MANCHESTER DISTRICT REGISTRY AND MANCHESTER COUNTY COURT

JSM OUTCOME MONITORING REPORT

This form is to be completed by solicitors with conduct of the case on behalf of Claimant(s) and Defendant(s) after participating in a Joint Settlement Meeting, (JSM) which has been ordered by the Court.

On completion, this form should be returned to the Court **in duplicate**.

……………………………………………………………………………………..

Case Number   …………………..

Name of Case. Claimant(s) ……………………………………………………………….

Defendant(s)…………………………………………………………………

Which Party did you represent?   Claimant(s) …….   Defendant(s) ………..

Approximate value of the Claim, (as Claimed at time of order for JSM) (please tick)
- ❑ £100,000 to £250,000
- ❑ £250,000 to £500,000
- ❑ £500,000 to £1,000,000
- ❑ £1,000,000 to £2,000,000
- ❑ £2,000,000 to £3,000,000
- ❑ £3,000,000 to £5,000,000
- ❑ over £5,000, 000

Did the JSM take place?   Yes ………….   No   ……….

If No, why did it not take place?   ………………………………………...

Did the JSM take place in compliance with the Code of Best Practice? Please mark below by **Y** or **N**.

	ITEM	Comply ? Y/N or N/A
1	The parties are encouraged to agree the most convenient venue for the Joint Settlement Meeting (JSM). In default of any agreement the venue for the JSM shall be the Claimant's Counsel's Chambers or Solicitor's office. The facilities for the JSM shall consist of a suitable room for each party and a separate suitable room for negotiation. Appropriate refreshments should be provided.	

	ITEM	Comply ? Y/N or N/A
2	If any expert is to attend notice should be given 14 days before JSM together with the reason.	
3	An Index of Disclosed Reports and Documents should be delivered by the Claimant's solicitor at least 7 days before the JSM.	
3A	Bundles of Reports and Documents to be prepared(Option).	
4	Schedule (giving at least an outline of the amounts claimed) delivered at least 7 days before the JSM.	
5	List of persons attending on behalf of each party exchanged at least 7 days before JSM. Decision makers for each party with authority to enter into a compromise shall be identified on the lists. In the case of a party under a disability attendance should include the adviser whose advice will be put before the court on approval.	
6	Notice must be given at least 4 days before the JSM if a party wishes a structured settlement to be discussed. The notice should state: (a) whether the structured settlement is to be top down or bottom up (b) the period over which any annuities to be discussed are open for acceptance (c) the Life Offices offering the annuities (if Life Offices are involved)	
7	Counterschedule (giving at least an outline of the Defendant's case) delivered at least 3 days before the JSM. The details of CRU Benefits must be sent to the Claimant by the Defendant with the Counterschedule.	
8	In default of agreement the negotiations will be conducted Counsel to Counsel (if involved) or by Solicitors (if no Counsel is involved)	
8A	▪ Agenda (optional) ▪ Prescribed Negotiating Format (Optional)	
9	In a multi-defendant action the defendants shall be in a position prior to their meeting with the claimant to make a unified offer to the claimant (preferably by holding an earlier separate meeting between defendants)	
10	At the conclusion of the JSM the parties' representatives should sign a Heads of Agreement incorporating the terms agreed which should include dates by which any payment is to be made.	

Did any failure to comply with the Code of Practice cause a significant problem? (Please give brief details)

……………………………………………………………………

Did any compliance with the Code of Best Practice cause a significant problem? (Please give brief details)

……………………………………………………………

Please set out any items that you feel could/should have been have dispensed with.

……………………………………………………………………….

Please set out any other items that you feel would have been of assistance to a constructive JSM?

…………………………………………………………

At what stage in the litigation did the JSM take place? (approximately how long before trial and/or how long after exchange of evidence) …………………….

…………………………………………………………………..

In your view, did the timing of the JSM turn out to be appropriate to the case?   Yes/No

How could the timing have been improved? ……………………………………..

………………………………………………………………………………

Did the JSM achieve: -
a)   Global Settlement of the Claim?   Yes/No
b)   Settlement of Any specific Items?   Yes/No

What was the approximate cost to your party of taking part in the JSM £………..

Did you regard the JSM as a success or failure?   Success/ Failure………..

Any other Comments as to the nature of the JSM or the Code of Best Practice?

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………
…………………………………