

PRIVATE PARENTING PLAN ASSESSMENT CONTRACT

I, _____, understand that Chantal Bourgeois, BSW, MSW, RSW, is acting as an independent Clinician/Registered Social Worker/Parenting Assessor. Ms. Bourgeois shall perform a comprehensive parenting assessment and provide recommendations regarding the decision-making responsibilities and parenting time of my child(ren), namely: _____, which may be used for helping resolve the parenting dispute and proceedings in family court.

Please read the following stipulations and sign at the bottom to indicate that you have read and understand them all.

1. The **assessment process** shall include the following:

- a. Pre-interview/intake forms shall be sent to parents once their contracts and retainers have been received. They should be completed by parents and submitted at least two working days prior to their scheduled individual interviews in order to give time for Ms. Bourgeois to review before the parent meeting and prepare parent consents for professional collaterals.
- b. Individual parent interviews: Parents shall have the option of completing an in-depth interview in person at their home or by videoconference. You can expect that there will be a need for follow-up emails/interviews during the process. Following this detailed interview(s), there will be continued contact with parents throughout the assessment process. Parents may contact this clinician to express any additional concerns or issues following their individual interview, and the clinician may contact either party for issues requiring further clarification. It is important that the evaluator be kept up to date with any changes in the parent or family situations. The evaluator may contact either party during the assessment to seek further clarification of concerns, allegations, issues, or information gathered.
- c. Observational interviews (approx. 1.5 hours to 2 hours) shall be conducted with each parent and their child(ren) in each parent's home and/or the normal location of the parent-child access. The observation should include the persons normally present in the home, such as stepparents, stepsiblings, grandparents, or roommates. The parties agree to be present during the course of the observation and shall not expect the evaluator to care for the child alone. The parties are responsible for coordinating the transportation arrangements for these observations. Unless access is being held at a supervised access center, these observations will most often take place during the day (Monday to Friday) and may require parents and children to take a small amount of time off of work/school and/or exceptionally adapt the parenting schedule to facilitate the observation.

Young children unable to be interviewed: If a child is too young to be reliably interviewed, two observations with each parent shall be conducted in order to comprehensively assess the developmental needs and personality of the child and the parent-child interactions.

- d. A minimum of three individual interviews with the child(ren) shall be conducted in person (first choice) or by videoconference in case of check-ups or new COVID lockdowns. If the interviews occur at home because of COVID school lockdowns, school not permitting the interviews to be held on their premises or it being summertime, the interviews shall alternate being held in each parent's homes. For the third interview, it will be arranged at a time convenient to the assessor prior to the disclosure meeting or may respect the child's preference for location. In the case of allegations of parental influence/coaching, the final interview will be divided in two and one held at each parent's home.

The interviews with the child(ren) are not intended to be stressful and shall utilize different play and other techniques to increase the children's comfort level. There is a minimum of three weeks left in between each child interview to assess consistency over time. The last interview shall be scheduled as close to the disclosure meeting as possible.

If a child is too young to be reliably interviewed and attends daycare, she/he shall also be observed in their daycare setting with their peers on one occasion, if accessible and open during COVID-19.

- e. Parent's new partners or spouses living with the parent and child(ren) in the home shall be interviewed individually (in person or virtually) and they are expected to be present for the family observation. They will also be asked to consent to conduct a police and CAS check on their behalf. New partners not living with the parent and children will be interviewed by telephone. If a parent is proposing to have their new partner live with them and the children in the future, then they shall be interviewed individually in person or virtually and a police and CAS check shall also be conducted.
- f. Stepsiblings and half-siblings living with the child(ren) shall also be interviewed (if old enough) in person and they should likewise be present for the observation. Normally, they will be individually interviewed just prior or following the family observation in a private location.
- g. Collateral interviews with professionals associated with the family (police, child protection agency/workers,, community organizations, child's therapists/psychologists/ counsellors, child's doctors, child's dentist, optometrist or other involved medical professional, CHEO, child's teacher(s), day care provider, parent's doctors/ therapists/psychologists/counsellors, parent's past couple counsellor, past therapists, etc.) shall be performed by telephone or by obtaining written feedback/disclosure of information and records. In some unusual cases, an in-person interview shall be conducted. Parents are expected to provide a list of all involved professionals with them and their children at the onset of the process. It is important that consents be signed quickly at the onset of the process as it takes a significant amount of time to receive

documentation or information back from a variety of professionals. If the parent has received counselling through their Employee Assistance Program (EAP), they will need to directly request disclosure of their records and then send this assessor a copy. Unfortunately, EAPs do not release records to assessors directly and involved professionals typically decline to be interviewed if operating under the EAP.

- h. Collateral interviews with family members or friends – In addition to new partners/spouses, stepsiblings or halfsiblings, parents may select up to two family member(s) or friend(s) to be interviewed if they are often in a caregiving role or they are/have been particularly involved in the current family situation or may have witnessed something in particular. These interviews shall be conducted by telephone or virtually. If parents wish to add more personal collaterals, then the other parent shall likewise be given the opportunity to add more collaterals on their side to ensure it is balanced.
- i. Legal documents: Counsel shall provide a copy of all non-financial pleadings, court orders, agreements, restraining orders, etc. filed in the case. If there is a court appearance or upcoming court date, this assessor shall be informed and provided any of the relevant orders/pleadings. If there are any new police or child protection investigations opened during this process, the evaluator must be informed, as the assessment must be put on hold until the investigation is complete.
- j. Other written materials: Parents may choose to send text messages, emails or other documentation, but please limit it to a reasonable amount to highlight a specific issue or concern. Please also ensure that you provide the context of text messages with dates, who is speaking, and the full conversation of the difficult dialogue in order to see the lead-up and end to text exchange. Please ensure that the other parent is provided with a copy of this information so that he/she may have the opportunity to respond. The time taken to review this documentation is billed.
- k. A disclosure meeting (approx. 2-3 hours) is convened with both parties, their respective legal counsel and involved mediator (if desired) at the close of the assessment in order to disclose this assessor's findings, impressions and recommendations. This meeting will be held virtually or moved to an in-person format when the public health conditions change. Discussions during the disclosure meeting are "open," and therefore may be included in the report. This meeting can also be used as an opportunity to resolve the matter. The content of any settlement discussions, however, are considered "closed," therefore cannot be used in the report. The disclosure meeting will not be held if payment for services is not up to date.
- l. A final report shall be submitted at the disclosure meeting (if in-person) and final payment is required in advance of the disclosure meeting and submission of this report. If the meeting is a virtual disclosure meeting, the report shall be sent by email (PDF) on the same day following the disclosure meeting. A full report shall include the purpose of the report, the sources of the information, summary of the legal decision-making responsibilities and parenting history,

- current and historical decision-making and parenting arrangements, summary of each party's parenting concerns, parent's parenting plans, individual parent histories, parent relationship history, detailed child(ren) information according to the parents, children's experiences, views and preferences, new partner history, summary of all collateral interviews and reports, analysis of the observations and child interviews, clinical impressions and discussion, and detailed, structured decision-making responsibilities and parenting plan recommendations. A report shall not be submitted if the parties are not up to date for the payment of clinical services.
- m. Duration of process: The assessment process will typically take approximately 90 days from the time of parent interviews to the point of the final disclosure meeting and the report being submitted. The process may be extended depending on the delays associated with scheduling appointments, obtaining collateral information or other issues outside this assessor's control.
- n. Language: Parents may choose to have interviews and consents completed in English or French, but the final report shall be prepared in English.
2. Format of interviews and COVID: The initial parent interviews shall be held at your home and follow-up interviews can be done by Zoom or telephone. If there is another COVID lockdown, we will assess the best approach to ensure everyone's health and safety. If you prefer the wearing of masks, this assessor will accommodate your preference. Ms. Bourgeois has received two COVID vaccines plus two additional boosters. If a participant has tested positive for COVID or has significant symptoms suggestive of COVID, then the visit should be cancelled and scheduled at a time when everyone is healthy. All participants (including Ms. Bourgeois) waive any liability associated with any inadvertent and non-purposeful exposure to COVID-19 during the interviews or observations. Following the visit, if one participant develops symptoms of COVID-19 or receives a positive diagnosis of COVID-19, they shall commit to informing all participants.
3. Virtual Interviews: For virtual interviews, parents will need to have access to a cell phone or computer with a camera and microphone and internet/data on their cell phone. An invite will be sent by prior to the interview. Parents must commit to being in a private location without other family members present who can overhear the conversation. These interviews should never be recorded. Certain documents will be sent to you via email, which you may print or look at electronically.
4. Cost: The above parenting assessment services shall be charged at a rate of **\$225 per hour** plus HST, travel, and collateral fees. The duration of the assessment is dependent on the length of parent interviews and extent of ongoing parent communication, complexity of the case, number of children involved, length of children's interviews, the amount of collateral information required, and the length of the report.
5. Travel Time and Mileage: In order to simplify travel fees, they are combined at set rates depending on your location. Below is the set amount by region per trip:

Ottawa region: \$150
Prescott-Russell region: \$75

Stormont, Dundas and Glengarry: \$75
Leeds and Grenville: \$200
Kingston region: \$275

6. Terms of Payment: The parents agree to equally share the total costs of the assessment. The parties agree that a **retainer deposit of \$7,000** is payable at the onset of the assessment. Clients shall receive a detailed invoice outlining the work completed. Parents will be invoiced for any work above the retainer amount, and payment is due upon receipt. Final payment is required prior to the disclosure meeting and submission of the report. Payment may be made by Interac e-transfer to cbourgeois@chantalbourgeois.ca or cheque payable to *Chantal Bourgeois*.
7. Responsible Party for Payment: It is understood that both parties shall equally cover the full costs of this parenting assessment, unless otherwise specified.
8. Disbursements: Charges for collateral reports, courier fees, fax, or photocopying fees (\$0.10 per page), and excessive long-distance telephone charges shall be charged.
9. Insurance Receipts: For some clients, insurance coverage may be a possibility for the portion associated with individual parent interviews, child interviews, observations, joint disclosure meeting, and report writing. Please feel free to use the invoice for seeking reimbursement from your insurance company. My professional certification number is noted at the top right of the invoice/receipt.
10. Audio and Visual Recording: In order to preserve the integrity of the process, parents are not permitted to record any of the interviews, telephone calls, virtual interviews, observations, or the disclosure meeting.
11. Cancellation: The client must provide at least 24-hour notice of cancellation of any interview. Please note that visit times may not be easily changed without sufficient prior notice. Three cancellations may result in re-evaluation of services and possibly termination of services. In the event that a client does not show up for an appointment and does not provide sufficient notice, then there shall be a charge of \$60.
12. Transparency and Confidentiality: Due to the nature of a parenting assessment, the content of interviews and information received from all parties and collaterals are open for disclosure to both parties for the purpose of disclosing findings and preparing the final written report. Concerns or allegations shared by a parent will be shared with the other parent in order to receive their perspective. This process is therefore transparent and nothing a parent shares is kept secret from the other. In the event that a parent has security concerns regarding their address being known by the other parent, then their address is not shared.
13. Child Protection Concerns: It is an entrenched legal and professional obligation that child protection authorities be informed if this assessor becomes aware of a child protection concern during this process. Inappropriate physical touching between adults and children will result in the immediate

termination of a visit and may lead to the incident being reported to the local child protection agency. In this case, this process will be put on hold until child protection authorities complete their investigation.

14. Assessor Position: This assessor does not represent the interests of either party, regardless of which lawyer referred the case to the evaluator or which parent is covering the cost of this evaluation. If there is any bias that exists, it is toward the best interests of the child.
15. Physical Safety: The safety and security of all parties, including this assessor, is of utmost importance. Interviews shall not be conducted with anyone under the influence of drugs and/or alcohol or with anyone exhibiting threatening or unusual behaviour that may pose harm to themselves, the other parent, or the child. In the event that either party threatens the physical safety of this assessor or the other party, then a referral shall be made to the appropriate police department for further assistance. Harassment or threatening behaviour may be grounds to terminate the assessment process.
16. Disputing the report: If you dispute part of the content in the report, then your legal counsel (or you if self-represented) may submit a written dispute and you need to copy both legal counsel in your correspondence. An amendment to the report is only provided for factual errors and will not include differences of opinion or countering the other parent's reports/position. If you do not recall reporting or stating something in the report, this assessor will verify her notes and documentation to confirm that is the case and will make an amendment, if appropriate. Additionally, the professional and personal collateral information is information provided by other individuals/professionals/reports and not this assessor's factual information. Any information contained within the child(ren)'s section will not be altered as it is based on the child(ren)'s views.
17. Testifying at Court: This assessor may be called as a witness at trial assuming that sufficient notice is given to clear her schedule in order to attend court. The parent requesting this assessor's testimony or issuing a summons/subpoena shall be responsible for all of the associated costs, including the hourly tariff (preparation time and court time) transportation charges and disbursement fees.

I, _____, agree to the terms and conditions of this document, which is signed in _____ the _____ day of _____ 2023.

Name of Parent

Signature of Parent

Chantal Bourgeois, BSW, MSW, RSW

Parent's Contact Info:

Preferred Pronoun (He/She/They) _____

Street and Apt _____

City _____

Postal Code _____

Email: _____

Home Tel: _____ Cell Tel: _____

Your Lawyer's Contact Info:

Self-represented: YES or NO

Name of Lawyer: _____

Name of Firm: _____

Street _____

City _____

Postal Code _____

Email: _____

Work Tel: _____ Fax Tel: _____

Name of the other parent: _____

Email of the other parent: _____

Tel. number of the other parent: _____

Is there a non-contact order in place preventing contact between both parents? NO YES, When does it expire? _____

Does the child(ren) have contact with this parent? NO YES, If so, where does it occur (home, community or supervised access center)? _____

Children's Information:

Child (1) Name: _____ **Preferred pronoun (He/She/They):** _____

Date of Birth (month/day/year): _____ **Current Grade:** _____

Name & Address of School or Daycare: _____

Child (2) Name: _____ **Preferred pronoun (He/She/They):** _____

Date of Birth (month/day/year): _____ **Current Grade:** _____

Name & Address of School or Daycare: _____

Child (3) Name: _____ **Preferred pronoun (He/She/They):** _____

Date of Birth (month/day/year): _____ **Current Grade:** _____

Name & Address of School or Daycare: _____
