



# **CILEX Paralegal Experience Assessment Route**

---

## **Paralegal Membership application form guidance**

## **General guidance**

Applicable to **all** questions within the Application Form.

- **All** questions, and bullet points within the question, must be answered in full and failure to do so may result in your application being rejected. Questions should be answered in the context of your own role, and you should do your best to answer it with a focus on how you demonstrate the skills, knowledge and behaviours required to answer the question. Do not leave any question unanswered.
- All questions form part of the assessment and should be answered with an example. You may reuse the same example, but you should explain the example in the context of the question. Using 'see above' 'ditto' etc will not be accepted
- Each question is looking for a different competency or behaviour to be demonstrated and therefore you should use a variety of examples to showcase your competency.
- This is an experience route assessment, and therefore you must ensure that your application form demonstrates **your** experience of using competency, knowledge and skill to undertake your legal role.
- You should use **specific** examples to demonstrate your competency and you must use 'I' rather than 'we' wherever possible. If you worked with another person in your example, you must make it clear what your involvement was and how it demonstrates your experience and competency.
- Subheadings based on the question requirements may assist you in answering the questions and we recommend using them to ensure that you have covered all elements of each question.
- 'Client' can be internal or external. When identifying who your client is, you should consider the internal or external contact from whom you take instructions or provide legal services to. This may be an individual, a department or an organisation
- 'Stakeholder' can be internal or external and is defined as any person or organisation with a vested interest in the outcome of the matter. By 'vested interest', we mean anyone who will be impacted or affected by the outcome of the legal matter.
- You must ensure you are comfortable to discuss the examples within this application form in your interview, if one is required. Think about the level of detail you provide and any specific legal and procedural references made, as you may need to discuss these in your interview. You will use this application form to support you in the interview.
- You must ensure you explain any legal technical terms or acronyms, specific to your practice area, in your application.
- You are expected to be familiar with, and reference where requested, the CILEx Code of Conduct [Code of Conduct \(cilex.org.uk\)](https://www.cilex.org.uk/code-of-conduct)

## Duty 1

### Your Conduct

In this section you will provide evidence of giving high standards of client care, acting in the client's best interests and upholding ethical and professional conduct.

#### Guidance for all questions within this duty:

Within this duty, you must ensure that you reference the appropriate Code of Conduct. You are expected to research the CILEX Code of Conduct if you are not familiar with it to ensure you are fully explaining the regulatory knowledge, skill and behaviour expected.

## Question

### Question 1.1

You should describe your understanding of the **CILEx Regulation Code of Conduct 2019**, **identifying a specific relevant principle from the Code**, and explain how you have adhered to the code in your service delivery.

### Question 1.2

This question focuses on professional standards and ethical legal practice. You should consider what an ethical issue might be within your organisation. You must reference the **CILEx Regulation Code of Conduct 2019** and explain how it applies to the ethical issue example you are using.

## Duty 2

### Performing Routine Tasks

In this section you will provide evidence of supporting others to complete routine tasks including legal research and analysis using a range of resources, presenting information clearly and with a proposed solution/recommendation.

### Question 2.1

You must address **all** points within this question. Please see above guidance for the meaning of 'stakeholder'.

You must set out clearly the aims or objectives of your research, explaining what you needed to find out and how you approached the task. Your example must include **legal research** using reliable sources (not Wikipedia or google) and you must have formed a view as a result of your research. This will demonstrate your ability to analyse your findings, apply the law and reach a conclusion and/or recommend an outcome.

Communication of your findings may vary. It can be in a report, email, letter or note format, however your research should have been captured in some way. If you verbally advised of your findings, you should confirm how you recorded the research, so you were able to relay your findings verbally.

### Question 2.2

In this question we are assessing your ability to support others effectively. You must explain how your administration and management has contributed to a matter and driven progress.

### Question 2.3

This question focuses on your use of problem-solving skills in the context of your legal practice. You must ensure the query relates to a **legal matter**. A query of a practical nature will not suffice.

You must explain what the query was and how you dealt with it to achieve a resolution.

## Duty 3

### Working with legal documentation

In this section you will provide evidence of identifying, processing and drafting legal documentation using appropriate digital tools. You will demonstrate your understanding of the purpose of the document and any legal or regulatory requirement relevant. You will have confidence in your ability to proofread and use clear and precise language.

### Question 3.1

The documents used in this example must be of a **legal nature**, within your area of practice. They do not need to be formal court documents, but they do need to relate to a legal matter.

You must ensure you address each of the bullet points – subheadings are recommended.

You should explain the purpose of the document – simply being able to draft it is not sufficient. You need to understand what the document is for and ensure you explain how it adheres to **legal, procedural, regulatory or organisational requirements**. You should reference any relevant procedural rule, requirement etc e.g. 'Part 22.1(b) of the Civil Procedure Rules states that a witness statement must be verified by a statement of truth'.

You should explain how you ensure your language is appropriate for the intended purpose and/or recipient and how you use digital tools/resources to support you in your drafting.

### Question 3.2

This question focuses on maintaining the quality of your drafting in time pressured situations.

Ensure your answer addresses all points within the question.

### Question 3.3

You should give an example of a document you have considered in detail, paying close attention to ensure that it is accurately correct. Give details of your reviewing process, including any errors/inaccuracies or amendments identified, and how your review strengthened the document overall.

## Duty 4

### Working in a client's best interests

In this section you will provide evidence of acting in the best interests of the client, such as vulnerable clients, recognising individual risks and needs. You will show your knowledge of the law and your ability to apply this correctly to the client matter.

### Question 4.1

For this question it is important to demonstrate your knowledge and application of the law to a matter. You need to identify the legal principle(s) being applied (this may be a statutory provision, case law or procedural requirement). You should explain why the application of the law was necessary and how the law applies to the legal issue. You then need to explain the outcome of your application of the law. This may be, for example, by recording an attendance note to support your decision or action on a matter, by explanation to the client or by putting forward arguments to another party

All bullet points within the question must be addressed.

It is recommended that you set out precisely the law that you applied so that this is clear to the assessor and to better support you in interview.

### Question 4.2

This question focuses on your understanding of how you act in the best interests of your client, in accordance with the CILEX Regulation Code of Conduct 2019.

It is recommended that you identify a specific example, explain the context and how you acted in that particular client's best interests.

#### Question 4.3

Please ensure you answer each bullet point for this question. You must make it clear in your answer how you gained an understanding of your client's needs and objectives and how you were then able to act accordingly.

### Duty 5

#### **Working with stakeholders and other professionals**

In this section you will provide evidence of supporting a team and engaging with stakeholders to move forward transactions, resolve issues, and build and maintain working relationships, recognising the principles of diversity and inclusion.

#### Question 5.1

Please see above glossary for the meaning of stakeholder.

Your answer must relate to a legal matter and make it clear how your support and contribution ensured a positive stakeholder experience.

#### Question 5.2

This question focuses on your ability to resolve issues and forge strong working relationships. Ensure you explain your approach to overcoming the challenge and how your involvement helped to achieve a positive outcome.

It is recommended that you consider any CILEX behaviours demonstrated.

#### Question 5.3

This question focuses on promoting equality and diversity and your inclusive legal practice. Your example can relate to colleagues, clients, stakeholder and/or 3<sup>rd</sup> parties.

Make it clear in your answer why it was necessary for you to consider equality and diversity, and what you did to act in a fair and inclusive way.

## Duty 6

### Progressing cases

In this section you will provide evidence of understanding the principles of workload management and the progression of legal matters using systems and management tools where appropriate, to ensure all actions are accurately recorded in line with organisational procedure. You will also demonstrate an awareness of how technology supports legal practice and is used within your organisation.

#### Question 6.1

This question focuses on your use of technology, and understanding of how technology benefits the delivery of legal services to clients/stakeholders.

The list provided in this question is not exhaustive and is used to guide you in thinking about how you might use technology in your organisation.

#### Question 6.2

This question focuses on your use and understanding of how system and management tools helps to progress legal matter and ensure good workload management.

The list provided in this question is not exhaustive; you should explain the systems and management tools you use to manage your workload

## Duty 7

### Commercial Awareness

In this section you will provide evidence of recognising and supporting the organisational commercial strategy, with an understanding of your organisation's aims and objectives and how you contribute to achieving these.

#### Question 7.1

In this question you need to explain your understanding of the overall goal, aim or objective of your organisation. You should identify two specific aims/objectives and explain how you contribute to achieving these

#### Question 7.2

This question focuses on your ability to consider the objectives of your organisation (you may want to consider time, resources, public funds, budget, sustainability of business model or profitability) and give an example of how such consideration has impacted your work.

## Duty 8

### Managing data risks and other risks to the organisation

In this section you will demonstrate your understanding of key legislation and regulation including the **General Data Protection Regulation (GDPR)** and the **Data Protection Act 2018**. You will demonstrate understanding of the risks of data breach, money laundering, fraud and cybersecurity, and how your organisation is protected from these.

#### Question 8.1

You are expected to reference **General Data Protection Regulation (GDPR)** and the **Data Protection Act 2018, and any professional conduct requirements relevant to your organisation** within your answer. You should identify specific risks in the context of your area of practice/organisation and demonstrate understanding of how the processes you follow help to minimise or eliminate these risks.

#### Question 8.2

You should identify any specific risks associated with money laundering, cybersecurity or fraud in the context of your area of practice/organisation and explain how your organisation protects against these risks.

## Duty 9

### Knowing your limit

In this section you will provide evidence of identifying the limits of your personal professional experience and competence and escalating instructions that are beyond your scope of expertise.

#### Question 9.1

This question focuses on your ability to act within your own level of knowledge, competence and/or authority. You should choose an example which allows you to clearly explain why you needed to escalate (which should go beyond following your organisation's procedure) and which demonstrates your ability to recognise when work is beyond your remit and escalate appropriately.

#### Question 9.2

For this question, it is recommended that you focus on one or two examples of your training and professional development and explain its relevance to your role and how it has improved or informed your working practice.



