



CILEX Experience Route

Applicant Handbook

1. CILEX

The Chartered Institute of Legal Executives (CILEX) is the professional association for CILEX Lawyers (Chartered Legal Executives), Paralegals and other legal practitioners in England and Wales. Offering unparalleled access to a flexible career in law and recognition alongside solicitors and barristers. We set high professional and ethical standards and drive greater diversity in the professional. Find out more about CILEX on our website www.CILEX.org.uk

This handbook is designed for Paralegals and other legal professionals to understand what is involved in applying to CILEX via 'APEL' - the Accreditation of Prior Experiential Learning, otherwise known as the CILEX Experience Route.

2. CILEX Experience Route

CILEX Experience Assessment is a route to CILEX membership as a Paralegal or Chartered Paralegal without the required completion of CILEX CPQ exams or other legal qualifications. The route will assess your professional competence.

To be eligible to apply you must demonstrate application of the duties (activities and behaviours) required for CILEX membership as a Paralegal or Chartered Paralegal.

Paralegal applicants using the Experience Assessment Route must have a minimum of 2 years' experience in a legal role and Chartered Paralegal applicants must have a minimum of 5 years' experience in a legal role.

At least 2 years' experience for Paralegal and Chartered Paralegal must have been gained within the last 5 years and within the law of England and Wales. For Chartered Paralegals, the remaining 3 years' experience must have been gained within the last 10 years.

What can a CILEX Paralegal member do?

A CILEX Paralegal is typically a case handler or legal assistant who operates effectively under the appropriate level of supervision. They can support a legal team; work with internal and external clients to understand their needs, obtain the necessary information and/or instructions and identify what is required to move the matter forward. They will also conduct legal research and present clear next steps, recommendations and solutions, both written and orally. They can demonstrate problem solving skills, undertake straightforward tasks on legal matters e.g., preparing client care documentation, case outlines and reviews, court submissions and complete standard documents within their area of practice referring to the appropriate legal expert for more technical legal advice and case management.

Prioritising their time, a CILEX Paralegal reliably completes work to high professional standards, applying the CILEX Code of Conduct appropriately; including, but not limited to,

conducting due diligence, maintaining confidentiality, recognising conflicts of interest, escalating matters to the team leader when appropriate, keeping up to date with changes in the law, processes and the organisation's ways of working and consistently seeking to develop and upskill.

A CILEX Paralegal must have a minimum of 2 years' legal experience, when entering membership via the experience route, and must meet the CILEX Competences.

What can a Chartered Paralegal member do?

A CILEX Chartered Paralegal is a senior or experienced legal professional, operating with a degree of autonomy. They build positive working relationships and may run their own straightforward cases. They can work with clients or a range of stakeholders to identify issues and considerations, drawing appropriate conclusions and presenting robust recommendations in the client's best interest, using logical argument and adapting their communication style to suit the audience. They can draft legal documents, conduct complex legal research and prepare information for trials or hearings, where appropriate, playing a key role in the progression, management and outcome of legal matters.

With a focus on continuous improvement, a CILEX Chartered Paralegal aligns their work to organisational objectives and professional standards. They keep up to date with changes in the law, practice, and the use of technology. They may support and/or train other members of the team and will seek guidance where needed. They bring value to their team, internal and external clients and the organisation, demonstrating commercial awareness (time, resources, public funds, budget, sustainability of business model or profitability), and maximising business opportunity.

A CILEX Chartered Paralegal must have a minimum of 5 years' legal experience and meet the CILEX Competences.

3. CILEX Assessment of Experience

The CILEX assessment of experience for Paralegal and Chartered Paralegal membership comprises two methods of assessment:

- An application – the submission of narrative evidence against professional competences (experience).
- The application must be validated by a referee, which is usually a legally qualified supervisor.
- Where required, an interview with a CILEX assessor.

The assessment period starts when the experience assessment has been paid for and the application form made available to the applicant. The window for submission of the application form will be open for a period of 3 months from the date of purchase, unless otherwise

stipulated. Once the completed application form has been received by CILEX, this will be marked by a CILEX assessor.

Results for application form assessments will be released within 8 weeks. If the application proceeds to interview, where required, results will be released within 12 weeks.

The assessment methods look for evidence of meeting the professional competencies outlined in the CILEX Competency Framework. The framework comprises of activities and behaviours, and these have been grouped into a set of duties which applicants will be assessed against.

See appendix 1 of this document for the CILEX Paralegal and Chartered Paralegal duties and associated behaviours.

3.1 Part 1. Your Application – Submission of Evidence

Purpose of the application

1. The application process is your opportunity to submit to CILEX evidence of meeting the competencies attached to the CILEX membership grade you are applying for. You will be assessed against these competencies, which are presented as duties.
2. If you are unsure which grade of membership you are eligible to apply for, you can use our eligibility checker found on our website and reference the duties found in Appendix 1 of this document. You must have a minimum of 2 years' experience to apply to be a CILEX Paralegal and 5 years' or more to apply to be a CILEX Chartered Paralegal. At least 2 years' experience must have been gained within the last 5 years, within the law of England and Wales, and for Chartered Paralegal the remaining 3 years' experience must have been gained within the last 10 years.
3. You should read the CILEX terms and conditions carefully before commencing your application.
4. Once your application has been submitted to CILEX it is reviewed by an assessor. Where an interview is required, the same assessor will conduct your interview. The narrative evidence you have submitted in your application helps the assessor to prepare questions for your interview.
5. If a Paralegal application meets the marking requirements within the application form, you will pass the assessment, unless an interview is required. If you do not meet the marking requirements, the application will be returned with feedback and there will be the opportunity to resubmit, for a fee.

6. If a Chartered Paralegal application meets the marking requirements within the application form, you will proceed to the interview stage. If you do not meet the marking requirements, the application will be returned with feedback and there will be the opportunity to resubmit, for a fee.
7. Applicants will have the opportunity to resubmit on two occasions. If an applicant does not pass the application form stage on their third attempt (initial submission and two resubmissions) they should wait at least 6 months before repurchasing the assessment. Prior to repurchasing, a full review of the application form, application form guidance and the duties and behaviours are recommended to ensure the criteria can be met.
8. Interviews are required if you are applying to become a CILEX Chartered Paralegal or if you are unable to meet the referee requirements set out by CILEX.
9. The narrative evidence you provide in your application can be referred to on the day of your interview.
10. As part of your preparations for your interview, if it is required, you must ensure that you know the examples you have given in your application well and be able to confidently discuss them in relation to the duties relevant to the membership grade.

Planning your application/submission of evidence

11. Your responses to the competency questions given in the application should bring together evidence of work undertaken by you during your most recent time in legal employment. This should be within the last 5 years. This may be from more than one employer.
12. Before you begin responding to the questions in the application you should familiarise yourself with the duties associated with the grade of membership you are applying for – CILEX Paralegal membership or CILEX Chartered Paralegal membership (Appendix 1), as these will form the basis of the questions you will be asked.
13. Typically, your application should aim to use a variety of examples. Depending on the nature of your work, you might have two or three pieces of work which cover several questions, or you might need to draw on a number of examples to fully answer the question.
14. You should select good quality pieces of evidence showing you using a range of skills to perform the duty. You should seek to demonstrate knowledge, skills and behaviours in your evidence which showcase your work experience.
15. When responding to the questions you should remember to introduce the context or situation, describe your role in addressing it, the task you carried out and the action taken or outcome. By following this approach, you are more likely to demonstrate the competencies (duties) we

are looking for. We are also looking for your understanding of the task and the impact you have made, including the CILEX behaviours you have demonstrated.

16. The behaviours we are looking for are taken from the CILEX competency framework. You are advised to read through the relevant behaviours and consider them in your responses to the questions. We are not looking for you to map each behavioural point individually, rather that you cover aspects of the behaviour more generally.
17. Behaviours are listed in Appendix 2 of this document.
18. Your application must be signed off or validated by your referee before it is submitted to CILEX. If you work in legal practice, this would preferably be an authorised legal person. If an authorised legal person is not available, your referee can be your line manager, a supervisor or a someone from a partner firm. Your referee may be from a previous employer, but that period of employment should be within the last 5 years.
19. If you are unable to provide a referee you should let CILEX know, and complete the box given in the application form which asks you to give a reason why.
20. The application and validation of experience by your referee must be completed when you submit your application via the myCILEX portal.
21. Further information is available to support your employer and referee in the 'Guidance for Employers' document.
22. Your application should be submitted using the myCILEX portal.

3.2 Part 2: Interview underpinned by your application.

Overview

23. You are required to attend an interview with a CILEX assessor if you are:
 - Applying for Chartered Paralegal membership
 - Applying for CILEX Paralegal membership but cannot provide a suitable referee who can approve your application.

The interview will take place online with a CILEX assessor on a 1:1 basis.

24. Once you have submitted your application to CILEX, your interview with the CILEX assessor will be booked by a member of the CILEX team. The date and time will be emailed to you as a calendar invitation, and you should confirm acceptance as early as possible.

25. Your interview should take place approximately 5-8 weeks after you have submitted your application.
26. Prior to your interview we may request validation of your experience from your referee.
27. Your interview, where required, will be a formal dialogue between you and the assessor. You will be expected to answer a series of questions linked to the grading criteria for each duty.
28. Your assessor will take the lead and present a series of focused questions to clarify or to address gaps in your evidence submission through the application process. The questions should allow you to demonstrate a deeper level of competence.
29. If you pass the interview assessment, you will have passed the assessment overall. If you do not meet the criteria requirements within the interview, you will be advised with feedback and there will be the opportunity to resit the interview, for a fee.
30. Applicants will have the opportunity to resit their interview on two occasions. If an applicant does not pass the interview stage on their third attempt (initial interview and two resits) they should wait at least 6 months before repurchasing the assessment. Prior to repurchasing, a full review of the application form, application form guidance and the duties and behaviours are recommended to ensure the criteria can be met.
31. Please note we reserve the right to request a resubmission of the application form following interview, if considered necessary.

Preparing for your Interview

32. It is important that you take time to prepare for your interview by:
 - reviewing the duties assessed by this method (Appendix 1)
 - reviewing the Interview Conditions document
 - reviewing your application form
 - practice discussing examples of you performing each duty (with friends, family, and/or colleagues/supervisor).
33. You should ensure you have a good understanding of the duties and competences assessed in the interview. This is what the assessor will measure your responses against to make their assessment decision.

34. You must ensure you are confident in discussing the example(s) you have presented in your application. Remember, it is up to you to select the most appropriate example(s) to answer the assessor's question and be comfortable discussing, in detail:
- your role in producing the example
 - the relevant legal, regulatory, procedural or organisational requirement, if applicable, and
 - how the evidence demonstrates you meeting the competences associated with the duty.
35. It is suggested that you practice talking about each example for several minutes. It is crucial that you understand why you selected each piece of evidence in your application and what knowledge, skills and behaviours you demonstrated in presenting it.

On the day of your assessment

36. Allow plenty of time to join your online interview and ensure that you have an accepted form of ID.
37. The interview will last for up to 60 minutes. This can be increased by up to 10% to allow you to respond to a final question.
38. If you cannot attend the interview or are having technical issues please refer to the Interview Conditions document.

3.3 Part 3: Following your application submission

39. Once you have submitted your application form to CILEX our assessors will mark your application, and it will proceed through our quality assurance measures.
40. If your application is for Paralegal membership, you should receive your results within 8 weeks, unless an interview is required.
41. If your application is for Chartered Paralegal membership you should receive the outcome of the first stage of your assessment, the application form, within 8 weeks. If you are ready to proceed to interview this will be arranged and you should receive your overall result 12 weeks from the submission of your form, or approximately 3-4 weeks following your interview with a CILEX assessor.

- 42. Your result may take longer if we request an interview, request further verification from your referee or suspect a malpractice incident.
- 43. Your result will be issued via your myCILEX account, and you will be notified by email once it is available to review.
- 44. If you have not passed your assessment, you will receive feedback from CILEX to support you should you choose to resubmit your application or resit your interview.
- 45. You will find CILEX policies relating to appeals, malpractice and special considerations on your myCILEX account.

Appendix 1: Duties being assessed.

CILEX Paralegal Duties

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| Duty 1 | Your conduct | Provides high standards of client care, acting in the client's best interests, upholding ethical and professional conduct. |
| Duty 2 | Performing Routine Tasks | Supports others to complete routine tasks, conducts legal research and analysis using digital tools. Presents information clearly and with a proposed solution/recommendation. |
| Duty 3 | Working with Legal Documentation | Identifies, processes and drafts legal documentation using appropriate digital tools. Demonstrates understanding of the purpose of the document and any legal or regulatory requirement relevant. Ability to proof reading and use clear and precise language. |
| Duty 4 | Working in a client's best interests | Acts in the best interests of the client, such as vulnerable clients. Knowledge of the law and the ability to apply this correctly to the client matter. |

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| Duty 5 | Working with stakeholders and other professionals | Supports the team and engages with stakeholders to move transactions forward, resolve issues, and build and maintain effective working relationship, recognising the principles of diversity and inclusion. |
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| Duty 6 | Progressing cases | Demonstrates understanding of the principles of workload management and progression of legal matters using systems and management tools where appropriate, to ensure all actions are accurately recorded in line with organisational procedure. Demonstrates an awareness of how technology supports legal practice. |
| Duty 7 | Commercial Awareness | Recognises and supports the organisation's commercial strategy, with an understanding of your organisations aims and objectives and how to contribute towards achieving these. |
| Duty 8 | Managing data risks and other risks to the organisation | Demonstrates understanding of key legislation and regulation including the General Data Protection Regulation (GDPR) and the Data Protection Act, with an awareness of the risks of data breach, money laundering, fraud and cyber security, and how to protect organisations from these. |
| Duty 9 | Knowing your limit. | Identifies the limits of their personal professional experience and competence and escalates instructions that are beyond their scope of expertise. |

CILEX Chartered Paralegal Duties

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| Duty 1 | Your conduct | Maintains high standards of professional and personal conduct, acting with honesty and integrity and in the best interest of the client. Consistently upholds ethical and professional conduct and regulatory duties, with an awareness of managing risk, compliance or organisational requirements. |
| Duty 2 | Performing Routine and complex Tasks | Conducts accurate legal research and analysis using digital tools to support routine and more complex legal matters. Provides clear legal advice, applying the law correctly to present options and recommendations, and communicates effectively with clients and/or stakeholders to obtain instructions. Demonstrates analytical thinking and problem-solving skills to overcome challenges. |
| Duty 3 | Working with Legal Documentation | Identifies, processes and drafts legal documentation using appropriate digital tools. Demonstrates understanding of the purpose of the documents and any legal or regulatory requirements for completion of the documents. Has the ability to proofread and draft using clear and precise language, ensuring quality and accuracy. |
| Duty 4 | Working in a client's best interests | Knowledge of, and the ability to, applying the law correctly and act in the best interests of the client, such as acting for a vulnerable client, recognising individual risks and needs. |
| Duty 5 | Working with stakeholders and other professionals | Engages, builds and maintains effective working relationships with a team, clients and stakeholders to move forward transactions or legal matters and resolve issues. Recognises the principles of diversity and inclusion and the importance of this to the client and organisation. |

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| Duty 6 | Progressing cases | Takes responsibility for their own workload, managing competing priorities and the progression of legal matters, using digital systems and management tools where appropriate, to ensure all actions are accurately recorded in line with organisational procedure. |
| Duty 7 | Commercial Awareness | Maintains a focus on the organisation's commercial strategy and economic drivers within the organisation. Identifies opportunities to maximise business, where relevant, and manage workloads to ensure commercial viability. Demonstrates understanding of the need to balance a high standard of service delivery with the organisations aims and objectives, considering time, resources, public funds, budget, sustainability of business model or profitability. |
| Duty 8 | Managing data, risks and limiting liability for negligence | Demonstrates understanding of key legislation and regulation including the General Data Protection Regulation (GDPR) and the Data Protection Act, with an awareness of the risks of data breach, money laundering, fraud and cyber security, and how to protect organisations from these. Considers risk or potential risk of negligence and takes steps to protect the organisation from such risk. |
| Duty 9 | Knowing your limit. | Gives appropriate advice and supports team members in their development, with the ability to identify the limits of their professional experience and competence and escalate instructions that are beyond their scope of expertise. Recognises the requirement to maintain knowledge and competence. |
| Duty 10 | Embracing developments | Embraces and adopts new developments in working practices and technology. Demonstrates an awareness of the need to continually develop, grow and improve, sharing ideas for best practice and process improvement. |

Appendix 2: Behaviours being assessed.

CILEX Paralegal and CILEX Chartered Paralegal Behaviours

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| Collaborative | Builds positive working relationships, respects the views and opinions of others, shares knowledge, deals with issues as they arise, works across boundaries, and makes contributions to the team. |
| Critical thinker | Collects and understands information, analyses and challenges it, identifies issues, draws appropriate conclusions to solve problems and makes robust recommendations and decisions. |
| Influencer | Creates a positive impact, communicates with others in a clear, concise and purposeful way, uses logical argument, presents information effectively, adapts communication style to suit audience and demonstrates resilience. |
| Driven to deliver | Takes accountability for quality of work, builds effective delivery frameworks, organises and prioritises, plans and structures work, sets high standards, works effectively under pressure and seeks continuous improvement. |
| Authentic | Builds trusted relationships, offers appropriate advice, acts reliably and with credibility, does what they say they will do, knows limitations of abilities, admits mistakes and consistently leads by example. |
| Curious | Future-focused, inquisitive and open-minded, shows interest in what is happening around them, seeks feedback and looks for ways to improve themselves and the organisation. |

