

HCF – Fully Costed Family Case Plan – 1 Counsel April 2013 v2

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| **Version:** | **Issue date:** | **Last review date:** | **Owned by:** |
| 2 | 01/06/2022 | 01/04/2013 | High Cost Family Team |

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| --- | --- | --- |
| **Version:** | **Date** | **Reason** |
| 1 | 01/04/2013 | First release - Legal Aid Reform and transition to Legal Aid Agency |
| 2 | 01/06/2022 | Updated to reflect team name and branding |

**Version History**

**Contents**

1. Overview
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# Overview

This is the standard template case plan for High Cost Family cases managed in South Tyneside under the provisions of the ‘HCF – Family Cases Information Pack’ which is available from our website.

Please consult this information pack for guidance on how this case plan should be completed.

# The Case Plan

The case plan continues on the next page:

# CASE PLAN (FAMILY)

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| **DATE OF CASE PLAN: -** | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | |  | | | |  | |  | | |  | | | |  | | |  | | | | | | | | | | |  | | | | | | | | |
| **HIGH COST REGISTRATION DATE: -** | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | |  | | | |  | |  | | |  | | | |  | | |  | | | | | | | | | | |  | | | | | | | | |
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| **NAME OF CLIENT(S)** | | | | | | | | | | | | | | | | | | | | | | | |  | | | **NAME OF FIRM** | | | | | | | | | | | | | | | |  | | | |  | | | **NATURE OF PROCEEDINGS** | | | | | | | | | | | | | | | | | | |  | | | | | | | | | |
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| **CASE INFORMATION** | | | | | | | | | | | | | | | | | | | | | |  | |  | | |  | | | | | | |  | | | |  | |  | | |  | | | |  | | |  | | | | |  | | |  | | |  | | |  | | |  | |  | | | | | | | | | |
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| **A. Summary of Case** (*Cont)* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Number of Hearings** | | | | | | | | | | | | | | | | | | | | |  | | | |  | | | | | | **HEARING TYPE** | | | | | | | | **DATE** | | | | |  | | | | **HEARING TYPE** | | | | | | | | **DATE** | | | | | |  | | |
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| **& Advocates Meetings** | | | | | | | | | | | | | | | | | | | | |  | |  | |  | | | | | |  | | | | | | | |  | | | | |  | | | |  | | | | | | | |  | | | | | |  | | |
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| **B. Objectives** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **C. Case Analysis**  **The Legal Issues are;**  **The favourable facts are;**  **The unfavourable facts are;** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **D. Funding Code Assessment -** *Not required in public law Children Act proceedings but to be completed in full in private law and money cases* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **E. Case Theory** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **CASE ACTIVITIES AND COSTS INFORMATION:** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | | |
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| **Part 1 - Costs To-Date (pre contract costs) –**  *1. Has the client been represented by a previous firm in these proceedings?*  *2. If yes, are the costs of the previous firm included below?*  *3. If a previous firm has had conduct did they obtain a high cost contract?* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | |
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| **WORK** | | | | | | | | | | | | | | | | | **COSTS (all figures exclusive of VAT)** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | |
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| *Provide Justification here for* ***ANY*** *enhancement applied: -* | | | | | | | | | | | | | | | | | **Profit Costs** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | |
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|  | | | | | | | | | | | | | | | | | **Activity** | | | | | | | | | | | | **Number of hours/items** | | | | | | **Prescribed Rate Applied** | | | | | | | | | | | | | **Enhancement Applied** | | | | | | | | **Total cost** | | | | | | | | | | | | | | | | | | | | | # | |
| **Preparation/Attendances** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Telephone Calls** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Letters Written** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Letters Received** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Conf/Hearings with Counsel** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Travel Waiting** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Advocacy** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| ***Have you submitted a CIVCLAIM 1 for pre-contract costs?*** | | | | | | | | | | | | | | | | | | **TOTAL PROFIT COSTS** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **YES / NO**   |  | | --- | |  | | | | | | | | | | | | | | | | | | | **COUNSEL’S FEES** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **DISBURSEMENTS** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
|  | | | | | | | | | | | |  | | | | | | **TOTAL COSTS TO DATE** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | |  | |
| **CASE ACTIVITIES AND COSTS INFORMATION:** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | | |
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| **Part 1b - Costs To-Date (pre contract costs) –** *IMPORTANT!! this is only necessary if you have attended in two different courts and therefore two different prescribed rates have been applied.* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | |
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| **WORK** | | | | | | | | | | | | | | | | | **COSTS (all figures exclusive of VAT)** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | |
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| *Provide Justification here for* ***ANY*** *enhancement applied: -* | | | | | | | | | | | | | | | | | **Profit Costs** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | # | |
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|  | | | | | | | | | | | | | | | | | **Activity** | | | | | | | | | | | | **Number of hours/items** | | | | | | **Prescribed Rate Applied** | | | | | | | | | | | | | **Enhancement Applied** | | | | | | | | **Total cost** | | | | | | | | | | | | | | | | | | | | | # | |
| **Preparation/Attendances** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Telephone Calls** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Letters Written** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Routine Letters Received** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Conf/Hearings with Counsel** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Travel Waiting** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **Advocacy** | | | | | | | | | | | |  | | | | | |  | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| ***Have you submitted a CIVCLAIM 1 for pre-contract costs?*** | | | | | | | | | | | | | | | | | | **TOTAL PROFIT COSTS** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **YES / NO**   |  | | --- | |  | | | | | | | | | | | | | | | | | | | **COUNSEL’S FEES** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
| **DISBURSEMENTS** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | # | |
|  | | | | | | | | | | | |  | | | | | | **TOTAL COSTS TO DATE** | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | |  | |
| **Part 2 - Future Overall & Staged Costs – all figures exclusive of VAT** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **KEY EVENTS & DATES** | | | | | | | | | | | | | | | **WORK** | | | | | | | | | **TIME ESTIMATE IN HOURS** | | | | | | | | | | | | | | | **SOLICITOR COSTS** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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|  | | | | | | | | | | | | | | | *The outstanding work is identified as follows (detail individual activities)* | | | | | | | | | *Estimated Solicitor Hours* | | | | | | *Please provide estimates for counsel's fees under FGF/FAS scheme for each hearing or event, if this case escapes the FGF/FAS scheme please attach a full breakdown of counsel's fees.* | | | | | | | | | *Please provide estimates of any disbursements to be incurred. Please also indicate how these are to be apportioned.* | | | | | | | | | | *(In respect of profit costs the prescribed rate and the enhancement (if any) applied to each activity – in respect of counsel’s fee the graduated fee for each function but please provide separately a CIVCLAIM5 showing how the fee has been calculated)* | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **KEY EVENTS & DATES** | **WORK** | **TIME ESTIMATE IN HOURS** | | **SOLICITOR COSTS** | | | |
|
| **STAGE ONE (Cont..)** | | **SOLICITOR** | **COUNSEL** | **DISBURSEMENTS** | **Rates Applied** | | |
|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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| **KEY EVENTS & DATES** | **WORK** | **TIME ESTIMATE IN HOURS** | | **SOLICITOR COSTS** | | | |
|
| **STAGE ONE (Cont..)** | | **SOLICITOR** | **COUNSEL** | **DISBURSEMENTS** | **Rates Applied** | | |
|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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| Number of hearings and advocates meetings |  |

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| **KEY EVENTS & DATES** | **WORK** | **TIME ESTIMATE IN HOURS** | | **SOLICITOR COSTS** | | | |
|
| **STAGE TWO** | | **SOLICITOR** | **COUNSEL** | **DISBURSEMENTS** | **Rates Applied** | | |
|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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| **KEY EVENTS & DATES** | **WORK** | **TIME ESTIMATE IN HOURS** | | **SOLICITOR COSTS** | | | |
|
| **STAGE TWO (Cont..)** | | **SOLICITOR** | **COUNSEL** | **DISBURSEMENTS** | **Rates Applied** | | |
|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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| **KEY EVENTS & DATES** | **WORK** | **TIME ESTIMATE IN HOURS** | | **SOLICITOR COSTS** | | | |
|
| **STAGE TWO (Cont..)** | | **SOLICITOR** | **COUNSEL** | **DISBURSEMENTS** | **Rates Applied** | | |
|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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|  |  |  |  |  | ***Rates*** | ***Enh (%)*** | ***Total*** |
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| Number of hearings and advocates meetings |  |

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| |  | | --- | | **Part 3 Costs Summary** | | | | | | |
|
|  |  |  |  |  |
|  | **Profit Costs** | **Counsel’s Fees** | **Disbursements** | **Total** |
|
| Pre-contract costs |  |  |  |  |
| Stage One costs |  |  |  |  |
| Stage Two costs |  |  |  |  |
| Stage Three costs |  |  |  |  |
| Stage Four costs |  |  |  |  |
|  |  |  |  |  |
| **TOTAL** |  |  |  |  |
|  |  |  |  |  |
| **CASE MANAGEMENT INFORMATION** | | | | |
| **I. Team Personnel (including Solicitors Employees, Experts and Counsel and/or Solicitor Advocate)** | | | | |
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| **I confirm that a copy of this case plan has been sent to the client/Guardian ad Litem. ……………………………………………** | | | | |
| *Please complete Appendix 1 to show the hourly rates of all experts and counsel instructed.* | | | |  |

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| --- | --- | --- | --- |
| **APPENDIX 1 - Expert Fees & Counsel Fees** | | | |
| **Experts Fees subject to VAT** | **Hourly Rate** | **Net** | **VAT** |
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| **Sub Total** |  |  |  |
| **Expert Fees not subject to VAT** |  |  |  |
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| **Sub Total** |  |  |  |
| **Grand Total** |  |  |  |
|  | | | |
|  | | | |
| **Counsel's Hourly Rate (if appropriate)** |  |  |  |

**Please submit disbursement vouchers and counsel’s fees notes when billing.**