

## **APIL CORPORATE ACCREDITATION SCHEME**

## CORPORATE MEMBERSHIP FOR SOLICITORS' PRACTICES SUMMARY OF CRITERIA FOR ACCREDITATION

#### THE ORGANISATION

# The accredited organisation or office must be a solicitors' practice, or an individual office of such a practice

- The organisation or office is listed on the register of firms of solicitors, or other permitted bodies, maintained by the Solicitors Regulation Authority.
- The organisation or office is listed by the Solicitors Regulation Authority as the practising address of those solicitors who are the accredited members named in the application for accreditation.

Name of firm:	
Office address:	
Website:	
How many PI and clinical negligence fee earners do you employ in your office?	Please tick if your firm has been awarded with Lexcel accreditation

Please enter number

(In the case of organisations with a number of offices, each appropriate office at each firm is required to apply for accreditation separately.)

#### ACCREDITED MEMBERS

The accredited organisation or office must have at least one individual who is accredited as a Senior Litigator (or higher) for every ten fee earners, and who has personal responsibility for the supervision and management of personal injury work conducted in the organisation

• The organisation or office seeking accreditation must have within it at least one member who is accredited as a Senior Litigator (or higher) for every ten fee earners and who has personal responsibility for personal injury work carried out in the organisation or office

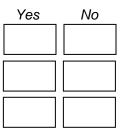
Name of APIL Senior Litigator (or higher)

Name of applicant (if different) \_\_\_\_\_

### CLIENT CARE

#### The accredited organisation or office maintains high standards of client care

- Every accredited member within the organisation or office has signed an undertaking to abide by the APIL code of conduct
- Every accredited member within the organisation or office has signed an undertaking to abide by the APIL consumer charter
- Training in customer care is provided to all staff with "first point of contact" responsibilities, including telephonists and receptionists, and this is recorded in training logs



Please confirm by ticking the appropriate boxes

Name of client care representative

### PERSONAL COMPETENCE

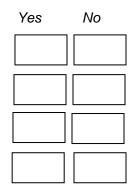
All fee earning staff within the accredited organisation or office provide advice to clients that is complete and of good quality, take appropriate decisions at key stages of litigation, and maintain their files in good order

Through regular file reviews, the accredited organisation or office should satisfy itself as to:

- The quality and completeness of advice given to the client`
- The adequacy of the range of options considered at key stages of litigation, and the appropriateness of the option selected
- Whether the decisions taken by the fee earner lie within the range of reasonable decisions, having regard to the applicable law, and the facts and merits of the case
- Whether the file has been maintained in good order and in accordance with the policies of the firm, such that it could be taken over without difficulty, if necessary, by another fee earner

The following evidence must be available:

- The files of all fee earners are subject to review which addresses the quality of the legal work undertaken
- Such reviews address the bulleted points above
- Appropriate action is taken to address any shortcomings, both to protect the interests of the client and to remedy any inadequacies of performance by the fee earner



Please confirm by ticking the appropriate boxes

#### TRAINING AND DEVELOPMENT

The accredited organisation or office makes use of the APIL standards of competence in developing its fee earning staff. It ensures that all of its accredited members and other staff are provided with training and development opportunities to enable them to keep up-to-date, to develop their skills and knowledge, and to meet the needs of clients

- The personal development of all fee earners is based upon the achievement of the competencies in the relevant APIL standards. For those in general PI these are the Litigator and Senior Litigator standards. For paralegals and others processing claims through the Portal, the Portal Claims Handler standard is relevant. Those undertaking specialist work in areas such as Clinical Negligence should have personal development based upon the relevant specialist standard. The relevant Candidate Portfolio may be used for these purposes, even if it is not intended to submit an individual for personal accreditation.
- All accredited members undertake a minimum of 16 hours APIL accredited personal injury training annually, including attendance on at least one APIL accredited personal injury update course lasting six hours or the equivalent in individual sessions. Personal injury update training must cover the very latest in the four key areas of procedure, guantum, liability and funding
- All accredited members devote a minimum of three hours per month to reading current and relevant case reports and keep a record of this in their personal training logs
- All accredited members attend a training course, or take part in developmental activity, designed to maintain and enhance client care, at least once every five years
- Senior litigators and above may claim double hours for delivering training up to a maximum of 10.5 hours
- All accredited members may claim double hours for writing published articles and books up to a maximum of 4 hours
- All accredited members maintain a personal training log, which includes course attendance, distance learning, writing and delivering
- The organisation or office subscribes to recognised PI publications as recommended above and makes these publications available to all fee earning staff
- The organisation or office manages the workload of fee earning staff so as to provide for time to be spent on reading current and relevant case reports

Yes No





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Please confirm by ticking the appropriate boxes

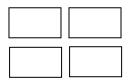
#### SUPERVISION

# The accredited organisation or office has effective arrangements for the supervision of all lawyers undertaking personal injury work

- Any Fellows are responsible for the personal supervision of no more than ten Senior Litigators
- Senior Litigators are responsible for the personal supervision of no more than ten Litigators
- Litigators are responsible for the personal supervision of no more than ten other support staff
- Adequate training in supervision and management is provided to all Litigators, Senior Litigators and fellows with supervisory responsibilities

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Yes	No

- There is effective and regular appraisal of staff, making use (where appropriate) of the APIL Standards of Competence as a tool to assist in the planning of training and development
- The senior management of the organisation as a whole is well-informed about and supportive of the personal injury function



Please confirm by ticking the appropriate boxes

Please provide the names of those who are APIL Litigators:

Please provide the names of those who are APIL Senior Litigators:

Please provide the names of those who are APIL Fellows:

Please provide the names of those who are APIL Senior Fellows:

#### QUALITY ASSURANCE

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# The accredited organisation or office has in place effective arrangements to assure the quality of its legal work

	Yes	No
The organisation or office has properly documented processes for progressing matters through the stages of litigation, in a timely manner The organisation or office has arrangements in place, which enable a second opinion to be brought to bear on a matter, where this is appropriate The organisation or office has arrangements in place for files to be reviewed at key stages, and for a small random sample of all files to be reviewed periodically Properly documented procedures are in place for the authorisation of key steps in litigation Procedures are in place for a review, by a person other than the fee earner, of files on which there has been no movement within	Yes	
a specified period.		

Please confirm by ticking the appropriate boxes

#### MONITORING

#### The accredited organisation or office submits to monitoring of its performance by APIL.

	Yes	No
The organisation or office will cooperate fully with APIL monitoring		
The organisation or office will include in the firm's standard letter of engagement a provision that will permit (unless the client opts out) inspection of client files for the purpose of monitoring by APIL		

Please confirm by ticking the appropriate boxes



## **ACCREDITATION FEES**

#### Annual fees for corporate accreditation:

Standard rate for each office of each firm - £225.00 + VAT

Concessionary rate for sole practitioners -  $\pounds$ 150.00 + VAT (Sole fee earner at firm)

<u>Fees for in-house accreditation (optional):</u> To accrue APIL accredited hours through personal injury training delivered within your organisation or office

Annual assessment per office - £225.00 + VAT

Each office of each organisation must apply separately for APIL accreditation

Please make cheques payable to APIL

### DECLARATION

Corporate accreditation



I confirm that we wish to apply for corporate accreditation in accordance with the above criteria and will notify APIL if our circumstances change.



Being authorised by my firm so to do, I hereby confirm that we are in compliance with those criteria that place obligations upon the firm with respect to supervision, training, client care, and the maintenance of procedures, and I undertake that the firm will remain in compliance with the same.



I acknowledge that APIL may monitor our compliance with these criteria.



I agree to be bound by the rules relating to use of the APIL accredited logo.



I agree that the firm will offer a free initial consultation to members of the public.



\*I am a sole practitioner and the only fee earner at this firm.

In-house accreditation



I wish to apply for in-house accreditation and agree to be bound by the rules relating to in-house accreditation

Please tick applicable boxes