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# The Consulting Agreement

The consulting agreement summarizes the work to be performed by SMR consultants, the responsibilities of various parties, fees and other conditions. The following elements are contained in the consulting agreement:

#### 1. Overview of Problems/Needs

#### 2. Definition of Consultant Services to Be Provided

- Specific deliverables
- Methodologies to be employed
- Work plan with timetable

#### 3. Responsibilities of Client

- Designation of 'primary client'
- Designation of 'primary contact'
- Responsibilities of client (i.e., provision of data, availability for meetings, etc.)

#### 4. Consultant(s) to Be Assigned to Project

- Designation of principal consultant
- Process by which secondary (non-SMR) consultants would be approved if necessary

#### 5. Terms of the Agreement

- Billing Information
- Estimated hours usually a range that includes travel time, telephone calls and meeting preparation
- Hourly rate, flat rate or retainer depending on agreed upon fee
- Estimated total fees
- Out-of-pocket expenses

• Billing terms – invoice schedule

## 6. Other Conditions of the Agreement

- Confidentiality/anonymity
- Who and how information will be shared
- · Access to information and individuals
- Termination by mutual agreement or other terms

## 7. Evaluation of the consulting engagement and working relationship

• Review effectiveness of recommended interventions at date subsequent to end of agreement

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