is possible, we want our children to have a stable environment, with as few disruptions as possible
- We agree that it is important to our children to have a good relationship with each parent.
- We agree that we want our children to have the opportunity for a good education.
- We agree to the importance of our children having close relationships with extended family on both sides.
- We agree that we both want to share our children's major life events and act in ways that are comfortable for our children
- We agree to the importance of (eg: solid religious education) for our children and will both work together to achieve it.

### **Principles Focusing on Adults: What is important for you?**

Examples of general statements about the Process of Dissolving the Marriage:

- We agree to the importance of ending the marriage amicably, with dignity and respect
- We both value the importance of each of us maintaining contact with extended family and mutual friends
- We want to acknowledge each other's contributions to the marriage

Example of general Substance statements about the future:

- We agree that we both deserve to live/retire with dignity.
- We agree that we both need to maximize our earning potentials

Step 2.

**Explore the specifics to achieve the vision you created in your Mission Statement of Principles – what do you need to get there?**

The essentials

What is essential to you?

What do you think is essential to your spouse?

What do you think is essential for your children?

Think about your interests, needs, and concerns about each of these topics and also think about what your spouse's answers might be. Please also add any others that are important to you. Prioritize these goals for yourself.

- Housing – number of bedrooms, location, school district
- Healthcare costs: insurance, special needs
- Retirement and savings
- Automobile expenses
- Transportation costs
- Utilities
- Expenses specific to the children

**What do you each see as nice, if possible, but not essential expenses?** (These will vary from person to person. Some things that others have thought of as discretionary are: vacations, lawn service, gym memberships, entertainment, gifts, etc.)

For yourself?

For your spouse?

For your children?

## **For the coach**

You are preparing the clients for Interest Based Negotiations which focuses on the parties' developing Macro and Micro Goals.

The first step is to help them develop Macro or high level/overarching/organizing goals. We do this with the clients by helping them develop what we call their "Mission Statement of Principles".

These goals are in 3 categories: 1) about the process, 2) concerning the children, and 3) about the substance of the agreement.

Macro goals are very high level general principles. Focusing on developing these principles helps each to think about what is important to his/herself, and to hear what is important to the other. It helps the parties to find common ground, which builds good will; and it helps set the frame for them to think about the future.

Once you have the agreements in principle, the parties will be better prepared to work on specific or micro goals that fit those principles. The principles can be used to guide and focus the process, and later to build specific agreements.

Do not let people skip over this exercise. Do not just read the Statement of Principles in the Roadmap to the parties and assume they agree to it. It is much more effective if the parties think about what is important to each of them and develop their own statement of principles. It becomes their work product. You are helping them to build a rudder and compass for the journey ahead. It is important information to note if people resist the process, or have conflicting principles/goals. This usually means that the process of creating a mutually satisfying agreement will be more difficult.

It is important to take the time to explore the parties' interests, values, priorities, concerns & fears about each of the issues in order to develop an agreement that is specific to the parties and satisfactory to each of them.

The second step is to help the parties develop shared Micro or specific goals that will help them to meet their macro goals.

An example of a macro goal informing a micro goal: "We both agree to the importance of Sally having as much stability at this time in her life as is possible. To that end, we both agree that, if possible we would like:

- to both live in the same school district,
- for Sally to have a two homes with a bedroom in both homes,
- for Sally to be able to maintain her current extracurricular activities
- for both parents to support Sally spending time with both extended families and with her friends".

The clients are to come in to their coach sessions with their individual completed homework sheets regarding developing a Mission Statement of Principles. These will guide your discussions.

Use the Interest Based Negotiation Worksheet to keep track of the parties' shared Macro principles, Micro goals, and each of their interests, needs, concerns and fears. This information is to be shared with and used by the team for developing agreements.

**(the parties) Mission Statement of Principles**

## **INTEREST BASED NEGOTIATION WORKSHEET**

Specific Mutual Goals of the parties

Specific Individual interests of each party

Individual needs, concerns, and fears of each party