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# Training Rules

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21 July 2020 (version 4)

Costs Lawyer Standards Board

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These rules replace all other Training Rules previously issued by the Costs Lawyer Standards Board (CLSB). They aim to ensure those who seek to achieve Costs Lawyer status through the Costs Lawyer qualification (Trainee Costs Lawyer) achieve detailed knowledge of costs law and practice, develop skills of legal analysis, reach a high level of competency and learn valuable transferable skills.

## 1. Accredited study provider

- 1.1. Study for the Costs Lawyer qualification may only be undertaken with a provider accredited by the CLSB. The register of Accredited Study Providers (ASP) can be located on the CLSB website at [www.clsb.info](http://www.clsb.info).

## 2. Age requirement

- 2.1 The minimum age of an applicant to become a Trainee Costs Lawyer (Applicant) is 18 at the date study will commence with an ASP.
- 2.2 If requested by an ASP, the Applicant will provide proof of their date of birth before their application is considered.

## 3. Entry level qualifications

- 3.1 The minimum level of qualification (or equivalent) for an Applicant is:
  - (a) four GCSE at grade C or above, English and maths being compulsory;
  - (b) two A level passes and 1 GCSE at grade C level to include English;
  - (c) three AS level passes to include either English or maths;
  - (d) GNVQ at intermediate or advanced level, provided a communications skills element is included; or
  - (e) passing a written aptitude test set by an ASP and approved by the CLSB.

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## 4. Application to an ASP

- 4.1 It is not a requirement that an Applicant is a member of the Association of Costs Lawyers at the time of application to an ASP or during their period of study with an ASP as a Trainee Costs Lawyer.
- 4.2 An application must be submitted fully completed (signed, with all required information and documentation) by the date stipulated by the ASP.
- 4.3 Documentary evidence of entry level qualifications must be submitted with an application. Photocopies will be acceptable unless the ASP specifically requests a certified copy.
- 4.4 An Applicant must provide the name, address and phone number of two referees, one personal and one professional. Each referee must know the Applicant well enough to vouch for their character and know of any problems the Applicant may have had e.g. convictions, disciplinary issues, plagiarism.
- Personal referee: Should be a person who has known the Applicant for at least three years.
  - Professional referee: Should be a professional person who has worked with the Applicant, preferably as the Applicant's manager/supervisor.
- 4.5 The ASP will advise the Applicant in writing whether an application has been approved. In the event an application is refused, the ASP will state the reasons why.

## 5. Disclosure requirements

- 5.1 On an application to an ASP, the Applicant must declare any information that might reasonably be expected to affect their fitness to become a Costs Lawyer. Such information will include that they have:
- (a) been subject to any criminal charge, conviction or caution, subject to the Rehabilitation of Offenders Act 1974;
  - (b) been subject to an adjudication of bankruptcy;
  - (c) been granted a debt relief order;

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- (d) entered into an individual voluntary arrangement or a partnership voluntary arrangement;
  - (e) been a director of any company or partner in an LLP or partnership that has been the subject of a winding up order, an administrative order or an administrative receivership, or has otherwise been wound up or put into administration in circumstances of insolvency;
  - (f) been disqualified from being a company director or the trustee of a charity;
  - (g) been the subject of disciplinary proceedings by any regulatory or professional body; or
  - (h) been the subject of an adverse order or finding of a civil court or employment tribunal.

5.2 In the event of any declaration(s) under rule 5.1 the ASP will consider the suitability of the Applicant and the ASP may refuse the application.

5.3 On receipt of an application, the ASP may make any required checks, including criminal records checks, to ensure the suitability of an Applicant. A failure to disclose, or the provision of misleading information on an application will be taken into account by the ASP when considering the suitability of an Applicant to become a Trainee Costs Lawyer.

## 6. Qualifying experience

6.1 There is no requirement that an Applicant or Trainee Costs Lawyer is employed in costs law and practice at the time of their application to an ASP or during the course of their study with an ASP.

6.2 To successfully complete the Costs Lawyer qualification a Trainee Costs Lawyer will be required to evidence to the ASP that they have also achieved three years' work experience in costs law and practice (Qualifying Experience). The three years' Qualifying Experience need not be continuous.

6.3 On successfully completing the Costs Lawyer qualification the ASP will audit Qualifying Experience to ensure it was achieved and was relevant i.e. in costs law

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and practice. The ASP will not issue a completion certificate of the Costs Lawyer qualification until:

- (a) all the Costs Lawyer qualification has been successfully completed; and
- (b) the ASP is satisfied Qualifying Experience required under rule 6.2 has been achieved.

## 7. Learning support

- 7.1 If an Applicant or Trainee Costs Lawyer has or develops any needs that may affect their learning then they are required to notify the ASP on application or when the need arises.

## 8. The Costs Lawyer course

- 8.1 The Costs Lawyer course is as set out by the CLSB, located on the CLSB website at [www.clsb.info](http://www.clsb.info). The pass rate for each yearly unit is 50%.
- 8.2 Once the Costs Lawyer qualification has been completed, there will be no further training obligations by a Trainee Costs Lawyer to an ASP.

## 9. Exemptions

- 9.1 A table of CLSB approved exemptions to modules/units for qualifications including a law degree, bar professional training course, legal practice course and CILEX qualification can be located on the CLSB website at [www.clsb.info](http://www.clsb.info).
- 9.2 Exemptions will be applied by an ASP where an Applicant has evidenced they have successfully undertaken study for the exempted module/unit. An Applicant will assist an ASP in validation of a qualification otherwise no exemptions will be applied.
- 9.3 Where exemptions are applied, an ASP will apply a reduction of 15% per exempted module on the overall unit fee. Where all six modules in a unit are exempted, no fee will be payable to the ASP for that unit.

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## 10. Continuing professional development (CPD)

10.1 A Trainee Costs Lawyer is not required to undertake any CPD during their period of study for the Costs Lawyer qualification.

10.2 On successfully completing the Costs Lawyer qualification a Costs Lawyer may then apply to the CLSB for a Costs Lawyer practising certificate. Only then is CPD to be achieved with accountability to the CLSB. A Costs Lawyer practising certificate authorises a Costs Lawyer to undertake the following reserved legal activities under the Legal Services Act 2007:

- The exercise of a right of audience
- The conduct of litigation
- The administration of oaths.

## 11. Appeal process

11.1 In the event an application is refused by an ASP under rules 4, 5 and 6, the Applicant may, within 14 days, make a written appeal to the CLSB.

11.2 The Applicant must set out in full the reasoning for the appeal and attach all required evidence e.g. application, ASP decision and other relevant supporting documentation.

11.3 The CLSB will use all reasonable endeavours to consider the appeal within 14 days.

11.4 The CLSB will advise the Applicant in writing as to the appeal outcome, setting out its reasoning in full.

11.5 The CLSB will send a copy of the appeal outcome to the ASP.

11.6 In the event the CLSB upholds the Applicant's appeal, the ASP will comply with the appeal outcome of the CLSB.

**END**