



APPENDIX B

Task-Based Billing and Budgeting Formats and Worksheets

The instructions, formats and worksheets in this Appendix constitute a self-contained kit for preparing task-based budgets and bills utilizing the ABA/ACCA task codes. Unless advised otherwise by Stevens' key internal client for a matter, the task-based budget and billing methodology illustrated in this Appendix should be used to budget and bill all significant matters. The following paragraphs describe the forms and requirements that should be followed:

Task-Based Budget

Appendix B-1 is a hypothetical budget for the early phases of a commercial litigation. The only information that Stevens and outside counsel have to agree upon in order to develop a task-based budget is the information in the shaded areas of the worksheet (i.e. the timekeepers who would work on the matter, the applicable net hourly rates, the number of hours that each timekeeper will spend per task requiring work during the designated budget period and appropriate expenses).

Billing Summary Sheet

Appendix B-2 is a sample billing summary sheet for the first month of work under the preceding hypothetical litigation budget. Again, the shaded areas indicate the only data that the law firm needs to include on the billing summary sheet - although the remaining data could be easily calculated and included, if desired, based upon billed hours and the net hourly billing rates of the various timekeepers. *Billing summary sheets arranging the key billing data in a format substantially similar to the format shown in Appendix B-2, applying the net rates for the budgeted timekeepers and tasks, must be attached to each bill submitted to Stevens for all matters covered by a task-based budget.* Law firms should also submit all customary billing statements and detail in addition to the billing summary sheet, unless instructed otherwise by key internal client.

APPENDIX B-1

Litigation Budget

CASE NAME:	
Court and Number	
Law Firm	
Lead Attorney (Timekeeper)	
Telephone Number	
Fax Number	
Email	

Timekeepers

Name	Position	Rate

Litigation Budget

		Estimated Hours	Budgeted
1	Investigation		
2	Pleadings		
3	Motions		
4	Discovery		
5	Settlement & Court Ordered Conferences		
6	Pre-trial Activity		
7	Expert Witnesses		
8	Trial		
9	Post Trial Motions		
10	Appeal		
	TOTAL		

Litigation Code Set (UTB)

L100 **Case Assessment, Development and Administration**

L110 Fact Investigation/Development

L120 Analysis/Strategy

L130 Experts/Consultants

L140 Document/File Management

L150 Budgeting

L160 Settlement/Non-Binding ADR

L190 Other Case Assessment, Development and Administration

L200 **Pre-Trial Pleadings and Motions**

L210 Pleadings

L220 Preliminary Injunctions/Provisional Remedies

L230 Court Mandated Conferences

L240 Dispositive Motions

L250 Other Written Motions and Submissions

L260 Class Action Certification and Notice

L300 Discovery

L310 Written Discovery

L320 Document Production

L330 Depositions

L340 Expert Discovery

L350 Discovery Motions

L390 Other Discovery

L400 Trial Preparation and Trial

L410 Fact Witnesses

L420 Expert Witnesses

L430 Written Motions and Submissions

L440 Other Trial Preparation and Support

L450 Trial and Hearing Attendance

L460 Post-Trial Motions and Submissions

L470 Enforcement

L500 Appeal

L510 Appellate Motions and Submissions

L520 Appellate Briefs

L530 Oral Argument

E100 Expenses (Itemize)

TOTAL

APPENDIX B-2

Billing Summary Sheet Budget

						Total (\$)	
Invoice No.	Matter	Internal Client	UTB Code	UTB Desc.	Hours total	Hours \$	Disbursements
50604	[name]	[name]	L100		xx	\$xx	\$xx