

Day One Outcomes – Fellow

This document sets out the knowledge, skills and experience which you must demonstrate before you can be admitted as a Chartered Legal Executive.

Experience

You must be able to demonstrate minimum experience requirements prior to admission. These are:

- At least 3 years of qualifying employment
- At least 1 year of qualifying employment served in the Graduate grade of membership
- At least 2 years of qualifying employment must be served immediately preceding application for Fellowship.

Qualifying employment is defined as work wholly of a legal nature undertaken for at least 20 hours each week, preferably under the supervision of an authorised person (as defined in the Legal Services Act 2007).

Competency	Knowledge outcomes	Skills outcomes
	Level 3	
	At Level 3, the studying member must achieve: Unit 1 Introduction to Law and Practice Unit 2 Contract Law Unit 3 Criminal Law Unit 4 Land Law Unit 5 Law of Tort Unit 16 Client Care Skills Unit 17 Legal Research Skills	

	<p>Plus at least 2 legal practice units and either 1 further legal practice or additional law unit from:</p> <p>Unit 6 Employment Law Unit 7 Family Law Unit 8 Law of Wills and Succession Unit 9 Civil Litigation Unit 10 Conveyancing Unit 11 Criminal Litigation Unit 12 The Practice of Family Law Unit 13 The Practice of Employment Law Unit 14 Probate Practice Unit 15 The Practice of Law for the Elderly Client Unit 18 The Practice of Child Care Law Unit 19 Residential and Commercial Leasehold Conveyancing</p> <p>See Annex A Level 3 unit specifications for further details of the knowledge requirements for each unit.</p>	
	Level 6	
<p>Legal knowledge and practical application of the law and legal practice</p>	<p>1.1 Utilise underpinning knowledge applying a range of cognitive skills</p> <p>For Law units:</p> <ul style="list-style-type: none"> • Describe, explain and interpret legal terms and concepts* • Apply the law to a complex legal scenario • Critically evaluate a given issue or situation to identify probable legal implications <p>For Practice units:</p> <ul style="list-style-type: none"> • Describe and explain legal terms and processes* • Analyse legal issues in order to offer practical advice and assistance 	<p>1.1 Apply the law to a matter</p> <ul style="list-style-type: none"> • Identify the applicable law • Describe how the law applies to the matter you are dealing with • Explain how the evidence you have supplied demonstrates your application of the law to the matter <p>1.2 Apply the relevant legal procedures to a matter</p> <ul style="list-style-type: none"> • Identify the legal procedure • Describe how the legal procedure applies to the matter you are dealing with • Explain how you have used the correct legal procedure to deal with the matter and supply supporting evidence <p>1.3 Identify and deal with the issues arising in a matter</p>

	<p>* this bullet encapsulates what each unit requires of the learner. The other bullets draw directly the wording from each unit.</p> <p>1.2 Apply legal research skills</p> <p>Understand how to:</p> <ul style="list-style-type: none"> • analyse the scope and complexity of a practical legal problem • evaluate legal research sources • perform legal research appropriately • analyse the law in relation to specific legal problems • record and evaluate information • synthesise research to present advice 	<ul style="list-style-type: none"> • The issues may be legal, evidential or factual • Identify the relevant issues in the matter • Explain how you will deal with the issues • Explain the action you have taken to deal with the matter and provide supporting evidence of the action you have taken <p>1.4 Undertake legal research</p> <ul style="list-style-type: none"> • Identify a situation in which you need to undertake legal research • Identify and evaluate the sources you need, to undertake the research • Undertake relevant and up to date research using appropriate methods and supply that research as part of your evidence • Synthesise, evaluate and apply the findings of your research to the matter you are dealing with and provide evidence of your application of the research to the matter
Communication skills	<p>2.1 Understand how to demonstrate good practice in legal writing*</p> <ul style="list-style-type: none"> • Communicate using the most suitable method of communication taking into account issues including confidentiality and cost effectiveness of communication 	<p>2.1 Communicate legal issues using appropriate methods</p> <ul style="list-style-type: none"> • Identify the most suitable method by which to communicate with the parties/organisations involved in the matter (e.g. telephone, email etc.) taking into account economic needs and confidentiality

- Write appropriate legal correspondence to the client accurately, precisely and in keeping with the requirements of professional business communication
- Use relevant information sources to produce written legal content that thoroughly and appropriately addresses the client's issues
- Write legal correspondence to the client that is logical, transparent and easy to read
- Write legal correspondence to the client using a standard of grammar, spelling and punctuation commensurate with professional business communication
- Write legal correspondence to the client with a tone and style that reflects the circumstance of the client's situation

* In addition, each legal practice unit has drafting requirements for a variety of documents for that practice area.

2.2 Understand the role played by negotiation within legal practice

- Explain the key underpinning features of successful client interviewing
- Explain the importance of negotiation in legal practice
- Explain principled negotiation, positional bargaining, collaborative and distributive negotiation
- Explain how to address communication barriers to progress negotiation
- Explain BATNA (best alternative to a negotiated agreement)
- Prepare for a negotiation in order to present one's arguments fully and effectively
- Evaluate methods of communication and persuasion in negotiation
- Evaluate the most appropriate medium for

- Explain why this method is the most effective communication in the matter
- Provide supporting documentation of the communication

2.2 Use suitable language in communication

- Use clear, concise, accurate and unambiguous language in your communication
- Demonstrate suitable professional practice, politeness and respect.
- Tailor the style of your communication to suit the needs of the recipient, where relevant.
- Explain why the language used in the example provided is suitable for the situation

2.3 Address all issues in communication

- Identify and address all relevant factual, legal or evidential issues arising in a case
- Apply relevant law and procedure in the context of your communication and provide supporting documentation to demonstrate this communication

2.4 Seek appropriate information through communication

- Identify additional information (legal, factual or other) required to progress the matter
- Communicate the request for further information
- Apply relevant law and procedure in the context of your communication
- Provide supporting documentation as evidence of your communication

2.5 Represent a client through effective use of communication and other skills

- Identify the information you need to represent the

	<p>negotiation within a legal context</p> <p>2.3 Understand the requirements for effective drafting and advocacy</p> <ul style="list-style-type: none"> • Understand the elements necessary to draft a document from scratch as well as when it is appropriate to use precedents: including addressing all relevant legal and factual issues, complying with appropriate formalities and using clear, accurate and succinct language • Understand the elements necessary to undertake successful advocacy: including the need for preparation, identification of relevant law and facts, the importance of organisation of information, the importance of a reasoned argument, the importance of reference to legal authority, compliance with formalities, how to deal with witnesses and opponents' arguments 	<p>client/service user</p> <ul style="list-style-type: none"> • Obtain this information through effective questioning and listening techniques • Represent the interests of your client or service user through use of your legal and professional skills, including drafting, negotiation and advocacy skills where appropriate • Provide supporting evidence of your representation of the client/service user
Client Relations	<p>3.1 Demonstrate a range of client care behaviours</p> <p>Understand how to:</p> <ul style="list-style-type: none"> • Provide a service for the client that identifies: <ul style="list-style-type: none"> - the client/service user's position - accurate instructions from the client/service user • Provide clear advice including appropriate courses of action, taking into account consequences, risks and costs • Take action to deal with the client/service user instructions and manage the expectations of the 	<p>3.1 Identify and understand a client's or service user's position</p> <ul style="list-style-type: none"> • Identify the position of the client/service user • Demonstrate your understanding of the position of the client/service user • Provide evidence that you have identified and confirmed the client's position <p>3.2 Take accurate instructions relating to a legal matter from clients or service users</p> <ul style="list-style-type: none"> • Use appropriate listening and questioning techniques and take accurate instructions from your client or service user. • Confirm with your client/service user that your

	<p>client/service user</p>	<ul style="list-style-type: none"> • understanding of the instructions is correct • Provide evidence of both taking the instructions and confirming the instructions with your client/service user <p>3.3 Provide clear legal advice to clients or service users</p> <ul style="list-style-type: none"> • Explain what action you will take to represent your client and outline the available options and next steps • Provide legal advice to your client or service user on the legal matter in which they have instructed you • Provide evidence of the advice provided to your client/service user <p>3.4 Evaluate the risks, costs and benefits or alternative courses of action</p> <ul style="list-style-type: none"> • Identify situations in which it was appropriate to consider any alternative courses of action that might be available to your client/service user in dealing with their legal matter • Evaluate and communicate the options (including the costs, risks and benefits of each option) to the client/service user • Provide evidence of the identification, and evaluation and communication of alternative courses of action available to your client/service user <p>3.5 Take action to deal with instructions received</p> <ul style="list-style-type: none"> • Identify how to act on your client’s or service user’s instructions • Demonstrate how you took all reasonable steps to take appropriate action (this may include your judgements and decisions in the matter) • Provide evidence of the action taken to deal with the instructions received <p>3.6 Manage a client’s or service user’s expectations</p> <ul style="list-style-type: none"> • Identify the needs, objectives and priorities of your client • Identify situations in which the objectives of your
--	----------------------------	---

		<p>client/service user may be unrealistic</p> <ul style="list-style-type: none"> • Take all reasonable steps to manage your client's expectations • Provide evidence which demonstrates communication with your client/service user in order to manage their expectations
Management of workload	<p>4.1 Manage workload</p> <p>Understand how to:</p> <ul style="list-style-type: none"> • Take instructions in order to scope, plan and prioritise work • Take into account any appropriate restraints in relation to their work (e.g. resources, time, budgets etc.) • Monitor and communicate progress • Anticipate and have strategies for dealing with unexpected circumstances • Record, store and retrieve information in line with established business procedures, including firms' policies and procedures and in compliance with audits • Comply with confidentiality, security and data protection requirements 	<p>4.1 Progress matters expeditiously</p> <ul style="list-style-type: none"> • Demonstrate dealing with your workload without causing or allowing any unnecessary delay to the progress of the legal matter • Evidence should demonstrate the progression of a legal matter without delay and may provide an example of work progressed quickly to meet a deadline <p>4.2 Plan your workload and deliver a good legal service to clients or service users</p> <ul style="list-style-type: none"> • Demonstrate planning and prioritisation of your workload including managing your files/tasks concurrently, making the best use of available resources and seeking support where necessary • Provide evidence which demonstrates planning your workload including managing a number of tasks concurrently • Demonstrate exercising judgement and being realistic about how long it will take to achieve tasks to ensure you can provide the legal services you have agreed to provide <p>4.3 Maintain files and records in accordance with procedures</p> <ul style="list-style-type: none"> • Demonstrate maintenance of your files and business systems (including databases and accounting records) in accordance with the procedures established where you work. • Demonstrate keeping files up to date and processing

		<p>financial transactions in accordance with rules and procedures and with due regard to information security</p> <ul style="list-style-type: none"> Evidence could include file reviews, ledgers etc.
Business awareness	<p>5.1 Demonstrate business awareness</p> <p>Understand how to identify:</p> <ul style="list-style-type: none"> Aims and objectives of a legal organisation The basis upon which legal services are provided (costs and billing) The practical and commercial consequences of poor client care The importance of practical and commercial issues that may affect legal advice <p>Understand the financial requirements in relation to the provision of legal services:</p>	<p>5.1 Demonstrate an understanding of the business environment of a legal practice or organisation</p> <ul style="list-style-type: none"> Identify the business and legal environment in which you work Identify and explain the aims and objectives of the practice/organisation in which you work Explain how you keep the aims and objectives of the practice/organisation in mind through your working practices <p>5.2 Evaluate the risks, costs and benefits of alternative courses of action to the business</p> <p><i>This outcome relates to the risks, costs and benefits to the business.</i></p> <ul style="list-style-type: none"> Identify alternative courses of action which arise in your work, which may have different impacts on the practice/organisation in which you work Explain how and why you have chosen one method of working over another in the context of understanding the business environment Provide practical evidence of choosing one option over another
Professional conduct	<p>6.1a Understand professional conduct issues arising in practice</p> <p>Learners must have an understanding of the CILEx Code of Conduct.</p> <ul style="list-style-type: none"> Know and understand the CILEx Code of Conduct Explain the major professional conduct aspects of the SRA and other relevant codes of conduct, including the requirements around money laundering and the risk of fraud 	<p>6.1 Apply the rules of professional conduct appropriately to relevant situations</p> <ul style="list-style-type: none"> Identify the most recent CILEx Code of Conduct and other applicable conduct rules to any matter you are dealing with, including any ethical dilemmas Identify how you will act in accordance with the rules Apply these rules of professional conduct to your work Provide evidence which supports active application of the rules of professional conduct to your work

- Describe those professional organisations within their area of practice and the benefit of membership of such organisations

6.1b Demonstrate awareness of the ethical issues and the objectives underpinning legal regulations

Understand how to:

- Identify relevant ethical issues and the consequences that flow from them
- Identify the principles arising from ethical issues and explain their relationship with the rules of professional conduct
- Use the CILEx Code of Conduct
- Use other relevant codes of conduct
- Identify those professional organisations within their area of practice and the benefit of membership of such organisations

6.2 Understand the importance of client care within legal practice

- Explain the SRA Code of Conduct rules on client care
- Explain The Law Society's guidance on client care
- Explain the sound business reasons for good client care

Each L6 legal practice unit is structured around the taking of client instructions and the giving of legal advice.

6.3 Demonstrate a range of client care behaviours

Understand how to:

- Explain the rationale underpinning the need to promote equality and diversity

6.2 Provide appropriate information to clients and service users

- Demonstrate understanding of the information which must be supplied to clients/service users to comply with professional conduct rules
- Provide evidence which demonstrates application of these obligations through the supply of details about client care and complaints handling information to clients/service users

6.3 Understand the need to avoid discrimination and promote equality and diversity

- Demonstrate up to date knowledge of current equality legislation
- Demonstrate understanding of equality and diversity issues.
- Identify issues of culture, disability and diversity and demonstrate respect for a range of attitudes and beliefs and where possible apply this to your work.

	<ul style="list-style-type: none"> • Provide a service for the client that takes into account any personal vulnerability 	<ul style="list-style-type: none"> • If possible, provide evidence from your work of a situation which demonstrates you avoiding discrimination and promoting equality and diversity
Self-awareness and development	<p>7.1 Undertake self-development</p> <p>Understand:</p> <ul style="list-style-type: none"> • How to maintain an up-to-date understanding of relevant law, research, policy and/or practice. • How to identify and when to acknowledge when work is beyond their personal competence and capability. 	<p>7.1 Evaluate your professional skills and legal knowledge</p> <ul style="list-style-type: none"> • Reflect on your performance • Identify what your strengths and weaknesses are in the work you undertake • Identify objectives for development of professional skills and legal knowledge • Plan to address and act upon any areas for improvement • Provide evidence of this reflection on practice <p>7.2 Understand the limitations of your professional skills and knowledge</p> <ul style="list-style-type: none"> • Identify where you do not have the skills required to undertake a task • Act to resolve the situation • Provide evidence of the limitation you have identified and the action you took to resolve the situation
Working with others	<p>8.1 Establish effective working relationships with others</p> <p>Understand::</p> <ul style="list-style-type: none"> • The importance of establishing effective working 	<p>8.1 Establish effective working relationships with others involved in a legal matter</p> <ul style="list-style-type: none"> • Understand the importance of establishing effective working relationships with other professionals involved in the legal matter • Provide evidence of effective working relationships you have

	<p>relationships</p> <ul style="list-style-type: none">• How to support colleagues and offer advice and assistance as required.• How to select and provide appropriate information to others as required by law	<p>with other professionals involved in legal matters that you are dealing with. The evidence should establish two-way communication with other professionals</p> <p>8.2 Demonstrate ability to select and provide appropriate information to others as required by the law</p> <ul style="list-style-type: none">• Identify what information may be legally disclosed to others• Apply the law to ensure you act within the limitations of law• Provide evidence of deciding to disclose (or refusing to disclose) information through the application of the law
--	--	---