



# Professional Experience Guidance

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## CPQ Professional Stage

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# Completing CPQ Professional Stage

## Guidance for Trainees / CILEX Advanced Paralegals

### 1. Introduction

In order to become a Chartered Legal Executive (CLE) and CILEX Lawyer, you will need to:

- meet the requirements of CILEx Regulation (CRL) to be authorised as a CLE able to practice unsupervised in a specialist area of law, as set out in CRL Specialist Pathway Handbooks; and
- complete additional professionalism competencies, as set out in the CILEX Competency Framework, to become a CILEX Lawyer – a Fellow and CILEX Practitioner.

A trainee undertaking the CPQ Professional stage will be guided towards meeting both sets of requirements. This document explains how this currently works, although this may be subject to change in the future.

It is important to keep in mind that CILEX and CRL operate independently of one another.

- **CILEX** is the awarding body for the CILEX Professional Qualification (CPQ) and the membership body for CILEX Lawyers.
- **CRL** is the independent regulatory body of CILEX. CRL authorises individuals to become Chartered Legal Executives or Chartered Legal Executives Litigators and Advocates (who are also Fellows of CILEX and can use the post-nominals FCILEX). All CILEX Lawyers are also CLEs.

*For more detailed guidance about being authorised as a Fellow/CLE, you are advised to refer to the CRL Specialist Pathway Handbook. This can be found on the CRL website in the resource library or on your VitalSource bookshelf.*

### 2. General requirements for being authorised as a Chartered Legal Executive and becoming a CILEX Lawyer

There are certain requirements you must meet to be authorised as a CLE and become a CILEX Lawyer. You must:

- a. demonstrate technical knowledge (CILEX modules and exams);
- b. engage in a period of qualifying experience (QE);
- c. complete the CILEX Competency Framework narratives on CILEX Learn, covering the 9 core Principles and 6 core Behaviours;
- d. compile a Professional Experience portfolio of evidence that shows how you meet the expected competencies required for your chosen specialism, as set out in CRL Specialist

Pathway Handbooks; and

- e. satisfy character and suitability requirements.

In the areas of Dispute Resolution (Civil Litigation), Family Litigation and Criminal Litigation, there is an additional requirement to complete an advocacy skills course, outlined in **Section 4** of this document.

For your Professional Experience portfolio to be assessed, you must have completed all of the following steps:

- Passed all CPQ modules and exams required;
- Submitted your Qualifying Experience application form to CRL;
- Completed the CILEX Competency Framework narratives and submitted them on CILEX Learn, covering the 9 core Principles and 6 core Behaviours;
- Compiled your Professional Experience portfolio of work (ready for submission upon confirmation that the CILEX Competency Framework narratives have been met); and
- Confirmed completion of the above steps within the Professional Experience Submission Form on CILEX learn.

Once the above steps have been completed, and on receipt of the Professional Experience Submission Form, CILEX will:

1. Check your Professional Experience Submission Form to ensure all required CPQ modules have been completed and that your Professional Experience portfolio is complete;
2. Check your Qualifying Experience application has been approved;
3. Assess the CILEX Competency Framework narratives submitted via CILEX Learn;
4. Within 8 weeks, either confirm that you have met the above steps or seek further information from you; and
5. Upon meeting steps 1 – 3 above, confirm to CRL that your Professional Experience portfolio is ready to be assessed.

The table below sets out the 5 stages to Fellow/CLE and CILEX Lawyer.

**Table 1. Stages to Fellow/CLE and CILEX Lawyer**

Stage 1 - completed by CILEX trainee		
Demonstrate technical knowledge through the completion of the CPQ modules and exams	Submit a Qualifying Experience application form to CRL. Once approved, you will be eligible to apply to become a Fellow/CLE (can also be completed within stage 2)	You can start to compile your Professional Experience portfolio (all evidence within the portfolio must be dated within 2 years of the date of submission to CRL)
Stage 2 - completed by CILEX trainee		
Complete the CILEX Competency Framework narratives and submit them on CILEX Learn, covering the 9 core Principles and 6 core Behaviours	Finalise your Professional Experience portfolio, ready to submit (all evidence within the portfolio must be dated within 2 years of the date of submission to CRL)	Confirm completion of stages 1 and 2 within the Professional Experience Submission Form on CILEX Learn
Stage 3 - completed by CILEX		
Once your Professional Experience Submission Form has been received, CILEX will check stages 1 and 2 have been correctly met/completed	Within 8 weeks, CILEX will either: 1. Confirm that you have met stages 1 and 2, or; 2. Seek further information from you.	On successful completion of stages 1 and 2, CILEX will notify CRL that your Professional Experience portfolio can be assessed
Stage 4 - completed by CILEX trainee & CRL		
Submit your Professional Experience portfolio to CRL, via email, for assessment	CRL will assess the portfolio, and on successful completion, Fellowship/Chartered Legal Executive can be awarded	
Stage 5 - completed by CILEX trainee and CILEX		
CILEX Trainee: Litigation pathways only: attend a CRL approved advocacy skills course and pass the assessment	CILEX: Once Fellow/CLE has been awarded, and Advocacy passed (litigation/contentious pathways) membership status will be updated and you can call yourself a CILEX Lawyer	

## 2.1 Stage 1:

### Demonstrating technical knowledge

You will demonstrate the technical knowledge requirement by completing the CPQ exams required for your chosen pathway, including the Advanced and Professional stage modules linked to your specialist area of practice.

If you are studying CPQ and already have an LPC, BTC\* or SQE 1, then you will need to ensure that you take the Advanced stage module exam in your specialist area before attempting your Professional stage exam.

\*With a BTC you may take the *Introduction to Property and Private Client* module exam at any time, unless you are specialising in Conveyancing, in which case it must be taken first.

### Qualifying Experience (QE)

QE is defined as:

- “work that contributes to the provision of legal services” for a minimum of 2,300 hours. If you hold an LPC or BTC, this must be for a minimum of 1,656 hours (a reduction of 644 hours).
- work that is signed off by an authorised person as defined by s18 Legal Services Act 2007 (follow this link for a detailed list of professions that qualify as authorised persons: <https://www.legalservicesboard.org.uk/about-us/approved-regulators>).

In addition to meeting the qualifying experience requirements set out above, a trainee must demonstrate the following required experience to become a CILEX practitioner:

- three years’ general legal experience including two years’ practice experience in the practice area for which practice rights are sought. This practice experience must have been gained in the two years preceding application for practice rights in order to become a CILEX Lawyer.

Tasks that would contribute to your overall qualifying experience may involve undertaking an activity for a client or service user that involves the application of the law or legal practice or procedure in areas, such as:

- Running a caseload autonomously
- Taking instructions
- Dealing with client enquires which involve the provision of advice on law and procedure
- Advising and making recommendations
- Completing legal forms
- Drafting documents
- Undertaking legal research
- Corresponding with the parties to an action or transaction
- Making decisions in a legal matter based on legal principles or rule of law
- Representing in negotiations and submissions

You are advised to have your experience assessed as qualifying as soon as appropriate, either before or while studying CPQ Professional stage, in order to avoid problems or delays to your authorisation. This assessment is undertaken by CRL, and you can apply to have your experience assessed by using the Qualifying Experience Application Form on the [CRL website](#).

Check your [Education Standards Specialist Pathway Handbook](#) for more detailed guidance on QE.

## **2.2 Stage 2:**

### **Compiling a portfolio of evidence\***

At CPQ Professional stage, you will need to compile a portfolio of professional experience to show that you meet both:

- CILEX professionalism competencies as set out in the CILEX Competency Framework (narratives to be completed on CILEX Learn); and
- the CRL Education Standards Competencies for your specialism, through a portfolio of evidence.

You can access your CILEX CPQ requirements via your CILEX Learn account. This will ask you to provide narrative statements to show how you meet the Principles and Behaviours as set out in the CILEX Competency Framework.

You will also need to provide a portfolio of evidence\* showing how you meet the CRL competencies for your specialism, following the requirements detailed in your [Specialist Pathway Handbook](#) and which are summarised in this document in **Section 3**.

*\*This step may be started at stage 1.*

## **2.3 Stage 3:**

### **Submitting your Professional Experience to CILEX – narrative statements**

To meet the requirements of the CILEX professionalism competencies, as set out in the CILEX Competency Framework, you must submit to CILEX, via CILEX Learn:

- 9 narrative statements demonstrating how you meet CILEX'S 9 core Principles
- 6 narrative statements demonstrating how you meet CILEX'S 6 core Behaviours

You should ensure you read the Principle/Behaviour description fully prior to completing the narrative. Each narrative should not exceed 300 words and must demonstrate how you meet the Principle/Behaviour within your job role.

You can submit your narratives at any time; however, they will only be assessed by CILEX once you have completed stages 1 and 2 and submitted the Professional Experience submission Form to CILEX, via CILEX Learn.

Once your Professional Experience Submission Form has been received, CILEX will check all

necessary stages have been met/completed.

Within 8 weeks of receipt of the Professional Experience Submission Form, CILEX will either

- Notify you that you have correctly completed the necessary stage and advise you to submit your portfolio to CRL, or;
- Seek further information from you.

## **2.4 Stage 4:**

### **Submitting your Professional Experience to CRL**

Once you have met and completed the requirements outlined in **Sections 2 & 3**, you are able to submit your Professional Experience portfolio to CRL.

To send your portfolio to CRL, you should:

- First, save the documents (logbook sheets and evidence) as PDFs.
- Next, save the whole portfolio as one document, (saving the logbook sheet first followed by its evidence behind etc). However, the document should not be more than 10GB. If you are having difficulty saving the portfolio as one document, then break it down i.e. one competency per document.
- Finally, email the files to [wblapplications@cilexregulation.org.uk](mailto:wblapplications@cilexregulation.org.uk)

In addition to your portfolio, you must also submit:

- your completed Application Form to become a Fellow/Chartered Legal Executive (specialist pathway) [Resources Archive - CILEx Regulation](#);
- a reference from your supervisor (please see your Specialist Pathway Handbook for what this should include); and
- a copy of the letter from CRL confirming your Qualifying Experience

## **3. Compiling a portfolio of evidence to meet CRL Education Standard (specialist pathway) competencies**

To meet the CRL Education Standard you are required to provide evidence of meeting 8 competencies, which are broken down into 25 compulsory outcomes specific to your specialist pathway.

You must provide:

- 3 examples of meeting each of the outcomes in competency 1, using 3 different types of documents
- 1 example of meeting each of the outcomes from competencies 2 – 6.

CRL Competency	CRL Outcomes
<p>Evidence requirement for Competency 7. Conduct, Ethics and Professionalism, and Competency 8. Use of Technology, embedded in competencies 1 – 6.            For further guidance, see the detailed descriptors provided against each outcome listed below, provided in your <a href="#">Education Standards Specialist Pathway Handbook</a>.</p>	
Competency 1. Application of law and practice	1.1 Undertake legal research 1.2 Critically analyse facts and law 1.3 Synthesise all relevant information to provide advice 1.4 Find solutions where possible 1.5 Draft legal documents
Competency 2. Communication	2.1 Communicate orally and in writing clearly and effectively 2.2 Negotiate effectively 2.3 Deliver advocacy/oral presentation 2.4 Develop, maintain and manage 3 <sup>rd</sup> party relationships
Competency 3. Client relationships	3.1 Take instructions 3.2 Evaluate options and risk to your client 3.3 Give advice 3.4 Provide good customer service
Competency 4. Effective working practices	4.1 Progress matters 4.2 Plan workload and manage files 4.3 Manage caseload
Competency 5. Business awareness	5.1 Identify and evaluate options and risks to the business in which you work 5.2 Undertake business development 5.3 Network 5.4 Identify marketing opportunities 5.5 Identify and use financial management tools
Competency 6. Self-development	6.1 Reflect and self-evaluate including understanding your own limitations and the need for adaptability 6.2 Develop awareness of the role of your own emotions within the workplace and recognise the emotions and vulnerabilities of clients 6.3 Foster personal physical and mental wellbeing and contribute where possible to a positive workplace environment 6.4 Identify and undertake professional development necessary to ensure competence and good practice and a commitment to supervisory requirements 6.5 Demonstrate leadership and management skills (optional)

Detailed guidance on how to meet each outcome is found in [your Specialist Pathway Handbook](#).

For each example you submit to demonstrate achieving an outcome, you will need to submit a [completed logbook sheet](#) and supporting evidence.

Types of evidence that we would expect to see in support of your application should be drawn from matters which relate to (but not limited to):

- Taking instructions from clients (orally and in writing)
- Letters/emails of advice to clients
- Drafting and completing documents and forms
- Correspondence of communicating with professionals, the court, local authorities and other organisations
- Documents advising and conducting negotiations with other parties
- Complaint handling correspondence
- Skeleton arguments using case analysis and theory
- Consent orders

Your logbook sheet will require you to enter the following information:

Outcome number	Evidence submitted Or personal statement (no more than 4 personal statements may be used)	Explanation of how the evidence meets the outcome	Reflection and learning achieved	Supervisor

See **Section 2** for details on submitting your portfolio and for applying to become a Fellow/CLE.

## 4. Advocacy skills course (Litigation pathways only)

### Stage 5

If you are making an application for authorisation in Dispute Resolution (Civil Litigation), Criminal Litigation or Family Litigation, you will also be required to complete an advocacy skills course. Prior to undertaking the advocacy skills course, you must complete and submit a [Certificate of Eligibility](#).

The advocacy skills course is delivered by a third party under contract to CRL.

Once you have your Qualifying Experience and you are eligible to apply (**Stage 2**), and you have completed your portfolio (**Stage 3 and 4**), you should apply to become a Chartered Legal Executive Litigator and Advocate.

To do this you should:

- Complete and submit a 'Certificate of Eligibility' prior to undertaking an advocacy skills course
- Inform CRL of your intention to attend the advocacy skills course and complete the application [form](#)
- Provide a reference from your supervisor in support of your advocacy application
- Provide a copy of the letter from CRL confirming your qualifying experience
- Attend the advocacy skills course and pay the required fees, as required by the approved Advocacy course provider
- Pass the advocacy skills course assessment

Please consult your Specialist Pathway Handbook and/or the [CRL website](#).

If you hold a BTC you will be exempt from the advocacy skills course.

## **5. Becoming a CILEX Lawyer**

### **Stage 5**

Once CRL has approved your portfolio and application form you will be authorised as a Fellow, a Chartered Legal Executive and Practitioner and will be added to the register, subject to conduct checks. Your authorised title will be one of the following:

- Chartered Legal Executive (practice area)
- Chartered Legal Executive Litigator and Advocate (litigation practice area)

Once you have been awarded your authorised title, you will be notified by CILEX that you can call yourself a CILEX Lawyer. You will also be sent your digital credentials for CPQ completion.