

Date	9 JULY 2024
Item	08.00
Title	Director of Governance Report
Author	Richard Hood, Interim Director of Governance, Policy and Legal
Purpose	This paper provides an update on the work undertaken in the governance, policy and legal team since the last Board meeting.
Recommendation	To NOTE the update and actions identified
Timing	N/A
Impact assessment	While there are no decisions requiring an assessment, work being undertaken demonstrates that CRL is well-led, consumer-focused and uses learning to improve performance.
Impact on Regulatory Objectives	The assurance provided by this report has a positive impact on the following regulatory objectives: <ul style="list-style-type: none"> - Public interest - Consumer interest - Independent, strong, diverse profession
Implications for resources	No additional resource implications.
Impact on consumer empowerment	The consumer facing projects carried out and supported by CRL reported in this paper.
Impact on ongoing competence	The Head of Education oversees and manages all matters relating to on-going professional competence.
Publication status	For Publication
Appendices	None

(A) EDUCATION

Apprenticeships

1. Work on development of a suitable End-point Assessment tool for Advocacy continues for the new Level 7 Chartered Legal Executive Litigator and Advocate Apprenticeship Standard. However, as the current Advocacy Qualification Scheme document has not been updated by the LSB since approval in 2014, the proposed alternations to the Certificate of Eligibility requirements and assessment model will require an LSB Alteration Application. This is planned for Q4 2024.
2. Consultation with Apprenticeship Assessors on the portfolio requirements of the new Education Standards which are part of the updated Level 6 and new Level 7 Apprenticeship Standards has started. Specific Guidance on assessment of

Emotional Competence, Conduct and Ethics, and IT has been developed and published.

Higher Rights of Audience

3. Work continues with the identified training provider for a September 2024 launch.
4. To date, we have:
 - Agreed that CRL members will be added into cohorts of solicitors undertaking the training and assessment as CRL higher rights standards have been mapped against the equivalent SRA standards.
 - Agreed that CRL members will be obliged to undertake both the training and assessment and do not have the option to undertake just the assessment component as solicitors can.
 - Agreed that fees charged to CRL members will be the same as those charged to SRA members.
 - Proposed wording for the training provider's website has been developed and is under review.
 - Started to explore dates for academic year 2024/2025 with intention of offering 4 windows of training and assessment with both the option of online and face-to-face delivery methods.
 - Commenced contract drafting.

New Education Standards

5. The new Education Standards were approved by the LSB in June 2021. Unfortunately, when LSB application was submitted, the 9 individual pathways and the Probate Handbook annexes contained a number of errors which we are in the process of correcting, including:
6.
 - The 9 handbooks were not updated to reflect the LSB approved (January 2023) move from Qualifying Employment to Qualifying Experience as an experience requirement
 - Each of the 9 pathways has a common core of competencies and outcomes but have slightly differently wording or punctuation in several (or all) of the pathways. We have undertaken an exercise to identify the most appropriate presentation of each competency and outcome and applied it to each pathway

- Rights of audience requirements are included in both the Immigration and Employment pathway, but no reason has been identified as to why. We have sought advice from external advisor.
 - Applicants are advised to compile portfolios to demonstrate evidence against the competencies and outcomes within each pathway but for the contentious pathways (civil, criminal and family), it is not clear what evidence can be submitted prior to applicants undertaking the advocacy training and assessment. Again, clarification has been sought from our external advisers.
7. As the Probate Handbook and the 9 individual pathways were submitted to the LSB as part of the approval application in 2021, any amendment requires their approval. An application will be submitted to the LSB in Q3 2024 covering all corrections and updates.
 8. This application will also include the required amendments to the legacy Immigration Practice Rights Handbooks as it currently includes practice rights that can only be exercised by members with rights of audience which we cannot authorise.

(B) POLICY

Equality Diversity and Inclusion

9. CRL took part in a meeting with LSB, SRA and ICAEW to discuss the possible changes to disability and religion questions proposed at the Judicial Diversity Forum Combined Statistics Working Group (CSWG).
10. CRL participated in the Legal Regulators EDI Forum May meeting. Discussions focused on the current approach to diversity data collection, continued harmonising of data collection, inclusion metrics and potential changes to the disability and religion questions raised by the CSWG.

Consumer

11. The collaborative digital exclusion research with BSB, CLC and ICAEW progressed with MEL research sharing feedback on stakeholder interviews. CRL participated in a meeting to discuss participant research questions for field work commenced in June.
12. The consultation on proposed changes to the Transparency Rules and CILEX-ACCA Probate firms Regulations was open for six weeks between 20 May 2024 and 1 July. The consultation was communicated to the regulated community via a range of different approaches. Additional specific communications were directed to CILEX Authorised firms and CILEX-ACCA Probate firms.

13. CRL is a member of the Regulatory Information Service (RIS) project data group. The discovery phase continued at pace during April and May. CRL participated in several one-to-one meetings with the project manager and group discussions to establish minimum viable product (MVP) across all regulators.
14. CRL took part in May's meeting of the Legal Choices Steering group. Discussions included progress against the delivery plan, budget, and website traffic. The RIS discovery activities and MVP were considered and there was agreement to move the project forwards to the design stage.

(C) Communications Report – 20 April 2024 – 20 June 2024

(Previous reporting period – 20 January 2024 to 20 April 2024)

15. **Since 20 April 2024, CRL has run the following campaigns and provided support as follows:**

Campaigns

- New Social Media guidelines and guidance CRL video published in April 2024.
 - New Digital Exclusion research launched, related communications April 2024
 - OFSI general licence update – website updates and newsletter content
 - CRL's SRA consultation response publication (May 2024)
 - Transparency Rule Changes consultation. Communications created to increase awareness and engagement. New Transparency video created and published.
 - Creation of new Welsh language landing page in June 2024.
 - Approach made to Citizens Advice to include CRL link on their website (May 2024)
 - London Legal Walk 2024 (for Access to Justice) (18 June) – coordination and promotion of the event and associated fundraising across all CRL platforms.
 - Transparency consultation – publication of consultation document and creation of new Transparency video
 - Creation and publication of new Social Media Guidelines web content and new Social Media guidelines video created and published.
16. **The Policy and Stakeholder Engagement Team also provided support to the Executive Team and wider team for:**
 - Creation of new CRL communications plan and strategy outline for 2024
 - CRL response to SRA consultation on the regulation of paralegals. Liaison with Kysen PR on Press release creation and publication. April 2024
 - LeO 2024 scheme rule change published (from 1 April)
 - Publication of new CPD 2024 submission deadline and the launch of new CILEX CPD learning resources (new for 2024)

- Job advert posting for panel clerks and members roles
- CRL monthly newsletter – April, May, June 2024.
- Board update (blog) publication – May 2024
- Practice Rights documents updates – handbooks for legacy and new routes pathways for reserved activities.(PAS Team)
- Website updates – addition of new logbook and portfolio examples in relation to Practice Rights applications – May 24
- CILEX Journal Summer 2024 edition – New AI feature *Impact of AI on the Legal Sector*
- Publication of Board and strategy papers (May 2024)
- Welsh language – new Welsh language landing page has now been published on the CRL website
- CRL recruitment activity (professional panel members and support clerks)
- Monthly content planner maintained for the period, including social media content and editorial.
- BAU and ongoing promotion of CRL including increase awareness of CRL and objectives to both consumers and the regulated community.

17. **Work has also continued on ongoing projects including:**

- a) **Website audit and SEO updates** – ongoing
- b) **Google Analytics** – Review of current reporting and potential for additional stats using GA4.
- c) **Review of the Regulation Matters website** – due to continued low engagement we are considering the possible decommissioning of the site. Options discussed with Spindogs include moving content to the main CRL website or setting up a microsite. Currently reviewing feasibility, risk, costings etc with Spindogs.
- d) **Citizens Advice website** – in contact with Citizens Advice to see if we can have a link to the CRL website from their main site.
- e) **Accessibility** – messaging to increase awareness of our ReachDeck product including translation functionality.

CRL’s communication channels continue to show steady engagement across our main platforms, including the CRL website, social media and newsletters.

18. **Website and Newsletter Engagement**

CRL newsletter email open rates are as follows:

Edition	Open Rate
April 2024	43%
May 2024	35%
June 2024	TBC
Industry Standard	15-35%

19. CRL Press Releases

Date	Press release
May 2024	CRL response to SRA consultation on the regulation of paralegals

20. Engagement and Reach

The following is a summary of CRL's communications engagement* and reach for the reporting period:

Channel	20 October 23 – 20 Jan 24	20 Jan 24 – 20 April 24	20 April 24 – 20 June 24	Highest engagement (for reporting period)
CRL Website	Total users: 16,055 Engaged sessions: 41,175	Total users: 18,057 Engaged sessions: 46,464	Total users: 11,877 Engaged sessions: 28,309	Top 5 pages views: 1. Practitioners Directory – 4,625 users (11,307 views) 2. Schedules – 891 users (6,020 views) 3. Home page – 1,662 users (3,871 views) 4. Resource library – 577 users (2,447 views) 5. Chartered legal executives – 1,741 users (2,402 views)
LinkedIn followers	4702	4822	4853	LinkedIn posts with the highest engagement (top 3): 1. London Legal Walk – 11.28% 2. Recruitment – Enforcement panels – 8.04% 3. Transparency consultation – 6.85%
LI average post engagment rate*	4.24%	5.58%	4.1%	
Twitter followers	1615	1626	1624	Twitter posts with highest the engagement: (top 3) 1. Recruitment – 8.9% 2. London Legal Walk – 4.5% 3. Transparency consultation - 4.7%
Twitter average post engagment rate**	0.50%	2.8%	2.0%	

Regulation Matters website	Total users: 185 Engaged sessions: 19	Total users: 1,118 Engaged sessions: 640	Total users: 400 Engaged sessions: 355	Top 5 page views: 1. Home page – 129 (80 users) 2. Features – 106 (19 users) 3. Chairs blog May 24 – 61 (41 users) 4. Case studies – 28 (12 users) 5. Advocacy case study – 27 (23)
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*Industry standards: 2% and above is considered good engagement

**0.33 to 1% is considered very high

Recommendation

The Board is asked to **NOTE** the update and actions identified.