

Date	17 September 2026
Item	08.00
Title	Director of Policy and Governance Report
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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.
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	

EDUCATION

Training Provide Update

1. [REDACTED]

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

Court of Protection (CoP)

4. Five months after the initial request for clarification, a response to the questions raised with the Court of Protection President's Office was received in late July 2026. The President's Office confirmed that responsibility for determining the appropriate litigation and advocacy practice rights for Chartered Legal Executives working in the Court of Protection rests with CRL.
5. The [guidance](#) issued in November 2025 in relation to litigation practice rights for Chartered Legal Executives working in the Court of Protection remains correct. The guidance advised CILEX members to seek litigation practice rights through either the Civil or Family pathway, depending on the nature of the Court of Protection work they undertake. We have now drafted an update to the guidance, which includes information on Rights of Audience.
6. However, further clarification has been sought from the President's Office on whether Higher Rights of Audience are required in relation to certain types of Court of Protection hearings.
7. In the meantime, we met with a group of CILEX members calling themselves the 'Court of Protection Collective' on September 4th. The meeting was constructive, enabling a good exchange of views on current challenges facing Court of Protection practitioners, current practice rights pathways and the support available to applicants, engagement with the Court of Protection and the potential for developing specialist pathways.

Probate Practice Rights

8. Despite repeated reminders, we have yet to receive a response from CILEX regarding our solicitors findings on the nine conveyancing activities that CILEX considers may be undertaken by unauthorised persons.

MOJ Legal Education Task and Finish Group

9. CRL have been invited by the MoJ to be part of its Legal Education Task and Finish Group. The purpose of the group is to 'build a shared evidence base and review whether current legal education and qualification pathways are aligned with skills, capacity and diversity needs of the legal services sector and the judiciary now and in the future'. It has 4 main objectives:

- mapping key post-18 routes into the legal profession
- assessing whether these pathways support workforce needs, including diversity and assess, and
- identifying barriers, risks and evidence gaps across the systems
- developing practical recommendations for the board, government and sector partner

10. Representatives from the BSB and Bar Council, the SRA and Law Society, and the CLC were invited to attend alongside CRL. CILEX also joined the meeting.

11. A further meeting is to be held in the first 2 weeks of September to agree a working schedule.

Quality Assurance Strategy

12. The proposed strategy has been developed and will be presented to the Board with the 4 appendices at Item 10.

POLICY

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

13. CRL's response to the consultation was submitted on September 2nd.

Artificial Intelligence

14. The team have prepared 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. This takes account of Board feedback.

15. We are currently engaging with stakeholders, including CILEX and the SRA, before publication.

Temporary adjustments to evidential requirements for litigation portfolio applications

16. In January, CRL introduced temporary adjustments to the litigation practice rights portfolio evidence requirements for a period of six months. The adjustments were

introduced to provide a proportionate and supportive approach for experienced CLEs seeking litigation practice rights who may need to rely on older evidence to support their application. Following discussions with the CILEX Support Group, the adjustments were extended for a further three months to September 30th.

17. We do not intend to further extend the adjustments as they are no longer necessary. This is based on various factors including application volume and the length of time these adjustments have now been in place. We will continue to accept portfolio applications that benefit from these adjustments up until September 30th.

s.55 Response

18. The LSB's review of regulatory guidance on the conduct of litigation set out recommendations and requirements for regulators going forward, including greater engagement between regulators in the production of future guidance. It also required regulators to take proportionate steps to better understand the scope of authorisation and practice among their respective regulated communities.

19. A current focus is designing changes to the annual returns process to ensure better data about current CILEX members' practice.

GOVERNANCE

20. A news item detailing the various governance changes agreed at the May Board meeting was issued in August. We are planning a recruitment campaign for the new associate Board member role in the Autumn.

COMMUNICATIONS

Webinar

21. We hosted a webinar for CILEX members on July 21st. This was intended as an opportunity to engage the regulated community on progress in 2026, future priorities and the 2027 PCF.
22. While audience engagement was generally good, attendance was below expectation – of the roughly 130 sign-ups only 70 attended.

CRL Press Coverage

23. Features created for – New Law Journal Mazur and CILEX Journal summer 2026 edition features looking at lessons learned from Mazur and forward look.
24. [Moving on from Mazur](#) - In this New Law Journal article, chair of CILEx Regulation John Barwick looks back at the impact and learning opportunities to come from this landmark case. 10 July 2026.
25. [Mazur: Lessons Learned](#) - CILEX Journal (summer 2026 edition) feature analyses our response to the Mazur crisis and the important lessons learned to help support a

modern, responsive, future-focused regulation and continue to protect consumers and support the regulated community. 13 July 2026.

Website and Newsletter Engagement

26. CRL dotDigital newsletter email open rates:

Edition	Open Rate
February 2026	45%
March 2026	45%
April 2026	44%
May 2026	45%
June 2026	39%
July 2026	41%
Industry Standard	15-35%

Engagement and reach

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

Channel	20 January to 20 March 2026	20 March to 20 June 2026	20 June to 20 August 2026	Pages with highest engagement (for reporting period)
CRL Website	Total users: 15,041 Engaged sessions: 22,144	Total users: 16,818 Engaged sessions: 24,097	Total users: 9,998 Engaged sessions: 14,151	Top 5 pages views: 1. Practitioners Directory – 11,934 views 2. Schedules – 3,333 3. Home page – 3,319 4. Resource Library – 3,161 5. Work based learning – 1,924
LinkedIn followers	9,090	9,172	9,204	

				Linkedin posts with the highest engagement (top 3):
LI average post engagement rate*	5.6%	5.2%	4.9%	1. 2026 Mazur Lessons Learned Report publication: 11.91% 2. May Strategic Board meeting – 8.41% 3. Amendments to Practice rights portfolio route – 6.14%
Twitter followers	1,576	1,563	1,566	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: 118 Engaged sessions: 85	Total users: 143 Engaged sessions: 102	Total users: 82 Engaged sessions: 60	Top 3 page views: 1. Home page – 24 views 2. Feature – Independent Practice Rights – 8 views 3. Case studies - 7

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

**0.33 to 1% is considered high.