



RULES AND POLICIES FOR PARENTING CONSULTANT (PC) CLIENTS

I consider your children to be the “client”, as it is my job to make decisions based on their best interests pursuant to Minnesota law and my education and experience. I will treat both parents with respect and kindness, but ultimately, my role is to help you help your children by reducing conflict.

OPENING THE FILE AND INITIAL MEETINGS

Upon receiving your signed fee agreement and payment, I will schedule an initial meeting with both parents. This meeting will take place via Zoom and both parents should be present unless there is good cause for holding the meetings separately. This is important, as I need to make sure that both parents receive the same information, and that is more challenging if we are not all together. This initial meeting will be used to go over the fee agreement, policies, and procedures and to answer any questions you may have about the process. We will also discuss your goals for your children and what you are looking to get out of this process.

PROCESS FOR REQUESTING ASSISTANCE

1. **Step One.** Prior to engaging me on a subject, you and your co-parent are required to attempt to reach a decision without my input. This serves dual purposes – it ensures that there is, in fact, a conflict, and it also allows you to identify any areas in which there are agreements and narrow the issues on which you need help. I do not have a required format for this step – you may use text, email, Our Family Wizard, or any other means that work for you. You are on the “honor system”, but in my experience, if a parent attempts to raise an issue without first speaking to the other, it will be brought to my attention by the other parent and used in an attempt to reallocate fees. Reallocation of fees is an extreme step that I do not take lightly, but I do consider it to be an abuse of this process to attempt to circumvent the requirement that you first speak to the other parent about the disagreement and reserve the option to reassess fees accordingly.

An exception to this rule is if there is a legitimate reason to believe that discussing the concern with your co-parent prior to reaching out to me would endanger the child(ren). Examples would be an acute concern that the other parent is experiencing some type of physical or mental health condition that makes them unable to provide

the same level of care, under the influence of mind-altering substances during parenting time, or otherwise unable to provide a safe environment. Please note that contacting me is never the solution in an emergency – if you believe there is an immediate threat to the safety of your children, you should contact the police or call 911. I am able to address modifications of parenting time as a result of an emergent concern, but I do not have the authority nor the ability to remove children from a dangerous situation and any modifications to parenting time will come about as a result of me taking the time to assess both parents' versions of what occurred and any relevant reports or records.

2. **Step 2.** After speaking to each other and identifying that you require assistance from me, the party requesting assistance should email me, copying the other parent, and providing the following information:
 - a. The subject of the disagreement.
 - b. Your proposal for how to address the disagreement (what you want to have happen). This should be no more than one “page” long and should focus **only** on your request – you should not attempt to anticipate what the other parent may say, nor should you assign blame. This should be purely factual and identify why your proposal is in the best interests of the children. You do not need to address every statutory factor, but it is important that you consider how your request will impact your children, not just you and your co-parent.
 - c. A statement that you first attempted to resolve the issue without raising it through this process.
3. **Step 3.** Upon receiving this information, the other parent should, within one week (7 days), respond to me, copying the other parent, and providing their proposal for how to address the agreement. The responding parent should follow the same guidelines as the initial parent. Do not address your co-parent's proposal at this stage.
4. **Step 4.** Within 3 days of the second parent providing their proposal, each party should send me an email, copying the other parent, and providing the following information:
 - a. Any part of the other parent's proposal you can say “yes” to.

- b. For any part of the other parent's proposal with which you disagree, identify why. This portion of your response should be no longer than half a page.
- c. If your co-parent completes this step first, you should **NOT** address their response in yours. You are only to respond to their initial proposal.

5. **Step 5.** After receiving each parent's proposal as well as each parent's response to the other parent, I will review your submissions and, if necessary, send you a list of follow-up questions. If I send you follow-up questions, you will have seven days to respond to me, copying the other parent. I will then get to work gathering information, speaking to any necessary resources, etc.

This process varies in length, depending on the complexity of the issue and the amount of information I need to gather or review. Upon completing my initial review, I will schedule individual meetings with each parent to address any additional questions that may have arisen throughout my review. These individual meetings typically last between 20 minutes and one hour.

6. **Step 6.** After our individual meetings, I will draft my decision. From time-to-time, it may be necessary to have additional meetings with the parents, which I will schedule as soon as practicable. I will do my best to provide you with an accurate estimate of how long the drafting process will take. Once the decision is finalized, I will email both parents a copy.

7. **Note on Timing.** While the deadlines in the above steps are intended to be followed in most situations, I reserve the absolute right to allow a parent "extra" time to respond if I feel the circumstances warrant an extension. Examples include a deadline falling on or near a holiday or illness, though this is not an exhaustive list. Deadline extensions are at my sole discretion.

"COOLING DOWN" PERIOD

8. PC work is, by its nature, an adversarial process; you have hired me as you, as the parents or guardians, are unable to reach agreements on your own. As a result of each issue you raise with me, I will be making a decision that one, or both, of you may disagree with. Because of this, I require that after providing you with my decision, you wait 48 hours prior to contacting me. This "cooling-off" period serves several purposes.

- a. First, it requires that you read, and then re-read, the decision. It is human nature to skim a document on first viewing in order to identify the "final result", which in this case, are my decisions and recommendations.

However, each decision I write will include detailed information on how I reached the decision, any sources or collateral individuals with whom I spoke or documents I reviewed, any research I conducted, and, when appropriate, an analysis of my decision based on the best-interest factors of Minnesota Stat. §518.17. The amount of information I provide will almost always require a rereading to process.

I do not say this out of ego – my goal in issuing decisions is to provide enough information that it is clear what facts I considered and how I reached my decision, not only so that you, as the parents, understand, but also so that should either parent decide to appeal to the District Court, the judicial officer will have a full record of the work I did on an issue and the basis for my decision.

- b. In my experience, a parent's initial response will be motivated by emotion, particularly if that parent feels that my decision is in favor of the other parent. While emotion is unavoidable, it can cloud our ability to process information. It is not a productive use of your time and money to get on the phone immediately after receiving a decision and tell me how I got it wrong.

Instead, I ask that you write down, in an email, any facts that you believe are inaccurate and your basis for believing so, and then send that to me, copying your co-parent, after the 48 hours have elapsed. This allows you to focus your thoughts and it will allow me to answer any questions you may have, as without knowing specifically what you believe is incorrect, I cannot adequately address your concerns.

Any calls or emails prior to the 48-hour mark will not be answered, and in general, phone calls are not accepted, as explained later in this document.

RECONSIDERATION OF DECISIONS

- 9. In general, my decisions are final. This is because your children deserve to not be held in limbo as we rehash the issues, and because if my decisions were not final, the cost to you and your co-parent could quickly become prohibitive as you each request that I reconsider any decision with which you disagree. The only exceptions

are mistakes of actual fact or omissions that make the decision unable to be implemented. An example of a mistake of fact would be that you have asked me to make a school choice and it later becomes clear that there are two "Oakridge Academies" and I have researched the wrong one. An example of an omission that would make the decision unable to be implemented would be that I have not provided information regarding which parent is responsible for transportation to an activity.

COMMUNICATION POLICY

10. Communication with me will be via e-mail only unless otherwise agreed to in advance. This affords transparency as it allows us to have a record of our communication. Your co-parent should be copied on any communications to me, and I will copy both parents when communicating with either.

PARENTING PHILOSOPHY

11. I recognize that not every set of parents will be able to co-parent peacefully, and that "parallel parenting" may be necessary in some situations. My goal is to decrease the amount of tension to which your children are exposed. As such, while I will attempt to help you communicate more effectively with the other parent and am happy to work as hard as you, the parents, desire to improve your co-parenting relationship, we may reach a point where joint meetings are not productive. If there is a history of domestic abuse, separate meetings will be the default unless otherwise requested by the parent who experienced the abuse.

INTERVIEWING YOUR CHILDREN

12. In some situations, it may be appropriate for me to speak with your children regarding an issue. Whether or not such an interview is necessary is based solely on my own discretion, which is in turn based on my experience and education. Consulting with your children is not the default – rather, this is reserved for issues where your children's preferences are important to know and are not easily discernable through other means.

Examples of times I may speak to your children include, but are not limited to: making a decision on which activities a child will participate in, modifications of the parenting time schedule, or school choice. In general, I do not interview children who are very young or who have historically been over-involved in parental conflict. If I do speak with your children, I will ask them open-ended questions and I will

emphasize that they are not being asked to make the decision. I will also assure them that I will not disclose information provided by them beyond indicating that I have spoken with them and, if appropriate, disclosing what their preferences would be. My goal is to shield your children from adult conflict as much as possible while also giving them a chance for their voice to be heard.

MEETING POLICY

13. Unless otherwise agreed in advance, all meetings will be held virtually. You should attend these meetings in a quiet area where you are alone and unlikely to be interrupted. No third parties, such as partners or family members, are allowed to attend meetings unless otherwise agreed in advance. If, at any time, your children or another third party enter the room, I will pause our meeting until you are alone. You should not be driving or otherwise distracted when meeting with me.

DIVERSITY POLICY/STANCE ON CERTAIN ISSUES

14. I recognize that there is substantial disagreement in society regarding issues such as gender, race, weight, intelligence, religion, and sexual preference. While I will not attempt to force my views on a parent, it is important for parents to know that, above all, my priority is to respect your children and not cause them harm. Therefore, there are certain actions that I will not undertake.

For example, if a child has expressed a preference to use a nickname, a different pronoun, etc., I will honor that request in speaking to and about that child.

I will not make decisions pertaining to whether a parent can require that teachers, peers, etc., refer to their child using language that goes against the child's reasonable preferences when doing so is likely to cause a child distress. For example, if your child states that they are nonbinary, I will not accept for consideration requests that require the other parent to use terminology or names which go against the child's reasonable preferences. Similarly, I will not help parents impose rules that are, in my education, experience, and belief, harmful – for example, I will not issue a decision requiring that the other parent not introduce a new partner because the requesting parent is opposed to interracial relationships, same-sex relationships, living together prior to marriage, etc.

I believe in evidence-based practices and will not prevent a parent from seeking mental-health treatment for their child simply because the other parent does not "believe" in therapy. Similarly, I will typically endorse children receiving routine

childhood immunizations. I will not endorse sending children to “wilderness camps” for behavioral corrections or conversion therapy. If a child has the ability to articulate a reasonable disagreement with participating in the religious practices of their parent, I will not issue a decision that forces that child to continue religious observance when doing so poses a risk to the well-being of the child.

If at any time I believe that the potential consequences of a decision pose a substantial threat to the mental or physical safety of your child, I reserve the right to refuse the issue for consideration.

YOUR SIGNATURES ON THIS DOCUMENT INDICATE THAT YOU HAVE READ AND UNDERSTAND MY POLICIES AND ARE IN AGREEMENT TO PROCEED WITH ME AS YOUR PC.

Parent 1 Signature

Date

Parent 2 Signature

Date

PC Signature

Date