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CLIENT ENGAGEMENT FRAMEWORK & EXPECTATIONS

This document outlines the framework and expectations for conduct, communication, and participation in specialized family law clinical and reporting services. These standards ensure efficiency, fairness, and respect for all clients. Engagement confirms acceptance of these expectations as indicated in the intake form.

PROCESS CONTROL

- the structure and process of each service are detailed on the website under its respective category page.
- appointments and timelines are set after the intake process is completed to ensure timely completion.
- clients are assigned a date and time, typically at least two (2) weeks in advance, in order to maintain procedural momentum and avoid delay.
- unavailability without valid and documented cause (illness, court appearance, unavoidable professional obligation) will not delay the process.
- a client's absence, unreasonably delayed response, non-response, or refusal to attend a scheduled appointment will be noted in any final report or submission, and may be documented and reported to counsel or the Court. In most cases, the process continues without that party's participation.

SCOPE

- services may include Hear the Child Reports, Views of the Child Reports, Section 211 Parenting Assessments, Family Reunification Assessments, Co-Parenting Assessments, Customized Reports and Assessments, Expert Testimony, and/or other related reporting or clinical services.
- each service has a defined purpose and scope, and has defined limits; for example, a Views of the Child Report is not a Parenting Assessment and does not include evidence or document collection or submission unless specifically requested or otherwise agreed upon by all parties and/or counsel, or ordered by the Court.
- services do not include legal advice, case strategy, or advocacy; legal and procedural questions must be directed to counsel.
- the service provider is not to be drawn in to disputes, negotiations, or correspondence outside the defined role and scope of the service being provided.

COMMUNICATION

- follow instructions, timelines, and document requests exactly as provided.
- read correspondence in full before replying or asking questions.
- all communications, decisions, and involvement of other professionals affecting the family dynamic will be directed through this office.

- do not independently alter parenting arrangements, schedules, or routines without prior consultation and approval.
- do not initiate or participate in external counselling, therapeutic services, or related supports involving the child(ren) without prior consultation and approval, or retain additional professionals for yourself (i.e. counsellors, coaches, consultants, assessors) without prior consultation and approval.
- do not engage in substantive communications with the other parent, the child(ren), or collateral parties outside of the established process where such communication may impact the clinical work, or outside of previously established routines from the time of your engagement; these routines may continue if deemed to be clinically-appropriate.
- clients are expected to disclose any existing or proposed external involvement that may affect the process.
- failure to adhere to this framework may compromise the integrity of the process and may result in delays, additional costs, or reassessment, suspension, or termination of service.
- clients with counsel should direct their counsel's enquiries regarding status updates or other information through the clients first, prior to contacting this office.
- communicate respectfully, concisely, and within the defined scope of service.
- e-mail is the only accepted method for administrative or process-related communication.
- e-mails, unless containing personal, confidential, and/or privileged information should be sent and copied to all involved, using reply-all as needed to ensure transparency and to reduce administrative burden due to follow-up time or additional communications.
- internal procedures, interview formats, and reporting methods are not subject to negotiation or preview.
- emotional appeals, arguments, or attempts to re-litigate prior issues will be redirected to counsel or the Court, and may result in termination of services.
- excessive, repetitive, or inappropriate correspondence may result in communication limits or formal protocols being imposed, and may result in termination of services.
- do not influence or interfere with other professionals that may be involved (counsellors, parenting coordinators, physicians, or other specialists); collaboration occurs only when clinically or procedurally appropriate.
- parents, guardians, and other family members must not discuss, describe, or attempt to explain these services, the process, or the service provider's role to the child(ren) unless explicitly directed to do so.
- when communication is required, parents will be provided with clear instructions regarding what may and may not be said to the child(ren).
- children will be told that they may inform the service provider if a parent or other adult speaks about the process in a way that differs from those directions.
- any such disclosures will be documented and may be communicated to counsel or the Court as deemed appropriate.
- any and all updates (changes in counsel, professionals involved, etc...) must be communicated in a timely manner to all involved.

DOCUMENTS & SUBMISSIONS

- submit documents only when requested - unsolicited or repeated resubmissions will not be reviewed.
- notes and documentation methods are confidential and governed by professional standards and legislation, unless otherwise specified.

- clients with counsel should ensure that, while services are actively taking place, any and all activity with respect to court applications or proceedings are limited to necessities and that these are communicated to this office.
- in the event that documentation (i.e. orders, determinations, etc...) are required, it is expected that the contents of such documents are communicated to this office prior to being finalized, and ideally prior to being drafted, to ensure any clinical impact is minimized.

PROCEDURAL FAIRNESS

- all parties are provided equal opportunity to participate; for example, if one parent requests an additional appointment, and it is granted, the other will be offered the same.
- once sufficient evidence is gathered (if applicable to the service being provided), the process proceeds regardless of disagreement or further correspondence.
- ongoing debate or challenge to expert opinions will not alter the process or conclusions/recommendations.
- interfering, back-channelling, or otherwise independently or unilaterally making decisions regarding service, including making arrangements for visitation, exposure, or other interaction with a child or children without clinical direction is prohibited (this includes contents of any orders, determinations, or agreements without consultation through this office to determine clinical significance, if any).

PROFESSIONAL CONTEXT & COMMON PATTERNS

- these expectations exist because the same common patterns of conflict and behaviour appear in nearly every matter.
- with nearly 30 years of experience working with children and families in high-conflict, court-involved, and high-net-worth contexts, there is very little that has not been seen or managed.
- it is common for one or more participants to be resistant, reluctant, non-responsive, or uncooperative; this is fully-anticipated, and does not change the process or timelines.
- no participant, parent, or circumstance is exempt from these standards; the names and details may change, but the underlying dynamics, issues, strategies, and tactics are predictable.
- the process proceeds according to established methods, uninhibited by personal preference, persuasion, or pressure.
- cooperation and adherence to these expectations ensure that services are delivered efficiently, neutrally, and free of unnecessary conflict.