



## **CLIENT-FACING POLICIES**

**Guiding Ethical, Professional, and Values-Aligned Client Partnerships**



## 2.0 Client-Facing Policies Overview

*Setting Clear Expectations for a Principled, Human-Centered Partnership*

**Human Value Initiative's** client-facing policies establish the shared expectations, responsibilities, and boundaries that support a healthy, effective, and values-aligned consulting relationship. These policies ensure that every engagement—whether coaching, advisory work, leadership development, or strategic facilitation—is grounded in clarity, professionalism, and mutual respect.

Because HVI operates in emotionally complex, high-stakes environments, clients rely on us not only for expertise but also for steadiness, discretion, and principled leadership. These policies articulate how we partner with clients, how we maintain psychological safety, and how we uphold the PROVIDE™ Values throughout every interaction.

### **Purpose of Client-Facing Policies**

- This section exists to:
- Establish transparent expectations for how HVI and the client will work together
- Clarify roles, responsibilities, and boundaries to protect the integrity of the engagement
- Ensure consistent, high-quality experiences across all service types
- Reinforce ethical standards, confidentiality, and professional conduct
- Support predictable, respectful communication and collaboration
- Provide a reference point for resolving misunderstandings or misaligned expectations

### **Scope**

*These policies apply to all client engagements, including:*

- Executive coaching
- Fractional CHRO partnerships
- Leadership development programs
- Workshops, retreats, and facilitated sessions
- Strategic advisory services
- Special projects and custom engagements

They complement the terms outlined in client agreements and do not replace contractual obligations. Instead, they provide the behavioral, relational, and operational framework that ensures each engagement is conducted with integrity, clarity, and respect.



## Guiding Principles

All client-facing policies reflect HVI's PROVIDE™ Values and are grounded in:

- **Presence**
- **Respect**
- **Ownership**
- **Vulnerability**
- **Integrity**
- **Discipline**
- **Empathy**

These principles guide how we communicate, how we navigate challenges, and how we support clients through growth, complexity, and change.

## Structure of This Section

Part II includes the following policies:

- [2.1 Engagement Expectations](#)
- [2.2 Client Responsibilities](#)
- [2.3 Coaching & Advisory Boundaries](#)
- [2.4 Cancellation & Rescheduling](#)
- [2.5 Confidentiality & Mutual Respect](#)
- [2.6 Deliverables & Ownership](#)
- [2.7 Feedback & Continuous Improvement](#)

## 2.1 Engagement Expectations

*Establishing Clarity, Professionalism, and Mutual Commitment*

Human Value Initiative is committed to creating a consulting and coaching environment grounded in clarity, trust, and principled partnership. These engagement expectations outline how HVI and the client work together to ensure a productive, respectful, and values-aligned relationship.

### Purpose

This policy defines the behavioral, relational, and operational expectations that guide all client engagements.

#### 2.1.1 Expectations of Human Value Initiative



Human Value Initiative commits to:

- Provide high-quality, human-centered service
- Maintain clarity and transparency
- Honor confidentiality
- Model ethical leadership
- Uphold professional boundaries
- Respond within reasonable timeframes
- Prepare thoroughly for all sessions and deliverables
- Demonstrate accountability

### **2.1.2 Expectations of the Client**

Clients are expected to:

- Engage actively and honestly
- Honor agreed-upon boundaries
- Provide timely information and context
- Prepare for sessions and deliverables
- Communicate scheduling needs promptly
- Maintain respectful conduct
- Support psychological safety
- Meet financial commitments
- Demonstrate accountability

### **2.1.3 Mutual Commitments**

Both HVI and the client commit to:

- Create a psychologically safe environment
- Address issues early
- Collaborate in good faith
- Hold one another accountable
- Uphold the PROVIDE™ Values

## **2.2 Client Responsibilities**

Shared Accountability for a Successful, Values-Aligned Engagement

Human Value Initiative approaches every engagement as a partnership. While HVI provides expertise, structure, and principled leadership, the effectiveness of the work depends equally on the client's active participation.



## **Purpose**

This policy establishes the expectations clients must uphold to support the integrity, efficiency, and impact of the engagement.

### **2.2.1 Client Responsibilities**

Clients are expected to:

- Engage fully and honestly
- Provide timely and relevant information
- Honor professional boundaries
- Prepare for sessions and deliverables
- Communicate scheduling needs promptly
- Maintain respectful conduct
- Support psychological safety
- Meet financial commitments
- Demonstrate accountability

### **2.2.2 Collaboration and Accountability**

Clients acknowledge that:

- Outcomes depend on shared responsibility
- Coaching requires follow-through between sessions
- Leadership development is iterative
- Raising concerns early prevents escalation
- Accountability strengthens trust

### **2.2.3 Application**

These responsibilities apply to all service types and complement contractual terms.

## **2.3 Coaching & Advisory Boundaries**

Protecting the Integrity, Safety, and Professionalism of the Coaching Relationship

**Human Value Initiative** provides coaching and advisory services grounded in emotional intelligence, ethical leadership, and the **PROVIDE™ Values**.

## **Purpose**

This policy establishes the professional boundaries that guide all coaching and advisory relationships.



### **2.3.1 Scope of Coaching & Advisory Services**

Includes:

- Leadership development
- Executive coaching
- Strategic thought partnership
- Organizational insight
- Behavioral and relational skill-building
- Support navigating complexity and change

**Coaching is not therapy, legal counsel, or crisis intervention.**

### **2.3.2 Professional Boundaries**

Includes:

- Role clarity
- Confidentiality limits
- Communication boundaries
- Session boundaries
- Emotional boundaries
- Decision-making boundaries
- Shared accountability for boundaries

### **2.3.3 Client Responsibilities Within Boundaries**

Clients must:

- Engage honestly
- Maintain relational boundaries
- Avoid dual-role situations
- Communicate concerns promptly
- Seek external support when needed

### **2.3.4 Boundary Violations**

Examples include:

- Requests for crisis response
- Attempts to involve HVI in personnel decisions
- Sharing information requiring therapeutic intervention
- Expectations of unlimited access



- Requests compromising confidentiality or neutrality

### **2.3.5 Commitment to Ethical Practice**

Grounded in:

- Integrity
- Respect
- Presence
- Discipline
- Empathy
- Accountability

## **2.4 Cancellation & Rescheduling**

Protecting Time, Professionalism, and the Integrity of the Engagement

Human Value Initiative maintains a disciplined, respectful approach to scheduling.

### **Purpose**

This policy ensures responsible scheduling practices that support the effectiveness and fairness of the engagement.

#### **2.4.1 General Expectations**

Both parties must:

- Communicate changes early
- Honor meeting times
- Respect preparation requirements
- Maintain accountability

#### **2.4.2 Client-Initiated Changes**

- 24-hour notice required
- Late cancellations may be billed
- Repeated cancellations may prompt review
- Workshops/retreats follow contract-specific timelines

#### **2.4.3 HVI-Initiated Changes**

- HVI commits to:
- Provide reasonable notice
- Avoid last-minute changes



- Offer timely alternatives
- Maintain accountability

#### **2.4.4 Late Arrivals**

- Sessions end at scheduled time
- 15+ minutes late may count as cancellation

#### **2.4.5 Workshops, Retreats & Events**

- Governed by contract
- Late cancellations may incur fees
- Rescheduling may require additional planning

#### **2.4.6 Emergency Exceptions**

##### **May apply in cases of:**

- Medical emergencies
- Family crises
- Significant unforeseen events

#### **2.4.7 Accountability**

Both parties share responsibility for predictable scheduling and professional stewardship.

## **2.5 Confidentiality & Mutual Respect**

*Upholding Trust, Dignity, and Ethical Partnership*

Confidentiality and mutual respect are foundational to every engagement.

### **Purpose**

**This policy establishes standards for confidentiality, respectful communication, and professional conduct.**

#### **2.5.1 Confidentiality Standards — HVI Commitments**

##### **HVI commits to:**

- Protect all sensitive information
- Use secure systems
- Limit access to authorized individuals
- Honor privacy
- Clarify confidentiality limits



## 2.5.2 Confidentiality Standards — Client Commitments

### Clients must:

- Protect HVI's proprietary materials
- Respect others' privacy
- Use discretion when discussing the engagement

## 2.5.3 Mutual Respect Standards

### HVI commits to:

- Model respectful communication
- Honor lived experience
- Maintain neutrality
- Demonstrate accountability

### Clients commit to:

- Engage with courtesy
- Honor emotional boundaries
- Support psychological safety
- Demonstrate accountability

## 2.5.4 Shared Commitments

### Both parties agree to:

- Uphold PROVIDE™ Values
- Address concerns early
- Maintain a non-discriminatory environment
- Protect psychological safety

## 2.5.5 Violations & Resolution

### HVI will:

- Address issues promptly
- Clarify expectations
- Adjust engagement if needed
- Discontinue engagement if necessary

## 2.6 Deliverables & Ownership

*Clarifying Rights, Responsibilities, and the Stewardship of Intellectual Property*



## **Purpose**

This policy defines deliverables, ownership rights, and expectations for use.

### **2.6.1 Definition of Deliverables**

May include:

- Reports
- Leadership materials
- Agendas
- Tools and templates
- Strategic documents
- Session summaries
- Slide decks

### **2.6.2 Ownership of Intellectual Property**

**HVI retains ownership of:**

- Frameworks
- Templates
- Curriculum
- Written content
- Designs
- Derivative works

Clients receive an internal-use license only.

### **2.6.3 Client Use of Deliverables**

Clients may:

- Use deliverables internally
- Share with relevant team members

**Clients must:**

- Protect proprietary materials
- Store securely
- Request permission for external use

### **2.6.4 Revisions & Updates**

- One round included



- Additional revisions billed
- Post-project updates treated as new work

### **2.6.5 Access to Working Files**

- Editable source files not provided unless contracted
- Clients receive final deliverables only

### **2.6.6 Confidentiality of Deliverables**

Both parties commit to secure storage and discretion.

### **2.6.7 Accountability**

Both parties must honor IP rights and confidentiality.

## **2.7 Feedback & Continuous Improvement**

Strengthening the Partnership Through Reflection, Dialogue, and Iterative Growth

### **Purpose**

This policy establishes expectations for gathering, sharing, and integrating feedback.

#### **2.7.1 HVI's Commitment**

HVI commits to:

- Invite honest feedback
- Respond with openness
- Adapt when appropriate
- Maintain accountability
- Model reflective practice

#### **2.7.2 Client's Role**

Clients are encouraged to:

- Share feedback early
- Engage in open dialogue
- Reflect on their participation
- Demonstrate accountability
- Support a learning-oriented partnership

#### **2.7.3 Feedback Methods**



May include:

- Verbal check-ins
- Post-session reflections
- Mid-engagement reviews
- End-of-program evaluations
- Anonymous surveys
- Direct communication

#### **2.7.4 Addressing Concerns**

If concerns arise:

- HVI addresses them promptly
- Expectations are clarified
- Scope or structure may be adjusted
- Engagement may be modified or concluded

#### **2.7.5 Shared Commitment to Growth**

Both parties commit to continuous improvement grounded in honesty, respect, and accountability.