

Working in Practice The Letter of Engagement

A letter of engagement is part of a practitioner's duty of care to the client. The letter must be clear and concise, and an example is included on this website.

The letter needs to outline

- The responsibilities of the client to supply information and details when required.
- The responsibilities of the practitioner in relation to the work that is carried out on the client's behalf.
- The work that will be done by the practitioner for the client, specifying the total scope of the work, and any special or unusual work undertaken.
- The basis upon which fees will be charged.

The letter should be part of the normal running of a practice. It should be refreshed for all existing clients either, annually or, where significant changes have been made to the work being undertaken which require a new agreement to be established.

New clients should be taken through any agreement before signing. The letter of engagement should cover general work done and any specific requirements for that client.

The letter should never promise work or outcomes that are not within the practice's capability to deliver.

In addition to the above the following may also be appropriate to include

- The qualifications of the practitioners
- Confidentiality of information
- Copyright, patents and royalties
- The arrangements in place for continuity
- The practitioner's approach to running the practice and managing clients.

The Letter of Engagement must be practice specific, and appropriate to the client in question.