

Date	14 July 2026
Item	08.00
Title	Director of Policy and Governance Report
Author	Jonathan Levack, Director of Policy and Governance
Purpose	This paper provides an update on the work undertaken in the policy and governance teams since the last Board meeting
Recommendation	To NOTE the update. To DELEGATE approval of the CRL response to the Legal Ombudsman Consultation on Scheme Rules, Case Fees and publishing decisions to the Chair To APPROVE the CPD sampling exercise report for publication
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: • 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 with redactions
Appendices	08.01 CPD Sampling Exercise Report 08.02 Response to LSB PERL Statement of Policy

EDUCATION

[REDACTED]

[REDACTED]

[REDACTED]

CPD Sampling Exercise 2024/2025

3. The CPD Sampling Exercise for CPD year 1 October 2024 to 30 September 2025 has now been completed and the CPD Sampling Report has been finalised.
4. 94% of members sampled were compliant with their CPD Obligations for CPD Year 2024/2025 which is a 1% increase on last year's exercise. A report of the findings is annexed to this paper.

Court of Protection

5. CILEX fellows working in the Court of Protection face uncertainty with their roles and, in particular, with regard to their ability to acquire practice rights. We require a discussion with the CoP to confirm current practice rights available to CILEX Fellows, CoP requirements for CLEs undertaking litigation work for CoP hearings, and explore how we can better support CILEX Members with CoP roles.
6. Engagement with the Court of Protection has proved challenging. As a result of MoJ liaising with colleagues within CoP, we have now established contact with the Office of the President of the Family Division.

Probate Practice Rights

7. As previously reported, we published guidance for CILEX Fellows with Probate Practice Rights and CILEX Probate Practitioners confirming what activities their Probate Practice Rights authorised them to undertake and more importantly, what activities they could not undertake without Reserved Instrument (Conveyancing) Practice Rights.
8. Following publication, we were asked to meet with CILEX's Director of Policy and Public Affairs and the Chair of the CILEX Private Client SRG Group, Ian Hunt, to discuss the guidance further. CILEX presented us with a list of 9 activities that, in their view, can be undertaken by unauthorised persons without Reserved Instrument (Conveyancing) Practice Rights or the need to be under the direction or supervision of an authorised person.
9. CRL's solicitors were asked for their advice on CILEX's view on the 9 activities. Advice received stated that only 4 could be undertaken by unauthorised persons. A summary of

advice received findings was shared with CILEX in May, and a further meeting to discuss the findings is scheduled for the morning of 7 July 2026.

POLICY

Professional Ethics and the Rule of Law

10. The LSB published its statement of policy on professional ethics and the rule of law on March 6th, following a consultation in 2025. The LSB have identified three areas where regulators must act:

- a. More consistent education and training in ethics
- b. Clearer and more practical regulatory guidance
- c. Stronger workplace support for lawyers in upholding standards

11. A paper is included as part of this report that sets out our proposed actions to meet the LSB's requirements.

EDI

12. We continue to make progress against our EDI strategy. Actions for Q3/Q4 include:

- work improving collation and analysis of existing diversity data to improve biennial reporting and progression data,
- communication campaigns tailored to different segments of CILEX members to support promotion of the value and rigour of CRL accredited qualifications and
- presentations within entity webinar to encourage consideration of and engagement with EDI and build on the digital exclusion research

13. The LSB are expected to issue an EDI statement of policy later in the year.

Evaluation of Transparency Rule changes

14. We introduced new Transparency Rules, approved by the Legal Services Board (LSB), in September 2024. We committed to evaluating their impact by the end of 2026. We are currently scoping this work.

Regulatory Information Service

15. The RIS entered public beta in May 2026. There remains a number of issues with the project, including duplicate records and inconsistent information.

Legal Ombudsman Consultation on Scheme Rules, Case Fees and publishing decisions

16. LeO has launched a 12-week [consultation](#), which closes on 2 September 2026. The consultation proposes changes in three key areas:

- Scheme Rules – to support clearer expectations and more efficient complaint resolution
- Case fees – to incentivise earlier resolution of complaints and better complaint handling at source.

- Publishing decisions – to enable greater transparency over time.

17. These proposals are a response to growing demand for LeO's services, with case volumes increasing by 37% in 2025/26 alone, placing significant pressure on its current operating model.

18. An oral update on CRL's position will be provided at the Board meeting. As the consultation closes before the Board's next meeting, the Board is asked to delegate authority to the Chair approve the final response on its behalf.

Artificial Intelligence

19. The team are currently preparing guidance for entities and practitioners on the use of AI in the delivery of legal services. The guidance is intended to be supportive of the safe and compliant use of AI.

GOVERNANCE

20. The CEO formally joined the Board in June. A communication about governance changes will be issued shortly.

COMMUNICATIONS

Webinar

21. We are hosting a webinar for CILEX members on July 21st. This is part of our strategy to develop deeper engagement with the regulated community.

22. The webinar will discuss 2026 progress, Mazur lessons learned and look forward to the 2027 business plan and budget. We see this as an opportunity to demonstrate that we have listened to feedback and are now able to address some of the issues facing professionals.

23. At the time of writing, over 100 CILEX members had signed up.

CRL Press Coverage

24. 20 May 2026 - *Over 1000 Litigation Practice Rights authorisations - CILEx professionals demonstrate true professionalism.*

Coverage - <https://todaysfamilylawyer.co.uk/over-1000-chartered-legal-executives-secure-standalone-litigation-practice-rights-in-the-wake-of-mazur/>

<https://todayswillsandprobate.co.uk/over-1000-chartered-legal-executives-secure-standalone-litigation-practice-rights-in-the-wake-of-mazur/>

<https://todaysconveyancer.co.uk/over-1000-chartered-legal-executives-secure-standalone-litigation-practice-rights-in-the-wake-of-mazur/>

[Over 1,000 Legal Executives Granted Litigation Rights – Solicitor News](#)

25. New Law Journal - *Moving on from Mazur - John Barwick, CILEx Regulation's CEO reflects on both the impact and opportunities to come from this landmark case.*
Publication date – 10 July 2026.

CILEX Journal

26. Next edition – Summer 2026: *“Progress, Priorities and the Road Ahead”* feature (inline with CRL’s July webinar). To be published end of July.

Newsletter Engagement

27. CRL dotDigital newsletter email open rates:

Edition	Open Rate
January 2026	45%
February 2026	45%
March 2026	45%
April 2026	44%
May 2026	45%
June 2026	39%
Industry Standard	15-35%

Engagement and reach

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

Channel	20 November to 20 January 2026	20 January to 20 March 2026	20 March to 20 June 2026	Pages with highest engagement (for reporting period)
CRL Website	Total users: 12,933 Engaged sessions: 18,901	Total users: 15,041 Engaged sessions: 22,144	Total users: 16,818 Engaged sessions: 24,097	Top 5 pages views: 1. Practitioners Directory – 19,461 views 2. Home page – 5,796 3. Schedules – 4,874 4. Resource Library – 4,583 5. Work based learning – 3,081
LinkedIn followers	8,975	9,090	9,172	LinkedIn posts with the highest engagement (top 3):

LI average post engagement rate*	5.9%	5.6%	5.2%	2026 London Legal Walk CRL Team update: 8.83% - May Strategic Board meeting – 8.41% - Amendments to Practice rights portfolio route – 6.14%
Twitter followers	1,583	1,576	1,563	Twitter posts with highest the engagement: (top 3)
Twitter average post engagement rate**	Currently unable to access `X` analytics	Currently unable to access `X` analytics	Currently unable to access `X` analytics	(Currently unable to access Twitter `X` analytics - upgrade required)
Regulation Matters website	Total users: 115 Engaged sessions: 84	Total users: 118 Engaged sessions: 85	Total users: 143 Engaged sessions: 102	Top 3 page views: - Home page – 34 views - Feature – Qualifying Experience – 25 views - Feature – Independent Practice Rights – 21 views

*Industry standards: 2% and above are considered good engagement rates

**0.33 to 1% is considered high.