

Date	10 May 2023
Item	5.0
Title	Acting Chief Executive's Report
Author	Vicky Purtill, Acting CEO
Purpose	This report updates the Board on key activities across the organisation since 23 February 2023, including the performance papers and education update which were formerly part of the Chief Operating Officer's Report.
Recommendation	To NOTE the report.
Timing	N/A
Impact assessment	None
Impact on Regulatory Objectives	<p>Section One of this report provides an update on activities carried out by the CEO and senior managers and a summary of other areas of the business of which the Board should be aware. These affect all the regulatory objectives. More detail will be found in other reports presented at the meeting.</p> <p>Section Two [REDACTED with exception of Education Standards Update] covers strategic performance and education matters. Monitoring performance of the organisation ensures that CRL is able to meet the regulatory objectives, in particular: protection of the public and consumer interest, access to justice, promoting competition and encouraging an independent, strong, diverse and effective legal profession.</p> <p>Ensuring that the education, training, and ongoing competence requirements of the regulated community are regularly reviewed promotes the protection of the public and consumer interest, access to justice, and encouraging an independent, strong, diverse and effective legal profession.</p>
Implications for Resources	<p>This report covers staffing, operations and resource implications affecting CRL since the last board meeting. These are also covered in more detail in the People Strategy paper at Item 9 [NOT PUBLISHED].</p> <p>CRL's PCF (practising fee) was approved in December 2022 and, in addition, CRL has both contingency and operating reserves. Therefore, financial resources are satisfactory.</p> <p>IT resourcing generally is satisfactory; however, the shared services element of the CRM remains challenging.</p>
Impact on Consumer Empowerment	This report covers some high-level meetings linked to consumer empowerment. The consumer facing projects and issues can be found in the Director of Governance report.
Impact on Ongoing Competence	Section Two of the report provides an update on progress to implement the LSB's statement of policy on ongoing competence.
Publication Status	Section One is for publication; items within the performance papers and education report may be redacted.
Appendices	5.5 Operations Data

Section One: For Publication

Legal Services Board

1. The outcome of the LSB's investigation into CILEX and CRL was published on 18 April 2023.
2. The next LSB/CRL relationship management meeting is scheduled for 27 April 2023.

CILEX

3. CRL's Acting CEO and the CILEX CEO have held a series of meetings since 23 March 2023 to discuss collaborative working as part of the conclusion of the LSB's Investigation.

Applications

4. No applications have been submitted to the LSB since the last Board meeting.

Staffing and Operations

5. The Acting CEO resigned on 21 March 2023 and will leave the organisation on 16 June 2023, having replaced the permanent CEO on 13 March 2023. An Interim CEO has been appointed with effect from 17 April 2023. A competitive process, in accordance with CRL's Standing Orders, will be conducted later this year to appoint a permanent CEO.
6. An offer has been made to replace the Practitioner Authorisation & Supervision Manager who left at the end of March 2023. If the offer is accepted, CRL expects the new Manager to take up the position on 2 May 2023.
7. The PA at CRL resigned on 4 April 2023 and will leave the organisation on 2 June 2023. CRL is seeking a replacement PA.
8. CRL held a face-to-face staff meeting on 14 March 2023 and an online staff meeting on 13 April 2023.

CRM update

9. Meetings with CRL and the CILEX CRM Project coordinator have not been held since December 2022. CRL has now been notified that these services will end in June 2023 and responsibility will transfer to the IT team.
10. Key project updates include:
 - a. The online portfolio project is being developed to support apprenticeship delivery, CRL expects that the functionality may assist in the creation of a solution for CRL's portfolio requirements.
 - b. As stated at the last Board meeting, CILEX IT and Silver Bear continue to develop the Entity Directory to enable it to meet LSB requirements. This should have been available to CRL from August 2019. Following the introduction of ACCA firms, additional changes have also been requested. The process has taken longer than anticipated as the ACCA work has been undertaken whilst overlooking the original development work. It is expected that a revised version of the directory will be available for testing shortly. An oral update will be provided to the Board, if available.

Shared Services

11. At its April Board meeting, the Board agreed alternative provision for HR services, and this is being pursued by the Acting CEO for implementation. An update will be provided at the July Board meeting.
12. Other shared services continue and were agreed as part of the 2023 PCF application.

External meetings

13. The Chief Operating Officer and Practitioner Manager met with the SRA on 17 February 2023 to discuss CRL's proposed application to the LSB to obtain Higher Rights of Audience for suitable CILEX members. The discussions were positive, and the SRA supported CRL's application.
14. The Chief Operating Officer presented the proposals for the new Chartered Legal Executive Apprenticeship to the Institute for Apprenticeships and Technical Education (IFATE) Route Panel meeting on 24 February 2023. As a result, the Route Panel recommended the creation of the new apprenticeship and the standard continues to progress through IFATE governance.
15. CRL has been invited to attend a meeting of the Legal Choices Governance Board on 18 May 2023.
16. CRL will be attending the Legal Services Consumer Panel Standardisation of Consumer Information Roundtable on 20 April 2023. An oral update will be provided to the Board.

Recommendation

17. The Board is asked to **NOTE** section one of the report.

Section Two: For Partial Publication: This section of the report replaces the Chief Operating Officer's Report.

18-41 REDACTED

Education Standards Update

Higher Rights of Audience consultation

42. CRL has had a meeting with the SRA to discuss the alignment of CRL's proposed standards for suitably competent chartered legal executives to obtain higher rights of audience. The outcome of the discussion was positive and the possibility of sharing the SRA's training and assessment supplier was also discussed.
43. CRL is now working with its external advisers to finalise the draft competence framework, after which this will be put out to consultation for final commentary from a range of stakeholders, prior to submitting an application to the LSB for rule change towards the end of 2023.

Ongoing competence

44. CRL has completed the actions required from Q1 of its action plan. More information will be provided to the Board on progress and proposals at the strategy meeting on 9 May 2023.

Recommendation

45. The Board is asked to **NOTE** the update.