



## 1. Client Intake and Contextual Information

This End-of-Life Doula Agreement ("Agreement") is made between the undersigned individual or legal decision-maker ("Client") and the contracted End-of-Life Doula ("Doula") for the provision of non-clinical, holistic support during the final stages of life. This section gathers foundational information regarding the Client, their care context, household dynamics, and decision-making representatives to ensure respectful, informed engagement.

**Full Legal Name of Client:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_ **Pronouns:** \_\_\_\_\_

**Primary Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Primary Residence or Care Setting:**

**Street:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Current Location Type:**

- ☐ Private home
- ☐ Skilled nursing facility
- ☐ Inpatient hospice
- ☐ Assisted living community
- ☐ Hospital (inpatient)
- ☐ Other: \_\_\_\_\_

**Primary Medical Diagnosis (if known or disclosed):** \_\_\_\_\_

**Is the Client currently enrolled in hospice services?**

- ☐ Yes ☐ No ☐ Pending Enrollment

If yes, name of hospice provider: \_\_\_\_\_

**Primary Contact for Scheduling and Communication (if not the Client):**

**Name:** \_\_\_\_\_

**Relationship to Client:** \_\_\_\_\_

**Phone/Email:** \_\_\_\_\_

**Authorized Health Care Proxy or Legal Decision-Maker:**

☐ Same as above ☐ Other: \_\_\_\_\_

**Phone/Email:** \_\_\_\_\_

This information enables the Doula to coordinate with existing care teams, honor appropriate decision-making boundaries, and tailor services to the Client's personal, emotional, and logistical context.

## **2. Requested Services and Support Priorities**

Please indicate which areas of end-of-life doula care are being requested. The services selected here will guide the initial scope of support. The Doula may recommend adjustments based on the Client's evolving needs, emotional state, or phase of dying.

- ☐ Emotional companionship and presence for the Client
- ☐ Life review, storytelling, or legacy project facilitation
- ☐ Vigil planning and bedside support during active dying
- ☐ Guided breathwork, meditation, or visualization practices
- ☐ Coordination with spiritual leaders or clergy (non-denominational)
- ☐ Practical household support or caregiver respite (non-medical)
- ☐ Education and advocacy for family during the dying process
- ☐ Ceremony, ritual, or cultural observance planning
- ☐ Advance care directive review or values-based care planning
- ☐ Post-death family support or early bereavement processing
- ☐ Other (please specify): \_\_\_\_\_

**Estimated Start Date for Services:** \_\_\_\_\_

**Preferred Frequency of Visits (if known):** \_\_\_\_\_

**Will support continue through the active dying phase?**

- ☐ Yes   ☐ No   ☐ Undetermined at this stage

## **3. Cultural, Spiritual, and Personal Frameworks**

This section is intended to help the Doula understand the Client's lived experiences, belief systems, emotional boundaries, and interpersonal environment. The more fully these values are understood, the more sensitively services can be adapted and delivered.

**What cultural, ancestral, or family-based traditions should be honored in this space?**

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**Are there any spiritual or religious principles the Client would like reflected in care?**

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**Are there specific phrases, topics, or actions the Doula should avoid during visits?**

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**What emotional triggers, historical traumas, or identity-based sensitivities may arise?**

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Is there a preferred communication style the Doula should follow (e.g. formal, humorous, silent presence)?

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These insights will be treated with deep respect and used to inform every interaction, ensuring that care is both attuned and non-intrusive.

#### **4. Scope of Practice and Service Limitations**

The role of an End-of-Life Doula is supportive, holistic, and non-medical in nature. The Doula provides emotional, spiritual, logistical, and advocacy-based care to both the Client and their loved ones during the end-of-life journey. This role is distinct from that of clinical providers such as hospice nurses, physicians, or licensed therapists. Services are offered without diagnosis, prescription, or treatment and are designed to complement—not replace—conventional medical care.

The Client understands and agrees to the following limitations:

- The Doula will not administer medications, monitor vital signs, or offer clinical assessments
- The Doula may not make medical decisions on behalf of the Client unless otherwise authorized through legal documentation
- Physical assistance (e.g., lifting or repositioning) will not be provided beyond light non-clinical support
- The Doula will not transport the Client or serve as a substitute for licensed in-home caregivers
- Services may be declined, rescheduled, or adapted at the Doula's discretion based on safety, ethical boundaries, or emotional readiness

By acknowledging these limitations, the Client confirms their understanding that this Agreement does not create a medical relationship and that all care decisions remain the responsibility of the Client, family, or authorized health proxy.

#### **5. Boundaries, Presence, and Emotional Containment**

The Doula's role involves deep emotional presence, quiet companionship, and the ability to hold space without judgment during moments of fear, grief, silence, or transition. The Doula is trained to listen, observe, and gently support without imposing belief systems or directing outcomes. While emotional bonds may form naturally over the course of care, the Doula maintains strict boundaries of professionalism and ethical practice at all times. Personal advice, or therapeutic interpretation will not be offered, and all sessions remain within the agreed scope of non-medical, consent-based support.

The Doula may gently offer guided visualization, conversation prompts, or resources based on the Client's stated preferences. These interventions are never mandatory. If the Client requests quiet presence only, or prefers touch-free support, these preferences will be honored. The Doula will also maintain their own emotional regulation during difficult visits, and reserves the right to take space or reschedule if burnout or vicarious trauma arises. The Client understands that the Doula is not acting as a friend, family member, counselor, or medical advocate, but as a trained end-of-life support practitioner with specific boundaries that protect both parties from role confusion or emotional overreach.

## 6. Session Structure and Service Phase Overview

The following table outlines typical components of a doula support engagement. These are flexible and will be adjusted based on the Client's health status, emotional state, spiritual orientation, and timeline.

| Phase of Service          | Focus Areas                                                     | Typical Format                              |
|---------------------------|-----------------------------------------------------------------|---------------------------------------------|
| Initial Meeting           | Intake, values clarification, emotional mapping                 | 60–90 min, in person or virtual             |
| Active Support Phase      | Emotional companionship, advocacy, planning                     | Weekly or biweekly visits, 60–90 min        |
| Vigil Planning            | Ritual design, environmental cues, schedule coordination        | 1–2 extended sessions near transition phase |
| Dying Vigil (if included) | Presence during active dying, legacy protection, energy holding | Continuous or rotational presence (as able) |
| Immediate Post-Death      | Early grief support, body honoring, family debrief              | 1–2 visits, 60 min each                     |
| Closure Session           | Final reflection, care transition, emotional integration        | Optional, by mutual agreement               |

Service flow may be paused, expanded, or adapted depending on the Client's experience, medical status, or changes in family dynamics. The Doula and Client will remain in regular communication to adjust the schedule and role as needed.

## 7. Confidentiality, Discretion, and Information Protection

The Doula agrees to maintain strict confidentiality regarding all personal, spiritual, medical, familial, or logistical information disclosed during the course of service. This includes verbal communication, observations made during visits, materials shared by the Client or their representatives, and sensitive topics raised in trust. All conversations are held in a nonjudgmental, sacred container, and will never be repeated, quoted, or summarized outside the direct scope of care.

The Doula will not document or store sensitive information unless explicitly requested to do so by the Client. No personal records will be created or retained unless required for session tracking or payment documentation, and these will be maintained with appropriate discretion. The Doula may discuss their emotional experience of the work in confidential professional supervision spaces, but will never share identifying details. The Client understands that the Doula is not subject to HIPAA protections, but voluntarily operates at a high ethical standard of privacy and personal respect. Any concerns regarding discretion should be brought directly to the Doula and will be addressed with care and immediacy.

## **8. Legal and Clinical Scope of Services**

The Doula's role is intentionally non-medical, non-clinical, and non-legal in nature. Their presence is designed to provide compassionate, values-aligned support before, during, and shortly after death. They do not replace licensed medical care or legal counsel under any circumstance. The Client acknowledges the limitations of the Doula's scope and agrees not to request or expect services that exceed those boundaries.

The Doula will not:

- Provide clinical assessments, physical care, or medication administration
- Participate in medical decision-making or speak on behalf of the Client to providers
- Offer legal advice, prepare legal documents, or act as a witness for estate planning
- Replace hospice or medical team services
- Interpret religious doctrine or provide pastoral counseling unless qualified and requested

The Doula may, at the Client's request, help coordinate conversations with licensed providers, clergy, or attorneys. However, they do so as a supportive presence only, not a representative or intermediary. If the Doula believes they are being placed in a role outside their ethical or professional limits, they reserve the right to pause or withdraw services with appropriate explanation.

## **9. Capacity, Consent, and Voluntary Participation**

This Agreement is entered into voluntarily by the Client or their legally authorized representative. The Client affirms that they are of sound mind, acting with free will, and understand the scope, structure, and intent of this engagement. If the Client is not able to legally consent, the signatory affirms that they have proper authority to enter into agreements on the Client's behalf and will maintain transparency with all involved parties.

All services are non-obligatory and may be modified, paused, or terminated by either party at any time. The Doula may choose to conclude the engagement if circumstances become unsafe, ethically unclear, or if the emotional demands of the relationship exceed what is sustainable within professional boundaries. Similarly, the Client may end this relationship at any point without penalty. No ongoing services, loyalty expectations, or exclusivity arrangements are implied. The Doula will respect any decision to discontinue care and will support a smooth transition if the Client wishes to seek alternative services or request closure.

## **10. Environment, Energy, and Space Holding Boundaries**

The Client understands that the quality of the physical and emotional environment during end-of-life work directly affects the Doula's ability to provide grounded, effective care. The Doula may make respectful requests around space preparation, privacy, and energy maintenance to ensure that visits are conducted in a way that promotes clarity, calm, and comfort for everyone involved. These boundaries are never personal but are part of the Doula's responsibility to maintain an energetically safe container.

The Client agrees to the following:

- Provide a quiet, respectful space for visits free from unnecessary interruptions
- Ensure that visitors, family members, or care staff are informed of Doula presence and role
- Avoid using the Doula for mediation in family disputes unless previously discussed
- Refrain from requesting services outside scheduled times without advance agreement
- Allow the Doula to step away or end a session if the emotional environment becomes destabilizing

If the Client is unable to meet these expectations due to the nature of their care setting or family dynamic, the Doula will collaborate to find a reasonable solution. The Doula reserves the right to decline in-the-moment requests that violate their professional standards or interfere with the intention of the visit.

## **11. Family Dynamics, Grief Presence, and Non-Directive Support**

The Doula understands that death occurs in the context of complex emotional landscapes. Grief, anticipatory loss, spiritual questioning, and relational tension may all emerge in unpredictable ways. The Doula does not serve as a counselor or adjudicator during moments of conflict or emotional escalation. Rather, their role is to serve as a steady presence — offering non-directive support that allows space for all experiences to unfold without judgment or control.

The Doula will not insert themselves into family disputes, inheritance discussions, or disagreements about medical decisions. They will, however, honor all expressed emotions, validate a wide range of grief responses, and maintain neutrality even in the presence of chaos or conflict. If family dynamics interfere with the Client's access to care, the Doula may request a private check-in or postpone future sessions until a safer environment is available. This Agreement does not obligate the Doula to provide ongoing support to family members once the Client has died, though one or two transitional check-ins may be offered at the Doula's discretion.

## **12. After-Death Care Support and Transition Closure**

The Doula's services may continue in a limited capacity following the Client's death, depending on the original scope of agreement. This may include guiding the family through body-honoring rituals, sitting with the deceased for spiritual or cultural reasons, supporting logistical transitions, or providing early-stage grief presence. These services are offered within ethical boundaries and will not overlap with the responsibilities of licensed death care professionals, hospice personnel, or funeral home staff.

If after-death services are desired, this must be discussed in advance and may include a limited number of transitional visits. The Doula will not act as a funeral director, legal next of kin, or ceremonial officiant unless specifically arranged and qualified. The purpose of the Doula's post-death presence is to help ground the family in the immediate moments following death — not to manage ongoing bereavement or estate closure. Families requiring long-term grief support will be referred to appropriate providers or support networks. The Doula will formally close the engagement after the final visit and may offer a brief closure reflection to honor the journey shared.

## **13. Closure of Engagement and Follow-Up Guidelines**

The conclusion of doula services will be marked by a final visit, check-in, or written communication confirming that all requested support has been completed. The Doula will offer the Client or their representative the opportunity to reflect on the process, express final thoughts, and provide feedback if desired. This final interaction serves as a formal closing of the energetic and emotional relationship established during the course of care.

The Doula will not initiate future contact unless specifically requested and will not retain personal information, session notes, or care preferences beyond the timeline needed for administrative closure.

If any materials were created collaboratively during legacy work or vigil planning, these will be returned in full to the Client or family at the final session or within an agreed-upon timeframe. Any remaining payments or invoicing will be completed promptly, and the Doula will confirm that the engagement has been respectfully concluded. The Client is welcome to reach out in the future if they wish to reconnect for ceremonies, grief support referrals, or new services, though no future obligation is implied.

#### 14. Agreement Execution and Confirmation of Consent

By signing below, the Client or their authorized representative confirms that they have read this Agreement in full and understand the purpose, structure, limitations, and boundaries of all services provided. The Doula affirms their commitment to uphold the ethical standards and practices outlined herein, and agrees to provide care with respect, presence, and professionalism at all times. This Agreement becomes effective on the date of final signature and shall remain in place for the duration of the engagement unless revised or terminated by mutual consent.

Client or Authorized Representative Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Doula Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

