



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN MATEO
MULTI OPTION ADR PROJECT
HALL OF JUSTICE AND RECORDS
400 COUNTY CENTER
REDWOOD CITY, CALIFORNIA 94063

Instructions for ADR Program Panelist Application

Thank you for your interest in San Mateo Superior Court's Civil and/or Probate ADR Program. The ADR Program Advisory Committee, which includes representatives of the San Mateo Superior Court, Bar Association and community, reviews panelist applications approximately once a year. Please call for the annual deadline date.

The ADR Program is committed to making available to the public a core group of qualified, dispute resolution professionals who may be privately retained by parties to help in the resolution of their dispute. Although applicants may meet the minimum training and experience requirements outlined in the application, these qualifications represent a floor not a ceiling for panelists. The program must limit the number of qualified panelists who serve on the panel at any one time. Presently, we are looking for individuals who either add to the professional and/or personal diversity of our current panel or who specialize in areas in which there is a demonstrated need for additional panelists.

If you are applying to the court's Probate ADR Program, please add a narrative sheet detailing your probate-related experience. When completing the application, please be as specific as possible, especially with regard to the number of hours of training you have received and the number of mediations and/or arbitrations you have conducted.

In San Mateo Superior Court cases, parties have the choice of either selecting a neutral from our panel or selecting a neutral who is not affiliated with the court's program. The selection of the neutral rests entirely with the parties. Since parties have the option to select whomever they would like to handle their case, the Civil ADR Program acts as a starting point for parties to find qualified neutrals; it does not limit the universe of potential providers.

Feel free to contact us at (650) 261-5075 or (650) 261-5076 should you have any further questions.

Very truly yours,

ADR Staff

**San Mateo Superior Court
ADR Program Panelist Application
for Mediation, Binding Arbitration and
Neutral Evaluation Panels**

Application for: (check one or both)

Civil ADR Program: _____ Probate ADR Program _____

I. GENERAL INFORMATION

Name: _____

Current Occupation: _____

Address: _____

Firm/Office Number: _____

Telephone Number: _____ Length of time employed at firm? _____

Facsimile Number: _____ E-mail address: _____

Best time to call: _____

Confidential and Optional: Home address and telephone number: _____

Relevant Experience

As applicable:

Date admitted to the California Bar: _____ () Active () Inactive Bar Number: _____

Summarize legal experience (including teaching) particularly during the last five years: _____

Number of years engaged in active litigation: _____

Please indicate the percentage of your practice in the last five years spent representing:

Plaintiff _____% Defense _____%

Are you licensed in a profession or occupation other than the practice of law? _____

Occupation: _____ Licensing Agency: _____

State: _____ License Number: _____

Summarize professional experience particularly during the last five years: _____

Place of Employment

Position

Dates

<u>Place of Employment</u>	<u>Position</u>	<u>Dates</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Languages/Bi-Cultural Capabilities

Languages: _____ Bi-cultural capabilities: _____

Degree of Fluency (Comfortable conducting ADR session in foreign language): _____

II. SUBJECT MATTER AND PROCESS EXPERTISE

Please indicate no more than seven subject matter areas with which you have expertise:

Subject Matter	Mediation	Private Binding Arbitration	Neutral Evaluation
Personal Injury			
Employment			
Business			
Real Estate/Eminent Domain			
Probate: Estates and/or Conservatorships			
Construction Defect			
Public Agency			
Insurance			
Legal Malpractice			
Medical/Dental Malpractice			
Environmental			
Intellectual Property			
Securities			
Class action/complex litigation			
Other Areas of Subject Matter Expertise (Specify)			

Working Style

Mediators: Please characterize the primary thrust of your mediation style:

_____ Facilitative/Nondirective (does not tend to make substantive evaluations but may make process suggestions)

_____ Evaluative/Directive (takes a strong role in leading parties to a solution, more of a settlement conference style)

_____ Other/Comments

If you would like to characterize your style for other ADR processes please do so.

III. TRAINING, EXPERIENCE AND PERFORMANCE REQUIREMENTS

For mediation panel applicants: Please check off which combination of training and experience (Track A, B or C) you believe qualifies you for inclusion on the Civil ADR Program’s mediation panel. For other panels, check off if you believe you qualify and would like to be considered for inclusion on panel(s).

MEDIATION _____

Track A _____ Have completed at least 5 days of continuous participatory education or training including role playing in mediation and Have participated as a mediator or co-mediator in at least 5 mediations.

Track B _____ Have completed at least 2 days of continuous, participatory education or training including role playing in mediation and Have participated as a mediator or co-mediator in at least 15 mediations.

Track C _____ Provide other satisfactory evidence of mediation skills and experience.

PRIVATE ARBITRATION _____

Admitted to the practice of law for at least ten years and Have served as a neutral in at least 5 on site private arbitrations. These requirements may be modified in individual circumstances for good cause.

NEUTRAL EVALUATION _____

Admitted to the practice of law for at least ten years and, if accepted to the panel, will commit to participating in a 3-5 hour training session offered by MAP.

ADR Experience as a Neutral

Indicate ADR process used (mediation, arbitration, neutral evaluation or other), organization, number of cases, case types, number of hours, dates and location. (For example: Santa Clara Superior Court, 7 personal injury mediations, each mediation approx. 5 hours, 2001-2003, Santa Clara County.) Please be as specific as possible with regard to the number of cases and general case type while being careful not to reveal confidential case information.

(Add further pages if necessary)

ADR Training Programs Completed

Training: Organization/Trainer's Name, Number of Hrs/Dates. Indicate Med., Arb. or Neutral Evaluation (For example: Steve Rosenberg, 40 Hour Mediation Training, September 5-8, 2000).

For arbitration panel applicants, please indicate the number of arbitrations you have conducted which were:
Binding Arbitrations: _____ Non-Binding Judicial Arbitrations: _____

Are you currently an ADR neutral? Yes _____ No _____
(Check as many as apply)

Private Practice Firm Organization Volunteer Agency Court

Firm name: _____

ADR organization(s): _____

Volunteer agency name(s): _____

Court approved ADR list (indicate which court ADR programs): _____

Other agencies or organizations for which you are an approved neutral: _____

Education

<u>School</u>	<u>Course of Study</u>	<u>Dates</u>	<u>Degree/Certificates</u>
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Membership in Professional Organizations

Professional and/or Personal Diversity

Please describe what elements of professional and/or personal diversity you would bring to the Civil ADR Program if selected for the panel (please use additional pages if necessary): _____

References

Please list only persons with whom you have worked as a **neutral**. Provide three references for **each** panel on which you are applying to serve. We encourage you to be mindful of the confidentiality requirements and to seek prior permission to use these names. (Add pages if necessary)

Attorney: _____ or Client: _____ in
a Mediation: _____ Arbitration: _____ Neutral Evaluation: _____ Other (specify): _____
Name: _____
Position: _____
Organization: _____
Address: _____

Telephone Number: _____ Fax Number: _____

Attorney: _____ or Client: _____ in
a Mediation: _____ Arbitration: _____ Neutral Evaluation: _____ Other (specify): _____
Name: _____
Position: _____
Organization: _____
Address: _____

Telephone Number: _____ Fax Number: _____

Attorney: _____ or Client: _____ in
a Mediation: _____ Arbitration: _____ Neutral Evaluation: _____ Other (specify): _____
Name: _____
Position: _____
Organization: _____
Address: _____

Telephone Number: _____ Fax Number: _____

Insurance

Please identify what insurance coverage you have which will be applicable to ADR services:

Coverage Type: _____
Carrier name: _____
Limits: _____

(Insurance coverage may become a requirement for panel membership at some future date.)

Have you ever been convicted of a felony or misdemeanor? _____ If so, on a separate sheet of paper please list all convictions since your 18th birthday including: offense, date and place of conviction and sentence and the date of release from custody and/or probation/parole. Driving under the influence must be reported.

Have you ever had any disciplinary actions taken against you by any state, federal or professional licensing board/agency? _____ If so, please describe the nature of the offense, date of disciplinary action, length of sentence/probation and amount of restitution, if any.

Criminal or disciplinary actions will not automatically bar you from inclusion in the program. Each case is considered individually. However, failure to list criminal convictions or professional disciplinary actions taken against you will result in automatic removal from the program.

To All Applicants:

If accepted to the Civil and/or Probate ADR Programs, I consent to:

- Comply with the Rules of Operation including, if necessary, being removed from the panel for failure to comply with the Rules
- Attend a local two-hour training and panelist orientation.
- Disclose to both counsel and parties the mediation approaches you most often utilize (e.g., directive vs. facilitative, a combination of styles, etc.).
- Disclose all fees to counsel and parties.
- Disclose any potential conflicts of interest.
- Be available to conduct ADR sessions in San Mateo County if requested by the parties.
- Agree to handle cases involving self-represented litigants.
- Agree to handle at least one case per calendar year on a pro bono or modest means basis (in keeping with program requirements and California Rule of Court §10.781(b)(2)).
- Fully fill out and return, and encourage ADR participants to fill out and return, evaluation forms within 10 days following the final ADR session (in accordance with Local Rule 2.3(i)(5) and in keeping with California Rule of Court §10.782(b)).
- Report to MAP staff any criminal convictions in which you are involved as well as any disciplinary action taken against you by any state, federal or professional licensing board and/or agency.
- Be available for observation by MAP staff with the consent of counsel and parties.

My signature below certifies that I have made full and accurate disclosure of all information requested in this application form.

Signature: _____

Date: _____

Please return application to:

Multi Option ADR Project
Civil & Probate ADR Program
San Mateo County Superior Court
400 County Center,
Redwood City, CA 94063

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