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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
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- 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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