

FULL CUSTODY EVALUATION

Dear Family Law Attorney,

This letter outlines the procedures for comprehensive psychological custody evaluations in our office. (See attached checklist.)

Fees

We require a deposit of \$7,500 for comprehensive evaluations. Please call our office for the deposit amount and for our hourly rates. When the deposit is used up, usually at the time the interviews are completed, we will ask for a second deposit before going forward to review materials and write the report. The balance due is payable in the form of a cashier's check before the report is released.

Stipulation and Order

We require the parties and attorneys to sign a stipulation, which then becomes an order of the court, covering issues concerning our fee arrangements, release of confidentiality, immunity, and calling the evaluator as a witness. We can provide a sample stipulation or will also agree to use other stipulations that cover the above issues. There is a due date for receipt of an order naming the evaluator or the conformed stipulation three weeks (21 days) prior to the date of the first appointments so the evaluator can file form FL-326 with the court; if receipt is past the due date, the first day of evaluation sessions may be rescheduled.

Scheduling Appointments

Once the deposit and stipulation/order are received, our office will call the parties to set up their appointments. It is more efficient for the parties to schedule directly than for us to schedule through attorneys' offices. Please instruct them to phone our staff at 310/392-6163.

Informed Consent

During the first evaluation appointment, we ask parties to sign an informed consent regarding evaluation procedures, which we also discuss in person. The parties and their attorneys are provided with the informed consent in advance, for their review.

Materials Submitted

The parties will bring the original and two copies of both the Detailed History Questionnaire and the Collateral Contact List to their first appointment. The evaluator will give the two copies to the other party, usually at the end of the day. The parties are responsible for providing to their attorneys copies of these forms from both parties.

The parties and attorneys may submit any ancillary materials they wish as long as the other party and the other party's counsel is provided copies. Our office is not responsible for ensuring ancillary materials are provided to the other party's counsel during the evaluation. Any materials submitted will be reviewed. Only submit copies of materials that do not need to be returned. Please be aware that review of lengthy documents may substantially increase the cost of the evaluation.

Communication with Attorneys

Any oral discussion of case content with attorneys will be done in the form of a conference call. However, we will discuss procedures (e.g., when is report to be released, arrangement of fees) with attorneys' offices separately.

Length of Evaluation Process and Scheduling

Our goal is to finish the evaluation within twelve weeks of the first appointment. In order to do this, the parties must make themselves available to come to appointments according to a particular schedule.

Although we understand that there are situations in which delays are unavoidable, we ask that you please help your clients understand the importance of adhering to the schedule. Reasons for parties not making themselves available for the schedule of appointment times will be reported to the court.

Referrals for Evaluation Procedures

We use some self-report psychological testing for all evaluations. When there are concerns about parents' psychological functioning, we may refer for more extensive testing to another psychologist, with that psychologist making his or her own arrangements for fees and payment. Home visits may be done because of either party's request or because of our decision that information is needed. A colleague may do the home visits and write a separate report, with payment for that report collected through our office.

Reporting of Results

Usually we provide a detailed report with information collected, analysis of results and recommendations. In some cases, we will give an oral presentation to the parties and their attorneys, along with a short written report that includes conclusions and recommendations. Reports are released on the same day to the court and both attorneys.

Testimony

If we are asked to testify in a deposition or court appearance, we expect a subpoena that makes it clear whether the file or our testimony alone is required. We ask that you make arrangements at least fifteen court days in advance with our office and schedule us to appear for a given day or half-day. We do not make arrangements to be "on call." Our witness fee is payable in the form of a cashier's check one week prior to the appearance. No fees will be refunded for cancellations made less than 48 hours before the scheduled appearance.

We testify as the court's expert, and remain neutral. All communication with attorneys prior to a court hearing about the case will be done in the form of a conference call, except for communication strictly concerning arrangements for testimony.

Security Issues

If there is a restraining order/s in place at the time of the evaluation, please notify our office promptly so we can make appropriate modifications regarding procedures that may bring the parties into contact with one another. Also please notify us if either parent has a concern about possession of guns, fears of child abduction, or any other concerns that may require extra attention to security.

Court Dates

Attorneys are responsible for informing us of the court date for which the report is needed. If we cannot complete the report within the time frame of the given court date, we will contact the attorneys with an expected date of completion.

Please phone our office if you have further questions.

Sincerely,

Mary Elizabeth Lund, Ph.D.

Angus Strachan, Ph.D.

Checklist For Starting A Custody Evaluation With Lund & Strachan

To schedule an appointment, please provide:

- Key contact information
- Initial deposit
- Stipulation signed by both parties and both attorneys

Then we will assign a date for the initial day of appointments.

Complete the Custody Evaluation Questionnaire:

- You may complete it by hand or you can type it.
- If you want to type it, you can ask our staff to send a Word version.
- If you type it, please use double spacing and at least 12-point font.
- Please limit your responses to the space provided. For any one question, try not to add more than one page beyond the space provided.
- All materials must be letter-size.
- Please staple or clip the questionnaires and attachments. Do not put them in binders. Manila or accordion folders are good.

Bring to the initial appointment the original and two copies of:

- The Custody Evaluation Questionnaire
- The Potential Collateral Contact List
- Other materials requested in the questionnaire attached at the end.

(The two copies are for the other parent and their attorney. Make two extra copies for yourself and your attorney.)

Be ready to sign at the initial appointment:

- The informed consent form
- The Custody Release of Information Form

Filing other materials:

- All other materials ('ancillary materials') should be copied to the other party and your attorney (with an extra copy for the other attorney).
- This should be done as soon as possible and no later than six weeks after the initial appointment.

Further deposit requests:

- Expect at least one further deposit request.
- All fees must be paid before the report is released.

