**Qualifying as an Expert**

**A Worksheet**

**Step 1-List all Education and formal training:**

List any formal education, training, academic qualifications, and credentials. Be sure to point out specific information regarding your education that may make you uniquely qualified.

**Step 2-Outline Experience for the layperson:**

Now, list experience not included in the attainment of your academic degree or certifications. Think about how your experience is particularly meaningful in the case in which you plan to testify. Be sure to avoid jargon or acronyms used in your industry.

**Step 3-Additional Considerations:**

In addition to an expert’s education, training and experience, there are many other qualifications that can speak to an expert’s credibility. For instance, licenses and certificates, professional associations, awards, research and publications, teaching positions, and of course prior testimony, are all relevant.

List any licenses held:

List any certificates or certifications held and what was required to obtain them/keep them:

List any Professional Associations to which you belong and include any positions held within the organization(s):

List any awards received of a professional nature:

List and explain any pertinent research conducted or for which you may have participated:

List any of your publications, contributing author, articles, etc.:

List any teaching positions you may have held. Also consider roles you may have had in presenting materials in a professional manner such as being an invited speaker to present on a subject.

Remember to include your history of prior testimony which also shows you are qualified as an expert:

**Step 4: Identify with the jury:**

List several things the retaining counsel can share with the jury that would increase the likelihood of being seen as a three dimensional person rather than a hired gun.

**Step 5-Outlining your qualifications for retaining counsel**

Now that you have evaluated all the ways in which you qualify as an expert, think about the specific case in which you plan to testify. How do you specifically have expertise of value in ***this particular case***? Use the steps above to create an outline that can be provided to retaining counsel during a preparatory meeting.

1. How can you connect to the jury?

Example:

*\*\*First became acquainted with burn injuries when my family member suffered a severe burn in a motor vehicle accident. I was a teen at the time, but this is when I realized I wanted to become a nurse.*

Now connect the dots by providing a few lines in conversational format indicating expertise without braggidose language.

Example

*\*\* I am lucky to have worked in many years in orthopedics and neurology which provided an excellent background when I began working in the burn unit. I began in case management in 1990 where I first worked with burn patients for their ongoing care needs. I have had the opportunity to manage the care for 27 burn patients in the past three years. Two of these cases became the subject of publications for our local association’s journal. One week each summer, I volunteer with the local burn camp for kids. In the past I have provided safety education to employers related to emergency treatment including burn injuries. I learned about what Medicare’s expectations are with regard to the cost of ongoing care by having written many cost projections for the insurance carriers for settlement negotiations and by writing and submitting several MSAs to CMS related to burn injuries.*