

## TERMS OF ENGAGEMENT

Appointment of **Graham Greatrix** of Accident Consultants as Expert in the matter of

.....

Agreement made this .....day of ..... 20.....

between .....

(hereinafter called the Appointor) and Mr Graham Greatrix (hereinafter called the Expert).

As witness the hands of the parties

I am duly authorised to sign this contract for and on behalf of

(firm's name) .....

Signature of Appointor .....

Signature of the Expert .....

This agreement has three pages.

### (1) Appointment

The Expert has been appointed to render advice and services in accordance with these Terms of Engagement.

### (2) Definitions

Unless the context requires otherwise:

- (a) 'Appointor' means the solicitor or agent instructing the Expert.
- (b) 'Expert' means the person appointed to provide advice and services which may include the giving of expert evidence.
- (c) 'Client' means the person(s), firm, company or public body on whose behalf the Expert is being instructed.
- (d) 'Assignment' means the matter(s) referred to the Expert for advice to which these Terms of Engagement apply.
- (e) 'Fees' means (in the absence of written agreement to the contrary) the reasonable charges of the Expert based on his normal hourly rate for work of the type instructed and including VAT where applicable.
- (f) 'Disbursements' mean all reasonable and appropriate costs and out-of-pocket expenses incurred by the Expert in carrying out the Assignment, including travel and, should an overnight stay become necessary, hotel accommodation.

### (3) The Instructions

The Appointor will:

- (a) provide the Expert with full and timely written instructions which clearly state:
  - (i) whether the Expert is being instructed on the Appointor's own behalf or that of one of the parties to the dispute or as a Single Joint Expert pursuant to Civil Procedure Rule 35.7.
  - (ii) the purpose for which the Expert's advice and services are needed, including a description of the matter on which the advice and services are being sought.
  - (iii) which factual aspects of the matter may be in dispute.
  - (iv) whether the advice and services are to be provided in accordance solely with the information supplied or will require independent investigations by the Expert.
  - (v) the precise kind of expertise called for
  - (vi) the particular questions that are to be addressed
  - (vii) whether the Expert will be expected to confer with experts instructed on behalf of other parties with a view to reaching agreement on the issues or narrowing those in dispute.
  - (viii) whether the Expert is to prepare a report for the advice of the Appointor and/or his Client or for use in Court, and, if the latter, whether a draft version needs to be submitted first of all
  - (ix) any time constraints for the provision of the advice, the production of the report, etc.
- (b) provide the Expert with such basic additional information as names, addresses, telephone numbers, email addresses, dates of incidents and place of incidents.
- (c) supply the Expert with good-quality copies of all the relevant documents.

#### 4 Obligations of the Appointor

The Appointor will:

- (a) inform the Expert by whom his fees are to be paid and whether the Appointor needs to obtain authority to incur the estimated fees and disbursements before confirming the Expert's instructions.
- (b) In legal cases:
  - (i) notify the Expert that a funding certificate or legal aid order has been applied for, granted or amended
  - (ii) apply to the Area Office of the Legal Services Commission for prior authority to incur the Expert's anticipated fees and disbursements and immediately advise the Expert should this authority be refused or changed
  - (iii) apply to the Area Office for interim payments on account to settle the Expert's invoices within the agreed time scale.
- (c) in privately funded cases ensure that the Expert's fees and disbursements are paid within the agreed time scale, whether or not the Appointor has been placed in funds by the Client.
- (d) respond promptly to any reasonable request from the Expert for:
  - (i) clarification of instructions already given
  - (ii) further information or documents
  - (iii) permission to incur expenses additional to that initially estimated
  - (iv) authority to engage others to undertake part of the Assignment
- (e) not alter, or allow others to alter, the text of the Expert's report(s) in any way without the Expert's permission.
- (f) give prompt written warning of every meeting or hearing that the Expert is, or may be, required to attend and immediate notification should they be cancelled.
- (g) keep the Expert informed as to the progress of the case and its outcome.
- (h) not use, or allow others to use, the Expert's report(s) for any purposes other than litigation in the matter on the Appointor has sought the Expert's advice and services.

The Appointor's instructions are accepted by the Expert only upon the basis that the Appointor gives the Expert full, timely and proper instructions, authority and information which will enable the Expert to lawfully and properly carry out the assignment and comply with the Expert's duty to the Court and that the Appointor will indemnify the Expert accordingly.

#### 5 Obligations of the Expert

If the Expert is required to provide expert evidence, he becomes subject to the provisions of the Civil or Criminal Procedure Rules that relate to experts. In such circumstances the Expert's primary duty would be to the Court and his evidence must be seen to be independent, objective and having no bias towards the party responsible for paying his fees. Subject to these overriding considerations, the Expert will:

- (a) at all times, both during and after completion of the Assignment, adhere to professional boundaries of confidentiality, and raise with the Appointor any conflict between professional boundaries and Appointor instructions, if it becomes apparent.
- (b) perform only those tasks for which he has the requisite qualifications and experience to undertake, and the resources needed to adequately fulfil them within the allotted time span.
- (c) keep detailed records of tasks undertaken.
- (d) promptly notify the Appointor of:
  - (i) any conflict of interest that would disqualify the Expert or render it undesirable for the Expert to have continued involvement with the case
  - (ii) any requirement the Expert perceives for the Appointor to employ additional expertise.
- (e) endeavour to make him available for all hearings, meetings or other necessary engagements for which he has received adequate notice.
- (f) not negotiate with the opposing party or their advisers unless specifically authorised to do so by order of the Court.
- (g) if requested by the Appointor, provide before the hearing full and complete details of his costs to trial.
- (h) not without good cause discharge himself from the appointment as Expert.
- (i) at all times. Both during and after completion of the Assignment, treat all aspects of it as confidential unless authorised by the Appointor to the contrary.

#### 6 Intellectual Property Rights

- (a) Unless otherwise agreed in writing, all legal and beneficial interest in intellectual property rights and rights of ownership in written reports, photographs, recordings, models and other original work created by the Expert relating to or developed by him in connection with the assignment given by the Appointor shall belong to the Expert.
- (b) The Expert grants to the Appointor a non-exclusive, non-transferable licence to use the said intellectual property solely in connection with the Assignment to which the instructions relate and for the duration of these terms of engagement but subject to clause 7(f) below.

## 7 Fees and Disbursements

In the absence of any written agreement to the contrary:

- (a) the Appointor who instructs the Expert does so as principal and shall be personally responsible for payment of the Expert's fees and disbursements, whether or not the Appointor has been placed in funds by the Client or by the Legal Services Commission and the Appointor shall pay them in full, notwithstanding any provisions of the Civil or Criminal procedure Rules with regard to their amount, recoverability or otherwise, and whether or not the full amount has been allowed in any assessment of the costs of the case.
- (b) Fees will be charged on a time costed basis at the Expert's hourly rate from time to time applicable and notified in writing by the Expert to the Appointor unless a fixed fee or some other basis of charging has been agreed in advance and in writing between the Expert and the Appointor.
- (c) The Expert may present interim invoices at such intervals as he considers fit and payment of each invoice will be due within two months of its presentation, subject to any written waiver granted by the Expert in legally aided cases.
- (d) The Expert reserves the right to charge to the Appointor the costs and expenses (including legal costs) of recovering late payments and to charge interest at the rate then in force pursuant to the Lat Payment of Commercial Debts (Interest) Act 1998.
- (e) If the Appointor does not make payment when due the Expert may, in addition, modify the payment terms so as to make all fees and disbursements payable in advance or require the Appointor to give such assurance, guarantee or undertaking as the Expert may reasonably require to secure the Appointor's payment obligations.
- (f) Until payment in full has been made by the Appointor the Expert shall be entitled to retain all books, papers, reports, documents and other materials, whether or not these are the property of the Appointor and whether or not they relate to the assignment in respect of which the Expert has been instructed.

## 8 Cancellation Fees

The expert shall be entitled to charge fees whenever:

- (a) the Expert's time has been reserved for a specific hearing, meeting or other engagement, or
- (b) specific instructions have been given to the Expert for an investigation and report and due settlement of the matter, or for any other reason not the fault of the Expert, the reservation of time has been cancelled or the instructions withdrawn.

These fees will be calculated according to the following sliding scale based on the number of days to the hearing or to the date arranged for the completion of the report or of the investigation

Cancellation or withdrawal of instructions	Percentage of agreed fee
within 14 days	30
within 7 days	50
within 1 day	75

## 9 Disputed Fees

In the event of a dispute over the amount of the Expert's fees or disbursements, such sums that are not disputed shall be payable when due irrespective of any counterclaim that may be alleged. That part which is in dispute can then be referred for resolution to a mediator acceptable to both parties or, if agreement cannot be reached, by using the services of the Centre for Dispute Resolution. In the event that the dispute is not resolved by means of negotiation or mediation, the Courts of England, Wales and Scotland have exclusive jurisdiction in relation to the dispute and its resolution.

## 10 Third Parties

These terms of engagement set out the rights and obligations of the Appointor and the Expert only. For the purposes of the Contracts (Rights of Third Parties) Act 1999, nothing in these terms shall be taken to confer or purport to confer any right or benefit on any third party and a third party shall have no rights to the enforcement of any term contained herein.