Interview Template for Family Law Advocates

Introduce yourself and your agency	Hello [client], my name is [interviewer]. I am the Family Law Advocate at [agency]. Are you able to speak privately and candidly with me now? ***If no – reschedule.*** Have you used our services before? ***If yes – skip or truncate description.*** Let me give you a brief rundown on our services so that you know what we do, and don't do:
Provide a brief, plain language overview of your agency's services.	[*EXAMPLE:* The Law Centre is a clinical program of the University of Victoria's Faculty of Law. We provide free legal services to individuals with low incomes. However, we do not cover things like fees for filing documents with the court or hiring process servers. Because most of the work is done by students, under the supervision of lawyers, there are limits to the legal matters we can take on. For example, we do not represent clients on contested Supreme Court matters involving property or debt. Also, students cannot provide legal advice without it first being approved by lawyers.] Do you have any questions about this?
Explain the interview process and confidentiality	I'm going to ask you to tell me about your issue in your own words. I will also ask questions if I need clarification or to fill in any blanks. Then I will let you know how we may able to help, whether with some summary [advice or information] or by opening a file. What you say to me is <u>confidential</u>, but it is not <u>privileged</u>. This means it does not have the same level of protection as a conversation between a lawyer and a client. However, no family law advocate has, to date, been subpoenaed by the court and the chances of that happening are small.
Conduct Interview	Would you like to tell me about your situation now? *Use the table on the following page to track client's answers.*
Describe scope of service / retainer agreement	We are going to open a file to assist you with [specify matter], within the terms of our [scope of services or retainer] agreement. This is a sort of contract confirming the specific issue that we will be working on. If other issues come up, you may need to book another intake. The agreement says that it is your responsibility to provide us with any changes to your contact info, and to keep in touch with us, including making and keeping appointments and providing us with requested documents. It also says that we may close a client's file if we cannot agree as to how to handle their matter.
Tailor closing to outcome	*If opening a file – go over next steps (gathering documents, another meeting, etc.)* *If summary advice only:* Thank you for your time. I hope you found our conversation helpful. Please feel free to contact us again if you could use our assistance in the future.

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Fill in the information as the client speaks. If they aren't sure where to start, try prompting:

I know this can be difficult to talk about. Don't worry about covering every detail. Just do your best to start at the beginning, and I will help by asking questions to make sure I have the information I need.

Client info	*Name, annual income, job title, education, any other relevant information* • Scoop:
Opposing Party (OP) info	*Name, annual income, job title, education, any other relevant information* • Scoop:
Family Violence	*Physical, emotional, financial* • Scoop:
Start/end of Relationship	*Key dates used to determine debt/asset obligations/entitlements (regardless of whether parties agree on dates)* • Date of Cohabitation: • Date of Marriage: • Date of Separation: Scoop:
Child[ren]	*Names, birthdates, any other relevant info e.g. disabilities/differing abilities* • Scoop:
Debts in either party's name amassed during relationship	*Loans, credit cards, mortgages (specify joint or in one party's name). Also specify if any debts pre-date the date of cohabitation, or were amassed after separation* • Scoop:
Assets in either party's names amassed during the relationship	*Pensions, CPP, investments, bank accounts (specify joint or in one party's name). Also specify if any assets pre-date the date of cohabitation, or were acquired after separation* • *Real property (is client's name on title?)* • *Household contents* • Scoop:
Court proceedings	*Any claims filed or served? Dates? Provincial or Supreme Court? History of negotiations?* • Scoop:
Client goal(s)	*What outcome does the client want? What are their priorities/values?* • Scoop:
Big Scoop	*Is there anything else at all that I should know?* •