

The Institute of Paralegals
Setting Standards for Non-Lawyers in the Legal Profession

www.InstituteofParalegals.org
www.LegalStandards.org

www.ParalegalPractitioner.com



**Introducing National Competency Standards for Legal Secretaries
and Accompanying LPQ Qualifications**

1. What are National Competency Standards for Legal Secretaries?

NCS are a list of the nationally-consistent skills and knowledge that legal secretaries ought to have.

Only core skills and knowledge are contained in the NCS so they can be used by all legal secretaries, wherever they work: solicitors' firms, local government, in-house legal departments etc.

The standards are divided into 12 categories: managing information, managing workload, IT skills etc.

They also incorporate professional conduct obligations (these have been verified by the Solicitors Regulation Authority).

There is a different set of standards for each of the three main levels of legal secretarial career: introductory, intermediate and advanced.

2. What are the standards meant to do?

- Provide a nationally consistent performance and skills/knowledge benchmark
- Improve staff appraisals and appraisal criteria
- Create an internal career path with clear goals and targets for progress
- Assist with creating personalised learning and development plans
- Recognise the professionalism of legal secretaries
- Allow employers to have better, more detailed discussions with recruitment agents
- Help chart the changing nature of the legal secretarial job role
- Create agreed competency benchmarks for new nationally consistent qualifications

3. Who created the standards?

The standards are published and owned by the Institute of Paralegals, a not-for-profit professional body. The standards were created at the request of solicitors' firms. There are some 70 law firms, government departments, legal regulators and others either on the working party, or who have requested a watching brief (see list in appendix).

4. How are NCS used?

NCS can be used in any way that an employer wishes. The most commonly use is to supply the relevant tier of standards to each secretary and their line managers. What this means is that the employer must make an initial assessment of whether the secretary in question is at the introductory, intermediate or advanced level. The appropriate tier of standard is then used for her.

The secretary and line manager between them work through the relevant tier of standards until the secretary can meet all of them. The HR and Learning & Development departments also reference the standards for recruitment, appraisal and training purposes.

The secretary then moves up to the next tier until she completes the advanced tier. At that point, secretaries have either reached the top of the secretarial profession and will just continue as is, or they will look to develop their skills in other areas (often moving on to the introductory tier of the Paralegal NCS, or into administration/management and utilising the legal assistant NCS).

Other employers incorporate the standards (or elements of them) into existing internal standards. Once an employer has subscribed to the standards then it can use as it wishes (although always respecting copyright and not in any way reselling them in whole or part).

5. How much do the Legal Secretarial NCS cost?

Nothing. They are free.

However there is a subscription service at £70 per year for them. For that sum subscribers:

Automatically receive all updates, amendments, corrections and notices concerning the Legal Secretarial series and the standards in general

Receive copies which have provision for subscribers to mark individual standards as having been met, and which also allow for a verifier to initial their confirmation

Receive copies in Word 97-2003 format for easy editing/cutting and pasting

Have the opportunity to speak with the Institute about implementation of the standards

Are eligible to be/register candidates for the LPQ qualifications (Legal Secretarial NCS only)

6. What qualifications are attached to the NCS?

At present only the legal secretarial standards have qualifications attached to them.

There is an LPQ legal qualification attached to each individual tier of the legal secretarial NCS:

- LPQ Introductory Certificate in Legal Secretarial Practice

- LPQ Intermediate Certificate in Legal Secretarial Practice

- LPQ Advanced Certificate in Legal Secretarial Practice

7. What is an LPQ qualification, and who issues them?

LPQ stands for "legal professional qualification". LPQs are, strictly speaking, legal rather than secretarial qualifications.

LPQ is the "brand name" for legal qualifications designed especially for non-lawyers working in a legal environment.

The three secretarial LPQ qualifications will be issued by a National Awarding Body.

National Awarding Bodies (Edexcel, OCR and City & Guilds being the best known ones because they award GCSEs and A levels) are specialist qualification awarding bodies approved by the government and regulated by the Qualification & Curriculum Authority.

Unlike qualifications issued by professional bodies or companies, National Awarding Body qualifications must comply with stringent government guidelines relating to content, rigorous assessment etc.

The National Awarding Body awarding the LPQs is iam, The Institute of Advanced Management (see www.instam.org).

8. How much do LPQ qualifications cost?

They are by far the cheapest legitimate legal qualifications on offer. They cost £95+VAT per candidate per tier (total £109.25). So a secretary taking the *LPQ Introductory Certificate in Legal Secretarial Practice* would pay £109.25.

As and when she moved on to the *LPQ Intermediate Certificate in Legal Secretarial Practice* she would pay another £95+VAT.

NB: there is no obligation to start at the introductory level. A senior legal secretary may wish to immediately try for the advanced level certificate.

Please note that employees are not eligible to take the LPQ unless the employee or employer is a subscriber to the legal secretarial standards.

Subscription to the legal secretarial standards series costs £70 + VAT per annum regardless of the number of candidates for an LPQ.

9. Do secretaries have to take the LPQ?

No. The LPQ is an optional extra. It was introduced because employers asked that their secretaries be able to receive a qualification that proved that they met the national benchmarks at the relevant tier.

Employers can also use the standards without signing any secretaries up for the LPQ qualifications.

10. How do I sign up for an LPQ?

There are only four straightforward steps to sign up for an LPQ, and only eight simple steps to obtaining an LPQ qualification:

- a) The employer completes the simple Microsoft Excel registration form giving some basic details about the candidate and itself.
- b) The employer designates an internal verifier or verifiers and provides brief details about who they are. Usually line managers overseeing candidates, the job of verifiers is to verify when a candidate has successfully met a standard and tell the Institute about it (keeping a brief record of how when and why is the candidate proved she could meet the particular standard to the verifier's satisfaction). Verification is usually done on a rolling basis which best suits both secretary and verifier.

- c) The names of the candidates that the verifier is responsible for will be provided (it can be all the candidates from the firm or just some of them. If there are a lot of secretaries then employers may wish to have a "pool" of verifiers to spread the verification workload around).
- d) The employer pays £95+VAT per candidate plus a single annual verifier licence fee of £25 + VAT. If the employer or employee have not yet subscribed to the standards then they need to do so at this stage.
- e) The Institute will work with verifiers to keep an updated record of a candidate's progress. Should the secretary change employer whilst working towards her LPQ she can continue to work towards it with her new employer if the new employer agrees/provides new verifiers.
- f) When a secretary (i.e. a candidate) has completed all the standards then either she or her verifier will contact the Institute and ask for an assessment to be supplied. The assessment is an essay. The secretary does it at home/work unsupervised in her own time (a generous amount of time is given to do the essay; there is no 48-hour turnaround anything like that). The essay will be a reflective piece based upon what the secretary has learnt, and its relevance to her work. Assessment is usually done by the candidate doing an essay at home. There is never an exam.
- g) The essay is submitted for marking to professional assessors with iam (the £95 goes on registration, the online account, assessment of the essay and awarding of the qualification). If successful, the secretary is awarded her LPQ qualification.

11. Do LPQ candidates have to build a portfolio and will they be visited?

'No' to both questions.

One of the concerns of the law firm members of the Institute's NCS working party was that the LPQ would encourage secretaries to start hoarding copies of confidence correspondence and file notes as proof of their compliance. They were also concerned that outside verifiers would see such confidential information, and secretaries changing jobs but wishing to continue working towards their LPQ would take confidential information with them.

It is to address these concerns that iam allows employers to designate their own verifiers. If the verifier has signed off a standard as having been complied with, then the secretary does not need to keep any further proof of compliance. The verifier has to make a file note of what the secretary did to satisfy him/her that the standard was complied with. However such a file does not need to contain any confidential information. The file notes will only be viewed by iam should the employer be chosen at random for audit (one of the Qualifications & Curriculum Authority requirements to ensure rigorous assessment).

12. When can somebody sign up for an LPQ, and how long does it take to complete?

Secretaries can sign up at any time - it is a rolling programme. The only requirement is that the employer remains a subscriber to the standards whilst it has outstanding candidates.

The LPQ is a qualification, not a course. There is no teaching pack or syllabus provided. Candidates have to meet the standards. How they achieve the skills/knowledge to do that is a matter for them and their employer.

That said, the standards are meant to accurately reflect the sort of work that the vast majority of legal secretaries do. Therefore most will not need to attend a special course. When they learn something new during the working day as part of their job they may find that they are now in a position to meet another one of the standards. So in the absence of formal training, how long it will take to meet a standard will depend entirely upon. The secretary's pre-existing skills and experience (perhaps she immediately can prove to the satisfaction of the verifier that she meets 40% of the standards at her tier).

It is likely that some secretaries will take formal training and that will speed up compliance with the standards. It is also likely that recruitment and training companies will start offering training to the standards to improve the job prospects of would-be/new legal secretaries.

13. Further information on National Competency Standards and LPQs

Visit the NCS website at www.LegalStandards.org or telephone the Institute of Paralegals on 020 7887 1420.

End

Appendix

The following organisations are either on the working party or have requested a watching brief:

1. Berrymans Lace Mawer
2. Birmingham City University Law School
3. Blackburn College
4. Bond Pearce LLP
5. Buckles Solicitors LLP
6. Charles Russell
7. Central College Glasgow
8. City of London Law Society
9. Cobbetts
10. Compliance Recruitment Solutions
11. Council for Administration
12. Crown Prosecution Service
13. Dawsons
14. Denton Wilde Sapte
15. Dickinson Dees LLP
16. Edwards Angell & Palmer Dodge LLP
17. Eversheds
18. Farrer & Co.
19. Field Fisher Waterhouse LLP
20. Finers Stephens Innocent LLP
21. Fox Williams LLP
22. Gide Loyrette Nouel
23. Halliwells
24. Harvey Ingram LLP
25. HBJ Gateley Wareing LLP
26. Herbert Smith LLP
27. HR in Law
28. Jacobs Solicitors
29. Keoghs LLP
30. Land Registry
31. Law Society of England & Wales
32. Law Society of Scotland
33. Law South
34. LawNet
35. Legal & Contract Services Limited
36. Legal Education & Training Group
37. Legal Secretaries of DC
38. Legal Services Commission
39. Legal Services Ombudsman
40. Manches LLP
41. Mayo Wynne Baxter LLP
42. Mills Reeve
43. Ministry of Defence
44. Ministry of Justice
45. Morgan Cole
46. Munday's LLP

47. Norton Rose
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48. Pinsent Masons
49. Platinum Training Solutions
50. Police National Legal Database
51. Reed Smith
52. Resolution
53. Shakespeare Putsman LLP
54. S J Berwin LLP
55. Scottish Paralegal Association
56. University of Lincoln Law School
57. Shearman & Sterling
58. Shepherd Evans
59. Simmons & Simmons
60. Skills for Justice
61. Solicitors Regulatory Authority
62. Taylor & Emmet
63. Taylor Vinters
64. Thompsons
65. Thomson Snell & Passmore
66. TLT solicitors
67. University of Lincoln
68. University of Westminster
69. Weightmans
70. Wragge & Co.