

GUIDANCE NOTES
Completing the Case Plan, Stage Plan and Task List

The following guidance is to help assist in completing the Case Plan, Stage Plan and Task List.

The Case Plan

This should encompass details of the case, the defence team and information on the category of the case. It is important to follow the structure of the template but avoid going into too much detail. A Case Plan must be regularly amended to reflect developments and update assumptions.

The Stage Plan

The Stage Plan consists of two parts, the overall Stage Plan and the Task List. The Stage Plan should be more detailed than the Case Plan and should accurately set out the tasks to be undertaken over the next stage to support the request for hours set out in the task list. The Stage Plan should give a general description of the work undertaken to date and the key areas of work that the different members of the defence team will need to conduct over the next three months.

The Task List

- The Task List requires you to identify the work expected to be undertaken in the stage by all members of the defence team. You do not need to provide a detailed description of the task but you must provide sufficient information for us to know what work is to be carried out i.e. reading 250 pages co- defendants interview, or instructing counsel to advise on need for forensic accountant, or attending mention on a specific date.
- You must specify which grade of fee earner will be carrying out the task and the estimated length of time for the particular task.
- If there are to be two fee earners working on the same task then you must state how the task is to be split between them.
- As guidance, a maximum allowance equivalent to 1 hr per week at Grade B is generally given on all cases to cover routine telephone calls and letters.
- All stages are 12 weeks unless agreed otherwise (imminent hearings, key events etc)
- The Case plan, Stage Plan and Task List, should be sent to us **at least 3** working days in advance of the initial meeting to ensure that we have time to consider the proposals. All subsequent Stage Plans and Task Lists should be also sent to us at least 3 working days before the stage review meeting.
- The Unit prefers joint plans from Counsel and Solicitors. If problems occur in this happening a plan from Counsel and Solicitor must at the very least reach us at the same time.
- If you request a particular amount of time and realise shortly after the commencement of the task that you may need further time, you must contact us prior to the time agreed being reached and request further time, setting out the reasons why the task is taking longer than originally thought and outlining unforeseen complexities. Only time agreed for in advance can be paid.
- At the end of the stage please ensure that you insert into the task list the actual time spent on the task against the agreed allowance.