



The Council
of the Inns
of Court

Qualifying Sessions External Observers Handbook

2024/2025 Handbook

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Introduction

Qualifying Sessions (QS) are the vehicle by which the Inns deliver the bulk of their training to student Barristers. They have developed over many years into a programme at which high quality education is delivered in a context where those learning are exposed to the Inns' community of practitioners and external experts.

Each Inn has an Education Department which is responsible for delivering the QS programme. The staff in the Education Department work closely with internal committees made up of members of the Inn in the management of the programme.

Quality is vital to the Inns' educational provision. It has been agreed between the Inns and the Bar Standards Board (BSB) that External Observers (EOs) will observe and report on the delivery of QSs. This will run alongside the feedback obtained by Inns from their own internal observers. This input will be part of the quality assurance mechanism put in place for the delivery of QSs and as such has been included in the Memorandum of Understanding between the Inns and the BSB.

Inns will be observed by External Observers every two years. The intervening years will be known as 'Development Years'. During these Development Years Inns will continue to receive feedback from their internal observers.

This handbook sets out the framework within which you will operate as an EO along with information which will assist you in the task. It will be accompanied by Inn-specific information which will be provided by the Inn to which you are assigned.

Regulatory Documentation

The following documentation can be found here.

- Inns of Court Qualifying Session Quality Assurance Operational Guidance – Annex 1
This document includes information and reporting templates.
- The Joint Inns Education and Qualification Rules – Annex 2
These are the rules pursuant to which the Inns carry out their educational functions.

Links to the following documentation can be found here.

- [Memorandum of Understanding between the Inns and the BSB \(MOU\) and its annexes](#)
- [BSB Handbook](#)
- [Bar Qualification Manual](#)

QS Attendance Assessment Forms

Enclosed within the Operational Guidance document at Annex III is a pro forma assessment form for use when attending and observing QSs. The form used by your Inn may look slightly different to this, not least because it may well be provided for you on-line, but the content will be mostly the same across the Inns. The completed assessment form should be sent to the nominated person at the Inn to which you are assigned within 10 working days of your attending the QS event. Prior to attendance at each QS you will be provided with the Description for the specific QS which will include its learning aims.

Student Meetings

To aid transparency students will be informed that the Inns have EOs assisting them. EOs will, in the first and last term of each academic year, chair a meeting with a group of current Bar course students, the aim being to identify the expectations the students have at the start of their Bar course regarding QSs and whether these have been met by the end of this period. General feedback regarding the students' experiences is also gathered. The feedback obtained through these meetings will be reviewed alongside that obtained from students after individual QSs. You can structure these meetings in a way that suits you but you will be required to feed back to the Inn's education staff after they are completed using the form provided at Annex VI of the Operational Guidance document. This form sets out the areas the Inns specifically wish to hear the students' views on. The meetings will be arranged by Inn staff. Students should be advised that names will not be attributed to any specific feedback given. The broad headings set out in the form at Annex VI should be used in the production of the agenda for the meetings.

Annual Report

You will be required to submit a report to the Inn, copying in Joanna Robinson at COIC, by the end of June annually, giving an overview of the year, using the template enclosed at Annex VII of the Operational Guidance document. These reports will be shared between the Inns and COIC and will inform the annual Inn's Self-evaluation Report. An overview of the four Inns' Self-evaluation reports will be produced each year by COIC and this, along with the individual Inn reports, will be submitted to the BSB.

Serious Concerns

EOs should use their judgment and discretion to determine when there are concerns that are sufficiently serious in nature to merit raising them immediately with the nominated person at the Inn rather than including them in feedback or in the annual report. In such circumstances the Inn concerned will reply to the EO in writing setting out the action that will be taken in response.

Dialogue with the Inns & COIC

The main contact you will have during the course of your work will be the nominated person at the Inn to which you are assigned. Ordinarily they will be the person to whom you will communicate any queries or concerns you may have but in addition you can discuss matters with Joanna Robinson, Head of Quality & Standards at COIC, should it feel more appropriate in the circumstances. Several meetings will be arranged through the year where the EOs and Joanna Robinson will get together as a group. At these meetings you can share your experiences and discuss any queries which have arisen.

Past Reports

At the start of each academic year you will be provided with reports produced by previous EOs, previous Self-evaluation Reports and the COIC overview reports which have been supplied to the BSB for the last two years. If you wish to see additional reports please ask the contact at your Inn.

Transfer to the next Inn

In advance of the end of each academic year you will be advised which Inn you will be moving on to and the necessary induction will be organised.

Expenses

The expenses policy and claim form are enclosed at Annex 3. Expenses will be refunded by the Inn to which you are assigned after each event attended on submission of the relevant form with accompanying receipts. The form used by your Inn may look different to that included here but the content will be the same across the Inns.

Fee Payment

The fees will be paid by COIC via BACS. You are required to submit invoices to Joanna Robinson via email as indicated below.

- £820 upon completion of the induction programme and the first student meeting and delivery of the student meeting report to the Inn;
- £815 after attendance at a residential event and delivery of the related report to the Inn;
- £815 once the minimum number of QS have been observed, the second meeting with students has been conducted and all feedback reports and the annual report have been submitted.

Invoices should include your name, address, bank details and date and should set out which of the above payments you are seeking and which Inn you are working with.

Glossary

You will find a glossary of terms which you might come across in your work with the Inns at Annex 4.

Inter-Inn Data Sharing Protocol

The detail of the information that is shared between the Inns is set out in a data sharing protocol. This can be found at Annex 5.

Chronology

A chronology setting out the key events for each year can be found at Annex 6.



The Council
of the Inns
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Qualifying Sessions Quality Assurance Operational Guidance

CONTENTS

INTRODUCTION 3

ANNEX I - GUIDE TO WRITING LEARNING AIMS..... 7

ANNEX II - QS DESCRIPTION - INFORMATION..... 9

ANNEX III - COMMON OBSERVER FEEDBACK QUESTIONS..... 11

ANNEX IV - COMMON STUDENT FEEDBACK QUESTIONS..... 14

ANNEX V - ROLE DESCRIPTION AND PERSON SPECIFICATION FOR EXTERNAL OBSERVER15

ANNEX VI – STUDENT MEETING FEEDBACK FORM 18

ANNEX VII – EO ANNUAL REPORT TEMPLATE..... 20

INTRODUCTION

This document sets out the quality assurance mechanism that the Inns have put in place in relation to the delivery of Qualifying Sessions (QSs). It puts into effect the principles set out in the Memorandum of Understanding between the Inns & COIC and the Bar Standards Board (BSB) and its annexes as referred to in the Joint Inns' Education and Qualification Rules.

The Inns will individually plan their QS programmes in accordance with the Qualifying Session Framework and will ensure there is a variety of content and mode of delivery and that a proportion of QSs are delivered outside of London. All QS events, including those delivered in collaboration with others, will be required to comply with this QA mechanism. Each QS event will have clear learning aims which those observing will be asked to assure against when providing feedback. The feedback received will assist the Inns in their ongoing review of their QS programmes and will also feed into the annual Self-evaluation Report provided to the BSB.

The mechanism in place at the Inns for the Quality Assurance of QS is made up of the following elements:

1. QS Description,
2. internal and external observation,
3. student feedback, and
4. annual Self-evaluation Report for the BSB.

1. Qualifying Session Description

A description will be given for each QS event that will include its learning aims and will provide a structure within which feedback will be sought from observers and student attendees. Each Inn will have an internal mechanism whereby the description for each QS event is approved. Key to the delivery of consistently high-quality QSs across the Inns are the clearly set out content and practicalities of the QS event and the expected learning aims for it. Guidance has been produced to assist the Inns in the drafting of these. This can be found at Annex I. The list of required description information for each QS can be found at Annex II.

2. Internal & External Observers - Feedback

- Qs will be observed by both internal and external observers. Each Inn will have observation from an External Observer once every two years and from internal observers every year. Years in which External Observers work with an Inn are known as Observation Years. Those years in which there is only internal observer involvement are known as Development Years. Internal observer feedback will be sought for a cross-section of each Inn's QS events covering all themes set out in the QS Framework;
- External Observers will each observe 5 QS events each year at the Inn to which they have been assigned which will include attendance at one residential weekend event.

Feedback will be provided by observers to their Inn within 10 days of each QS event.

Observers will be provided with the descriptions for each QS event they observe. The form found at Annex III sets out the feedback which will be requested from all those carrying out observation of Qs. The feedback is designed to be a critique of what has been observed rather than solely a report of what was observed. The aim is to generate feedback which is similar in format across the Inns to enable them to write standard format annual Self-evaluation Reports (see 4. below). Inns are permitted to ask additional questions of observers if they wish.

In addition to providing feedback on specific QS events the External Observers will twice in each Observation Year meet with a group of students in order to explore what their expectations are of the QS programme and whether these were met. In the Development Years these student meetings will be chaired by the internal observers. A form for observers to use to feed back to their Inn on their discussions with students can be found at Annex VI. Feedback on the student meetings will be provided to the Inn within 10 days of the event.

External Observers will produce annual reports of their findings by the end of June each year. A template for the report can be found at Annex VII.

The Role Description and Person Specification for external observers can be found at Annex V. This, together with the other documents included in the External Observer Handbook, sets out how the role of External Observer will operate.

3. Students - Feedback

Student feedback will be sought for a cross-section of each Inn's QS events covering all themes set out in the QS Framework. The form at Annex IV sets out the core feedback questions which will be asked of students attending QSs at all Inns. Inns may ask additional questions of students if they wish.

As with feedback sought from external and internal observers student feedback will be taken into account in the annual Self-evaluation Report.

4. Annual Self-evaluation Report

Each Inn will gather the feedback obtained regarding their QSs, will review it along with any complaints received and will decide any necessary action (or if no action is required). This review work will feed into the annual Self-evaluation Report which will be produced by each Inn and which will form part of an overall Inns' report which will be submitted annually to the BSB.

The annual Self-evaluation Reports will include that set out in Schedule 4 of the MOU ie. the 'Assurance Framework'. Information must be provided in the following areas:

- Whether the Inn has met its obligations in relation to student membership, the administration of fit and proper checks and the delivery of QSs as set out in the MOU in line with the four principles of Bar Training. If risks have been identified, mitigating actions are to be set out.
- The number and type of QSs which have been provided and the number of places made available.
- The number of student admissions processed.
- The number of matters relating to the fit and proper checks processed.
- Detail of complaints received.
- Areas where there have been challenges along with an analysis of changes and trends.
- Areas of good practice and quality enhancement.

The Inns are also required to highlight changes which have been made since the last evaluation along with the reasons for the change and the impact of it.

The Inns will receive annual reports from the External Observers by the end of June each year. This will enable them to produce their individual Self-evaluation Reports which will be supplied to COIC by the end of November each year. COIC will then put together an overview report which will be supplied, with the Inns' reports, to the BSB by the end of February.

Review

The QS quality assurance mechanism will be periodically reviewed to ensure it works effectively.

ANNEX I - GUIDE TO WRITING LEARNING AIMS

There is a difference between the Description for a QS and its Learning Aims.

The QS Description will cover several things including what, how, who, how long, where, when and why.

The Learning Aim/s will cover what it is expected that the student will gain as a result of attending the QS. They are a statement of intention for the QS that help students decide if they wish to attend and what to expect when they do. A Learning Aim can be a paragraph or a single sentence, depending on the complexity of the QS and the material that will be covered during it. Learning Aims must be specific to that session and be clear and achievable. When writing Learning Aims, the following questions should be considered:

- What is the purpose of the QS?
- What is the QS trying to achieve?
- What are the main benefits of the QS for the students?

Examples:

Lecture on Wellbeing

The aim of this QS is to give students an understanding of the strategies and interventions that contribute to wellbeing and to give information about the tools and techniques for managing stress.

Advocacy Workshop

This QS will provide students with an opportunity to practise submissions advocacy and receive individual feedback on the strengths and weaknesses of their performance, as well as the opportunity to observe the performance and feedback of their peers.

Ethics Workshop

This QS provides students with an understanding of how the Code of Conduct is applied to various ethical scenarios. Students will discuss which of the core duties is engaged in each scenario, how they interact with each other and how to formulate a correct course of action.

The Learning Aims should not refer to the Professional Statement or the 5 QS themes as this information belongs in QS Descriptions and the QS Programme aims & objectives. The overarching purpose of QSs (the induction of students into the professional community) is very important but it belongs within the aims and objectives of the QS Programme as a whole.

The following table provides examples of Learning Aims which fit with specific types of QS.

Qualifying Sessions Type	Skills Acquired ie. the Learning Aims will cover these types of learning
<p>Lectures and panel discussions where students observe others saying or doing things.</p> <ul style="list-style-type: none"> • These will have limited Learning Aims. 	<ul style="list-style-type: none"> • Acquire knowledge & understanding • Application (possibly) • Analysis or Synthesis (probably not) • Evaluation (probably not)
<p>Practical exercises</p> <ul style="list-style-type: none"> • Eg. advocacy weekends, or any type of activities where the STUDENT gets hands-on skills practice. 	<ul style="list-style-type: none"> • Acquire knowledge & understanding • Application • Analysis or Synthesis • Evaluation (possibly)

Learning Aims are useful for a range of audiences. The main recipients are of course the students but they will also be of use to the speakers and tutors as they will help them be better informed as to what is expected. They are also of use to the Inns and COIC in quality assurance terms as they make it easier to ascertain if a QS has delivered what was intended which in turn facilitates accurate reporting to the BSB.

ANNEX II - QS DESCRIPTION - INFORMATION

Information to be recorded prior to each Qualifying Session, provided to internal and external observers and used to provide a structure within which feedback will be sought from students who are planning and booking Qs.

Content:	
1.	Title of QS
2.	Format of QS: [tick boxes] <ul style="list-style-type: none"> • Lecture • Panel Session • Interactive seminar • Skills Workshop • Guided Discussion • Moot • Debate • Other competition • Acting as volunteer witness/advocate • Multi-activity event eg. residential weekend or Education Day (to be split into elements). • Other: please specify.
3.	What will happen at the QS.
4.	Learning Aim/s
5.	QS Framework Theme/s [tick boxes] <ul style="list-style-type: none"> • Ethics, Standards & Values • Advocacy Skills • Legal Knowledge, Justice & The Rule of Law • Equality, Diversity & Inclusion • Management of Pupillage, Career Development & Wellbeing
6.	The element/s of the Professional Statement or other public interest matter that the QS is aligned to.
7.	Length of QS.
8.	Number of Qs the event will count for.
9.	Whether the QS is interactive. [tick boxes] Yes/No
10.	Whether there is a requirement for students to prepare in advance. [tick boxes] Yes/No If yes what preparation is required.
Practicalities:	
11.	Date of QS
12.	Tutors or speakers (in the case of large or multi-activity events the Lead Tutors should be listed along with the number who are supporting).

13.	Venue
14.	Number of student places available.
15.	Interaction with Community of Practitioners. [tick boxes] Yes/No
16.	Materials
17.	Cost

ANNEX III - COMMON OBSERVER FEEDBACK

QUESTIONS

To be read in conjunction with the Description information for each QS.

To be provided to the Inn within 10 days of attendance at the event. Once completed please forward this form to _____.

Please indicate the extent to which you agree with the following statements.		Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
Content:						
1.	The title of the QS gave a clear indication of the content.					
2.	The format identified was used.					
3.	The description of what was due to happen was followed in the QS.					
4.	The QS provided the opportunity for the set learning aim/s to be met.					
5.	The correct QS Framework themes were identified.					
6.	The Professional Statement or other public interest matters were correctly identified.					
7.	The planned timings were adhered to.					
8.	The number of QS which the event counted for was appropriate given the content.					

9.	Where the QS was interactive it included opportunities for all to interact.					
10	If required it was apparent that the students had prepared.					
Practicalities:						
11.	The tutors' delivery was well structured, clear and engaged the attendees.					
12.	There were no practical problems with the venue, equipment etc.					
13.	The number of students attending did not exceed the planned places available.					
14.	There was opportunity for delegates to interact with practitioners.					
15.	The materials supported the intended learning aims.					
16.	The cost of the event was appropriate.					
General:						
17.	The content of the QS was set at a level that attendees appeared to be able to engage with.					
18.	The QS succeeded in achieving an environment conducive to learning.					
19.	Are there ways in which the QS could be improved? <i>Please provide your thoughts in the space opposite.</i>					

20.	Did you observe any examples of particularly good practice? <i>Please provide your thoughts in the space opposite.</i>	
Please use this space to comment on any aspect of the QS you attended. If you disagreed with any of the statements above it would be helpful to have some further information.		

Observer Name (capitals please): _____

Internal or External: _____

Signed: _____ Date: _____

For Office use only:

Inn's Response	Date:

ANNEX IV - COMMON STUDENT FEEDBACK QUESTIONS

Drafting note - the platform which is used to distribute the survey forms will include a link to the description information which was provided for students at the point of booking. This will include the title, a description of the event and the learning aims for it.

Please indicate the extent to which you agree with the following statements.	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
There will be an opportunity for you to comment further at the bottom of this form.					
The title of the QS gave a clear indication of the content.					
The QS followed the description of what was scheduled to happen.					
The environment was conducive to learning.					
The QS gave the opportunity for me to engage with practitioners and/or experts.					
Please indicate your feeling about the level at which the QS was delivered below.	Too advanced for me	About right for me	Too low for me		
Please choose one of the above.					

Wording will be inserted below which relates specifically to the learning aims that have been set for each QS.

Please indicate to which extent, having attended this QS, you agree with the following statements.	To a great extent	To some extent	To a small extent	Not at all	

Please use this space to comment on any aspect of the QS you attended. If you disagreed with any of the statements above or if you feel that your skills or knowledge were not enhanced as a result of attending it would be helpful to have some further information.

The Inn reads and considers all feedback received with a view to ensuring it provides the best experience possible for students attending QSs.

ANNEX V - ROLE DESCRIPTION AND PERSON SPECIFICATION FOR EXTERNAL OBSERVER

External Observers (EOs) are appointed by the Council of the Inns of Court (COIC) on behalf of the four Inns of Court (the Inns). EOs will provide constructive feedback regarding the provision of Qualifying Sessions (Qs) with a view to identifying areas of best practice and areas for improvement for inclusion in an annual report.

The Inns of Court and Qualifying Sessions

Qs form a vital part of a student's journey in training to become a barrister. All Bar students are required to be members of an Inn. Qs, provide opportunities for professional and ethical development which complements and builds on a student's academic and vocational education and forms a bridge to the final component of Bar training; pupillage. Qs also provide opportunities for a student to enhance their understanding of the role of barristers in the wider justice system and the rule of law.

Qs deliver high quality education in a context where those learning are exposed to the Inns' community of practitioners and experts thereby reinforcing their learning. The Qs come in many forms including on-line, in-person and residential events.

The Role

EOs will be assigned to observe Qs delivered by an Inn for a period of one academic year. At the end of each year EOs will rotate to observe the Qs of a different Inn. The post is offered for an initial term of 4 years with possible renewal for a further 2 year term. There will be a review of the EO's performance in the role after the first academic cycle.

It is envisaged that the attendance requirement will be equivalent to 7 days over the course of each academic year. EOs will produce feedback reports after each QS event attended and an annual year-end report (templates will be provided). EOs will also meet with students to gather feedback on the QS programme as a whole both at the start and at the end of the academic year.

Attendance will be required at an induction programme which will normally be held in either September or October in the first year of appointment. This initial induction programme will include sessions collectively with both EOs and individually with the Inn the EO is assigned to.

In each subsequent year the EO will attend induction sessions just at the new Inn they are assigned to.

Accountability

Accountable to: the Nominated Officer of COIC

Key Relationship: the Nominated Officer at the respective Inn

Role Description

- To observe and provide independent and impartial feedback on a cross section of Qs reflecting a range of themes and delivery formats.
- To be familiar with the Inn's most recent annual Self-evaluation Report, which will include previous EO annual reports and to be aware of actions taken in response to recommendations made.
- To attend a cross section of 4 Qs events during each academic year as well as one weekend residential course.
- Towards the start and end of the academic cycle to chair a meeting of students, the aim being to provide a supportive environment within which student expectations and experience can be considered and to gather general feedback. A report of these meetings to be provided within 10 days of each.
- To write reports of observations and student feedback including evidenced, constructive and proportionate recommendations and to deliver these to the Inn within 10 days of the event.
- To submit by the end of June each year an annual report to the Inn. This report will inform the Self-evaluation Report which the respective Inn will submit annually to the Bar Standards Board.
- To provide feedback to COIC on the EO process.
- To meet the requirements and deadlines agreed with the Inn and to maintain open and regular communication with its nominated members of staff.
- To be aware of and be able to reference the four BSB principles underpinning Bar training and the components of the BSB Professional Statement.

Person Specification

The External Observer:

- is able to demonstrate a good understanding of quality assurance mechanisms;
- has an awareness of the regulatory landscape;

- has direct experience of a profession where skills training is a key element of the operational workings;
- will comply with the Inns' and COIC rules relating to data protection;
- is able to maintain independence and to identify and take appropriate action in dealing with conflicts of interest and maintain confidentiality where appropriate;
- can evidence, through personal and/or professional development, an understanding of the principles around equality, diversity and inclusion and the risks of unconscious bias;
- has experience of writing reports for committees or Boards;
- has a track record of putting views across clearly, constructively and sensitively taking into account responsibilities and expertise of others;
- has a track record of fostering collaborative relationships built on trust and respect;
- has the ability to facilitate group discussions;
- has the ability to work to deadlines;
- is willing and able to attend QS events during the evening and over the course of weekends in locations across the country.

Remuneration

EOs will receive an annual fee of £2,450 payable in three instalments:

- £820 upon completion of the induction programme and the first student meeting and delivery of the student meeting report to the Inn;
- £815 after attendance at a residential event and delivery of the related report to the Inn;
- £815 once the minimum number of Qs have been observed, the second meeting with students has been conducted, and all feedback reports and the annual report have been submitted.

It is estimated that on average EOs will attend 1 day of induction, 4 evening Qs, two student meetings and a 2 ½ day residential weekend. We calculate this to be the equivalent of 7 days of attendance.

All reasonable travel and subsistence costs will be met in accordance with each Inn's policies. Ordinarily only standard class travel and budget accommodation will be reimbursed.

ANNEX VI – STUDENT MEETING FEEDBACK FORM

Inns' External Observers Student Meeting Feedback Form

To be completed and delivered to the Inn within 10 days of the student meeting.

Once completed please forward this form to _____.

Name	
Inn of Court	
Meeting held at the start or end of the academic year. Please delete as appropriate.	Start / End
Date Meeting Held	
Number of Students Attending	
Bar course providers represented	

Meeting at start of Academic Year	
1.	Arrangements prior to the Qs: choice and availability of sessions, booking process, clarity on what to expect.
2.	Practicalities: venues, materials, tutors, matters related to delivery on-line or the use of a hybrid model. Is there a range of choices? Are joining/attendance instructions clear?
3.	Learning: are the learning aims for the sessions clear?
4.	Interaction with practitioners: what are the expectations?
5.	Interaction with Inn staff: how has this been?
6.	Additional comments made by students.

Meeting at end of Academic Year	
1.	Arrangements prior to the Qs: choice and availability of sessions, booking process, clarity on what to expect.
2.	Practicalities: venues, materials, tutors, matters related to delivery on-line or the use of a hybrid model.
3.	Learning: did attendance enhance skills and/or knowledge.
4.	Interaction with practitioners: did this enhance the experience.
5.	High points and low points.
6.	Overall how were Qs as compared to what was expected.
7.	Additional comments made by students.

For Office use only:

Inn's Response	Date:

ANNEX VII – EO ANNUAL REPORT TEMPLATE

Inns’ External Observers Annual Report Form

The Inns have received the feedback you have provided after each of the QS events you have attended. In addition feedback has been received relating to the meetings you have held with students. Now that you have completed a whole academic cycle with your Inn we would like to hear your overall thoughts. We are keen to understand where improvements could be made and also to hear about examples of good practice you observed as set against the quality assurance mechanisms put in place by the Inns in conjunction with the BSB.

This report will inform the Inn’s Self-evaluation Report which will be shared with the other Inns and COIC. An overview of the four Inns’ reports will be produced by COIC and this, along with the individual Inn reports, will be submitted to the BSB.

Should there be matters which you would like to discuss prior to inclusion in this report please contact either the nominated person at your Inn or Joanna Robinson at COIC.

Name	
Inn of Court	
Other periods in the EO post ie. Name of Inn and dates.	

Could you please provide your overall impression of the following.

Content	
1.	The quality of the educational content delivered through the QSs attended and their role as providing a bridge to the community of practitioners.
2.	The effectiveness of the contribution of the Inn members and external experts who participated in the educational and the collegiate elements of the QSs.
3.	Appropriateness and accuracy of the learning aims that were set for the QSs.
4.	Perception of the students’ engagement with the QSs.
Practicalities	
5.	Organisational arrangements eg. venues, materials, matters related to delivery on-line or the use of a hybrid model etc.

Your Experience	
6.	Areas of good practice identified.
7.	Recommendations for improvement.
8.	The effectiveness of the QS quality assurance mechanisms in general and the role of the EO specifically.
9.	Risks or contributions to the attainment of the four principles of Bar training ie. flexibility, accessibility, affordability and maintenance of high standards.
Your Role	
10.	Areas where you feel more support is needed for EOs.
11.	Evidence that recommendations made by previous EOs had been taken on board.
12.	Please do add in any other comments you would like to make.

We thank you for the time you have taken to produce this report. Your comments will assist us to further develop the Qualifying Session programme provided by the Inns and the associated quality assurance mechanisms.

For Office use only:

Inn's Response	Date:

The Council of the Inns of Court

9 Gray's Inn Square,
London WC1R 5JD
T: 020 7822 0760
E: info@coic.org.uk

Limited by Guarantee

Company Number: 8804708
Charity Number: 1155640

Registered Office:
9 Gray's Inn Square, London WC1R 5JD

Annex 2

Joint Inns' Education and Qualification Rules

INTRODUCTION

1. The Joint Inns' Education and Qualification Rules set out the requirements for the Inns in respect of educational and qualification matters and take full account of the following, the contents of which are not repeated here:

- the Memorandum of Understanding between the Inns of Court and the Bar Standards Board (BSB) (the MoU) and its annexes;
- the BSB Handbook Part 4 Qualification Rules;
- the Bar Qualification Manual and
- the Authorisation Framework.

2. Student members of an Inn are subject to these supplementary rules and the standing orders of their Inn.

3. Membership data are shared between the Inns in compliance with the data protection policies of the Inns and the inter-Inn Data Sharing Protocol.

4. Membership data are shared between the Inns and the BSB in compliance with schedule 3 of the MoU ie. the Data Sharing Protocol, and the [BSB's Privacy Notice](#).

ADMISSION

5. The requirements for admission to the Inns of Court are set out in the MoU, in schedule 1 of the MoU (the Guidelines for determining if a person is fit and proper to become a practising barrister) and the Bar Qualification Manual. In short applicants must:

- a) meet the academic requirements set out in paragraph 8. below and
- b) be fit and proper in accordance with schedule 1 of the MoU.

An Inn must admit an applicant who has completed all required processes, is eligible for admission and has paid any prescribed fee.

6. Inn membership must be secured prior to the start of the vocational component of Bar training. Applications for admission should be made at least 12 weeks prior to the start of the vocational component of training. Where the vocational component is split into two parts applications for admission should be made at least 12 weeks prior to the start of Part 2. The Inns may accept applications within 12 weeks of the start of the vocational component but cannot guarantee that they will be processed in time. Further detail regarding the different training pathways can be found in the BSB's Authorisation Framework.

7. Persons undertaking an apprenticeship pathway of training for the Bar will be dealt with on a case by case basis by the BSB who will determine the date by which they must be a

member of an Inn. Those in this position should apply for Inn membership at least 12 weeks prior to this date.

8. To apply for Inn membership (admission to the Inn), an applicant must either be:

- a) studying a law degree which includes the foundations of legal knowledge and skills associated with graduate legal work as set out by the BSB; or
- b) studying on, or have been accepted onto, a course (e.g. Graduate Diploma in Law (GDL)) which includes the same knowledge and skills as set out in a) above; or
- c) have been exempted from, or have successfully completed, the academic component of training.

9. Certified copies of degree or conversion course certificates or proof of study on a degree or conversion course or the relevant waiver documentation from the BSB will be required at the point of application for admission.

10. Degree and conversion course qualifications older than 5 years are considered stale for the purposes of admission to an Inn and Bar qualification. Applicants with stale qualifications will need to seek advice from the BSB as to what action they will need to take to reactivate their qualifications. Note: Law degrees started before the 2019/20 academic year are required to be 'Qualifying Law Degrees' i.e. QLD; specific requirements can be found in the Bar Qualification Manual.

11. The fee for admission to an Inn will be determined by the individual Inn and will be reviewed annually. It will be published on the Inn's website along with the cost of other activities associated with Call to the Bar.

12. Applicants must provide to their Inn a completed Admission Declaration as prescribed by the BSB. The Inn may ask for additional information.

13. Applicants must provide certified copies of identity documentation upon application for admission. The requirements for this, and associated guidance, will be set out in the admission information on the Inns' websites.

14. Student members will be required to commence the vocational component of training for the Bar within six years of admission to an Inn. Student members will be required to complete the vocational component within five years of commencing the vocational component. Inn membership will cease for those student members not complying with this requirement except when they have made a successful application to the Inn for the relevant time limit/s to be extended. Consideration will only be given to extending the time limits in cases where there are clear plans to commence and complete the vocational component of qualification within any BSB prescribed time limits.

15. Student members will be required to be Called to the Bar within 5 years of completion of the vocational component. Inn membership will cease for those students not complying with this requirement except when they have made a successful application to the Inn for the relevant time limit/s to be extended.

16. Student members who have ceased to be a member of an Inn may be admitted to another Inn or to the Inn of which they had ceased to be a member. If student members have been expelled by determination of the Inns' Conduct Committee, readmission will not be considered by an Inn until the penalty period set by the Inns' Conduct Committee has elapsed.

17. Persons who have been disbarred by their Inn or who have been voluntarily disbarred may only be readmitted by their original Inn of Call. Those seeking readmission must provide their Inn with a completed Readmission Declaration as prescribed by the BSB. The Inn may ask for additional information.

18. Transferring lawyers will be required to obtain the necessary authorisation from the BSB before they can apply for admission to an Inn.

19. Transferring lawyers will be required to complete all requirements for Call as set out by the BSB within 2 years of admission to an Inn. Those not complying with this requirement will be removed from Inn membership except when there has been a successful application to the Inn for the relevant time limit to be extended. Consideration will only be given to extending the time limit where there are clear plans to complete the requirements within the BSB's prescribed time limits.

20. An Inn may admit members of another Inn who have been Called to the Bar (Ad Eundem members). Prior to admission the admitting Inn will seek confirmation that the applicant is a member in good standing at their Inn of Call and will require the applicant to declare that there are no previous or pending disciplinary or conduct issues against them. The admitting Inn may prescribe a fee.

21. Once a student member has started the vocational component of training for the Bar, they are only able to withdraw from membership of an Inn of Court to join an alternative Inn in exceptional circumstances. In such cases, they must advise their original Inn in writing and ensure that there is no gap between ending the membership of their first Inn and being admitted to the new Inn.

QUALIFYING SESSIONS

22. The rules governing Qualifying Sessions are set out in the MoU, in schedule 2 of the MoU (the Framework for the provision of Qualifying Sessions), the BSB's Handbook Part 4 Qualification Rules and the Bar Qualification Manual.

23. The Inns have agreed a joint protocol covering the awarding of waivers and modifications for attendance at Qualifying Sessions. This can be found at Annex A. Applications for waivers or modifications for Qualifying Sessions must be submitted to the Inn's Nominated Officer using the form prescribed by the Inn.

24. Each Inn will produce a programme of Qualifying Sessions including those held at the Inn, those held at venues hired specifically for Inn events and those held at venues on the Circuits outside the south-east.

25. Qualifying Sessions may be offered in collaboration with one or more Inn, Circuit or with other providers.

26. All Qualifying Sessions, including those delivered in collaboration with others, must fit within the Framework for the provision of Qualifying Sessions and must comply with agreed quality assurance mechanisms.

27. Student members may count up to 5 Qualifying Sessions attended 'on Circuit' for the purposes of Call to the Bar. Qualifying Sessions gained by attendance at Inn residential events are not classed as events 'on Circuit'. The South-Eastern circuit is not considered to be 'on Circuit' for the purposes of the Framework for the provision of Qualifying Sessions.

28. Student members may attend more than one Qualifying Session with the same content, but the Qualifying Session will only be counted once for the purposes of Call to the Bar.

29. Student members whose membership of an Inn has ceased and who go on to join another Inn will be permitted to count Qualifying Sessions attended at their original Inn for the purposes of Call to the Bar if these were completed under the Framework for the provision of Qualifying Sessions as set out in the MoU between the Inns and the Bar Standards Board. Where a Qualifying Session has the potential to cover more than one theme the Inn who delivered the Qualifying Session will identify which theme applies.

CALL TO THE BAR

30. A barrister is defined in the Legal Services Act 2007 as an individual who has been Called to the Bar by one of the Inns of Court and who has not been disbarred by one of the Inns of Court. To be Called to the Bar by an Inn a person must be a member of that Inn.

31. The rules governing Call to the Bar are set out in the MoU, schedule 1 of the MoU (the Guidelines for determining if a person is fit and proper to become a barrister), schedule 2 of the MoU (the Framework for the provision of Qualifying Sessions), the BSB's Handbook Part 4 Qualification Rules and the Bar Qualification Manual.

32. Applicants must provide to their Inn a completed Call Declaration as prescribed by the BSB. The Inn may ask for additional information.

33. All those to be Called from 1st July 2021 will be required to undergo a UK Standard Disclosure and Barring Service check and (where relevant) the international equivalent/s. Further details on this process can be found on the BSB website and will be provided to those seeking to be Called by their Inn.

34. There are normally four official Call publication dates each year. These are as follows:

- a) Hilary Term – the third Thursday in March;
- b) Trinity Term – the fourth Thursday in July; and a second, deferred Trinity Call on the second Thursday in October; and
- c) Michaelmas Term – the fourth Thursday in November.

The Inns may agree between them additional official Call publication dates in any given year. Agreement to add an official Call publication date does not mean that each Inn is required to hold a Call ceremony on or around that date and it is for each Inn to determine the necessity for doing so.

35. Additional Call ceremonies may be held by an Inn if, for example, the number of student members to be Called exceeds the capacity of an Inn. Call ceremonies will normally be held within 10 days of the prescribed Call publication date. In such circumstances, the date of the Call will then be recorded on Call certificates as that of the official Call publication date not the actual date of the additional Call ceremony.

36. In exceptional circumstances Inn members may be Called on an ad hoc basis. In these cases the date of the actual Call will be recorded on the Call certificate.

37. Student members are required to attend Call in person. A joint protocol covering the awarding of waivers of this requirement has been agreed by the Inns. This can be found at Annex A. Applications must be submitted to the Inn's Nominated Officer using the form prescribed by the Inn.

38. The Inns will publish the names of all of those who are Called to the Bar.

39. The fee applicable for Call to the Bar shall be determined by the individual Inn and will be reviewed annually. It will be published on each Inn's website along with the cost of other activities associated with Call to the Bar.

40. All those Called on the same date shall rank in order of seniority from their date of admission to the Inn.

41. The rules for the awarding of temporary Call are set out in the BSB's Handbook Part 4 Qualification Rules. Each Inn's process for the awarding of temporary Call can be found on their websites. An Inn will Call a successful applicant for temporary Call as soon as is practicable.

42. Applicants for temporary Call must provide to their chosen Inn a completed application for temporary admission and Call as prescribed by the BSB. The Inn may ask for additional information.

FEEDBACK AND COMPLAINTS

43. Complaints relating to the Inns' education and qualification activities should be directed to the Inn concerned. The complaints received will be reviewed annually as part of the production of the Inn's Self-evaluation Report for the BSB.

EQUALITY, DIVERSITY & INCLUSION

44. The Inns are committed to ensuring that the promotion and advancement of equality forms an integral part of its policies and practices.

45. Each Inn will complete Equality Impact Analyses for their programmes of Qualifying Sessions.

PUBLICATION & REVIEW

46. The Inns will publish this set of rules on their websites.

47. The Inns will review the workings of this set of rules annually through meetings of the Inns' Directors of Education and COIC.

48. The Inns will individually produce an annual Self-evaluation Report covering those areas set out in the MoU between the Inns of Court and the BSB. The Inns will collaborate with COIC in the production of an overview report to be submitted to the BSB.

EFFECTIVE DATE & TRANSITIONAL ARRANGEMENTS

49. Subject to the transitional provisions set out in Table 1 & Table 2 below, these rules come into effect on 1 January 2020 (as amended on 1 December 2022 and further amended on 1 October 2023).

Table 1: Qualifying Session (QS) Transitional Arrangements	Applicable Qualifying Session Rules	Guidance Notes
a) Student members starting the Bar Course* before 1 June 2020 and being Called no later than 30 June 2021.	Those QS rules that were in effect prior to 1 January 2020 apply. The QS Framework does not apply.	Note that, for example: <ul style="list-style-type: none">- 12 QSs must be completed;- there is no requirement to complete QSs within 5 set themes;- there is no requirement to complete 2 interactive QSs;- the event linked to Call can be counted as a QS.

		<ul style="list-style-type: none"> - QS attended prior to 1 June 2020 can be used for the purposes of Call to the Bar.
<p>b) Student members starting the Bar Course* before 1 June 2020 and being Called on 1 July 2021 or later.</p>	<p>These QS rules and the QS Framework apply save that:</p> <ul style="list-style-type: none"> - there is no requirement to complete QSs within the set 5 themes (QS Framework para 7); - there is no requirement to complete 2 interactive QSs (QS Framework para 7). 	<p>Note that under these rules & the QS Framework:</p> <ul style="list-style-type: none"> - student members are required to complete 10 QSs (QS Framework Para 6); - the event linked to Call cannot be counted as a QS (QS Framework Para 14). - QS attended prior to 1 June 2020 can be used for the purposes of Call to the Bar.
<p>c) Student members starting the Bar Course* on or after 1 June 2020 who have not attended QSs prior to that point.</p>	<p>These rules and the QS Framework apply.</p>	<p>Note that, for example:</p> <ul style="list-style-type: none"> - 10 QSs must be completed (QS Framework Para 6); - QS must be completed within 5 set themes (QS Framework para 7); - 2 interactive QSs must be completed (QS Framework para 7); - the event linked to Call cannot be counted as a QS (QS Framework Para 14).
<p>d) Student members starting the Bar Course* on or after 1 June 2020 who have attended QSs prior to that point.</p>	<p>These rules and the QS Framework apply save that:</p> <ul style="list-style-type: none"> - there is no requirement to complete QSs within the set 5 themes (QS Framework para 7); - there is no requirement to complete 2 interactive QSs (QS Framework para 7). 	<p>Note that under these rules and the QS Framework:</p> <ul style="list-style-type: none"> - student members are required to complete 10 QSs (QS Framework Para 6); - the event linked to Call cannot be counted as a QS (QS Framework Para 14). - QS attended prior to 1 June 2020 can be used for the purposes of Call to the Bar.
<p>e) Transferring Lawyers who receive approval for their transfer from the BSB prior to 1st September 2020.</p>	<p>Those QS rules that were in effect prior to 1 January 2020 apply. The QS Framework does not apply.</p>	<p>Note that, for example:</p> <ul style="list-style-type: none"> - the number of sessions is normally reduced to 6; and these may be

		completed within 3 years of qualification.
f) Transferring Lawyers who receive approval for their transfer from the BSB from 1 September 2020.	These rules and the QS Framework apply.	
* 'Bar Course' for the purpose of these transitional arrangements shall be taken to mean either the Bar Professional Training Course, or the Vocational Component of Bar Professional Training or, where The Vocational Component is split into two parts, Part 2 of The Vocational Component.		

Table 2: Criminal Record Checks Transitional Arrangements	
All those being Called, including transferring lawyers, up to and including 30 June 2021.	Criminal Record Checks are not required.
All those being Called, including transferring lawyers, 1 July 2021 or later.	Criminal Record Checks are required.

Waivers and Modification of the Requirement to Attend Qualifying Sessions and Call Ceremonies

1. The Inns have agreed that the process and criteria below are applicable when considering applications to waive or modify Qualifying Sessions or waive the requirement to attend Call Ceremonies, in accordance with the Memorandum of Understanding, schedule 2 of the MoU (the Framework for the provision of Qualifying Sessions) and the Bar Qualification Manual. The requirement to undertake Qualifying Sessions and attend Call Ceremonies applies to all candidates for Call, including transferring lawyers, except those seeking temporary Call.

Waivers for Student Members & Transferring Lawyers

2. A waiver will remove the requirement to attend one or more Qualifying Sessions and/or the Call Ceremony.
3. Qualifying Session waiver applications will not normally be granted where there are further opportunities to attend Qualifying Sessions, unless paragraph 4 applies.

Waivers for Transferring Lawyers Only

4. Transferring lawyers who believe their previous experience means they have obtained the requisite level of skill and/or knowledge required in one or more of the Qualifying Session themes as set out in the Framework for the provision of Qualifying Sessions may apply to have attendance at Qualifying Sessions related to those themes waived.

Modification

5. A modification will alter the requirements for successfully completing a Qualifying Session that was attended by the applicant. For example, to disregard partial attendance/late arrival at a Qualifying Session or treat as within the time limit a Qualifying Session that was completed outside the time limit (ordinarily to be completed within the 5 years prior to the date of Call).
6. When deciding whether to grant a request for modification in the event of partial attendance/late arrival consideration will be given as to whether the applicant has been able to take part in the substance of the Qualifying Session and whether therefore it has been possible for the learning outcomes to have been met. If an event contains a number of Qualifying Sessions (such as a residential weekend) the number

of Qualifying Sessions awarded may be reduced proportionately to the outcomes not met.

7. When deciding whether to treat Qualifying Sessions falling outside the time limit as within the time limit consideration will be given to a range of factors including, but not limited to, how long outside the time limit the Qualifying Sessions are, how many of the Qualifying Sessions were completed within the time limit and whether Qualifying Session/s are outside the time limit due to factors beyond the applicant’s control.

Applications

8. Waivers and modifications will only be granted in exceptional circumstances and when supported by documentary evidence.
9. Applications for waiver or modification are to be made using the form prescribed by the Inns for consideration by the Nominated Officer of the applicant’s Inn.
10. Appeal against the Nominated Officer’s decision will be made to the Treasurer of the applicant’s Inn or their representative(s). Applicants may ask the Bar Standards Board to review the decision of the Treasurer.
11. Normally consideration will only be given to waiving or modifying a maximum of two Qualifying Sessions.
12. Examples of exceptional circumstances are set out below: (the table is not exhaustive).

	Event	Evidence Required
a.	Severe transport disruption	National news report; travel document etc.
b.	Medical condition (self or dependant)	Doctor’s certificate or supporting statement
c.	Bereavement	Supporting document/statement
d.	International visa/travel difficulties	Supporting document/statement
e.	Other compassionate reason	Supporting statement

13. Inns may request further information in support of the waiver or modification application.

14. Applicants may be required to attend the Inn to explain why they seek a waiver or modification.
15. In cases where requests for waiver or modification are not granted the Inn will consider refunding the cost of the event to the applicant.

Annex 3

Expenses Policy

The Inns' External Observers (EOs) can claim the cost of expenses incurred when attending events for the Inns. This document sets out the rules and procedures for claiming reimbursement.

- All claims for expenses will need to be made on the approved claim form (as attached). Copies can be obtained from the Inn to which the EO is assigned.
- Original receipts should be retained and attached or scanned in with the claim form.
- Expense claims will need to be submitted within 1 month of the date on which the expense was incurred.
- Expenditure will be reimbursed to EOs by BACS payment.
- Travel expenses will be refunded to those travelling from within the UK only unless authorised by the Inn in advance.
- One claim should be submitted for each individual trip/occasion.

Rail/Coach Travel

EOs are expected to plan ahead and take advantage of advanced booking and other concessions whenever possible. EOs are encouraged to make use of public transport where available taking into account issues of adequacy, reliability, safety and physical ability.

EOs may travel first class only if they are prepared to meet the difference between the First Class and the cheapest Advanced Standard Class fare at their own expense.

Should an event run so long such that the specified time of travel associated with an advanced booked ticket is missed, then any additional cost incurred may be claimed. Receipts for the original and subsequent ticket purchase must all accompany the expense claim.

Should an event run short additional expense incurred in travelling earlier than the specified time on an advanced booked ticket will not be reimbursed.

Use of Taxis

Taxis will only be reimbursed between the venue and the nearest station where public transport is not available.

If for any reason the normal route home is affected the Inn may refund other expenses incurred. This could include the use of taxis.

If there is a valid reason for taking any other taxis this must be approved in advance eg. disability, pregnancy or public transport not being readily available.

Air Fares

In the event of air fare being the cheaper mode of travel, the Inn has discretion to reimburse these costs, however EOs must seek approval from the Inn before booking.

Using own car

EOs who use their own vehicles for travel to and from the venue may claim reimbursement as set out below:

Mileage should be calculated from the home base with the departure and destination detailed on the claim form. Expenses incurred will be reimbursed using the HMRC approved mileage rates ie. for the first 10,000 business miles in the tax year 45p per mile and then 25p for each business mile over 10,000.

The EO should ensure that their insurance cover extends to business use and the insurer should, if necessary, be asked to endorse the certificate to confirm that occasional business use is covered by the insurance policy.

COIC will not accept liability for any injury or damage arising from the use of private motor vehicles while on business occasions.

Use of a motorcycle

Should a claimant use a motorcycle for travel then the procedure for use of a car applies except that an allowance of 24p per mile can be claimed. As with car use the EO should ensure that the appropriate insurance arrangements are in place.

Car Parking/Tolls/Congestion Charge

Parking is currently free at the majority of venues used for Qualifying Sessions. To park at one of the Inns please contact the relevant Inn to make arrangements. Parking fees incurred, excluding any parking fines or other penalties, can be claimed provided an original receipt is produced.

Out of pocket expenses

EOs may claim the cost of small out of pocket expenses where it is not normally possible to obtain receipts. Examples of such expenses are parking meters (but not fines), tube travel where an oyster card is used and rent-a-bike charges. All items claimed should be itemised and described fully on the claim form.

Subsistence

Food/drink costs while travelling may be claimed for actual expenditure within maximum limits as follows.

- Journeys over 90 mins in duration: Beverage/Snack £5
- Journeys at a time when a meal would normally be taken: Breakfast - £10, Lunch - £15, Dinner - £25
- The total amount claimed for any 24 hour period must not exceed £50.

Where a meeting or event is scheduled for a whole day and lunch is not provided lunch to a maximum of £15 may be claimed. Where a meeting or event necessitates an overnight stay and dinner is not provided a maximum of £25 may be claimed for dinner and £10 for breakfast.

Accommodation

It may be necessary to stay overnight when attending an Inn event. The Inn will book accommodation, or will provide details of specific accommodation for the EO to book themselves, to ensure a low/reduced rate is obtained where possible. The Inn will confirm booking dates prior to travel. Accommodation will be provided only where it is not possible to arrive on time for an event in the morning or if it is not possible to return home at a reasonable hour after an event in the evening.

Bookings will usually be made on a Bed and Breakfast basis only. All extras must be settled on departure.

It may not always be possible for the room costs to be settled in advance. The EO will be notified in advance when this occurs and EOs will be required to settle the entire bill when checking out.

Prior authorisation should be sought from the Inn regarding EOs making their own arrangements.

The maximum reimbursement for a room will be £145 within central London and £105 outside of central London within the UK.

Where accommodation costs are saved by staying with friends, relatives or other hosts, an allowance of up to £25 per night may be claimed.

Expenses Claim Form

Name:	
Event & Date(s):	

For train / taxi travel

Details of receipts attached:	
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For travel by car/ motorcycle

Mileage rate being claimed ie. 45p or 25p.	
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Outward Journey:

Postcode of departure point:		Number of miles:		Cost of Mileage:	
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Return Journey:

Postcode of arrival point:		Number of miles:		Cost of Mileage:	
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Additional Expenses:

Item	Amount Claimed

Total amount claimed:	£
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Payment details:

Account holder:	
Sort code:	
Account number:	

Please return the form (with receipts where appropriate) by email/post to
XXXX, The Honourable Society of XXXX, London XXXX
someone@Inn.org.uk

Annex 4

Glossary of Terms

Below is a brief explanation of some of the terms you will become very familiar with during your time as an Inns' External Observer.

Bar Professional Training Course (BPTC): A one-year course that all those training for a career at the Bar must complete after their law degree or conversion course. This specific name will not be used for current courses after September 2020 but it is a term you may still hear. Course providers are now able to name their own courses.

Bachelor of Laws (LLB): The Bachelor of Laws (abbreviated LL.B. or LLB) is an undergraduate, or bachelor, degree in law offered in most common law countries as the primary law degree.

Bench: A senior member of the Inn. Often involved in the governance of the Inn.

Call to the Bar: The formal ceremony following completion of the Bar Course during which the Inn officially "Calls" people to the Bar. This signals the end of the academic stage of training to become a barrister. However, those Called may only refer to themselves as a barrister in certain situations. These are set out on the Bar Council's website.

Civil Law: You will hear barristers say that they practise in a "mixed civil" or "general civil" set. This means the area of practice of their Chambers is civil as opposed to criminal law, which includes employment, professional negligence, trusts and probate.

Chambers: Buildings in which barristers are based for private practice. Note: Chambers do not employ barristers; barristers in chambers are self-employed. Chambers are simply a collection of individuals who share an office space and accompanied costs, and who can use Chambers' name and reputation to help them build up their own practice.

Chancery Law: A practice area encompassing the following areas of work: banking; charities; civil fraud; company; consumer credit; financial services and regulation; insolvency (corporate and personal); intellectual property; land and real property; landlord and tenant; media and entertainment; pensions; probate and administration of estates; professional negligence; revenue and tax; trusts and settlements.

Conversion course: A one year course for graduates whose first degree isn't in law (or for those who have a law degree from a different jurisdiction). Some are referred to as the CPE (common professional examination), others as the GDL or PGDL (postgraduate diploma in law) but essentially these are the same thing.

CPD: Continuing Professional Development. CPD is the work undertaken with a view to barristers developing their knowledge and professional standards in areas relevant to their present or proposed area of practice. This is in order for them to keep themselves up to

date and maintain the highest standards of professional practice. During the first three years of practise, every barrister must obtain 45 CPD points each year. After that, there is no set minimum number of hours or points. CPD sessions are organised by the 4 Inns of Court, the Bar Council, some larger Chambers and private organisations.

CPE: *see conversion course*

Employed Bar: Around 20% of Barristers are employed by the Crown Prosecution Service, the Government Legal Service, solicitors' firms, private companies, local government and charities, rather than being self-employed and practising from Chambers. The Bar Directory contains a listing of barristers in employment and the posts they hold. There is a limited number of pupillage places at the Employed Bar. It is therefore quite common for students wishing to pursue a career at the Employed Bar to undertake pupillage in Chambers and then gain a permanent position at the Employed Bar. It is likely that the numbers of employed barristers will increase in the years to come.

First six and second six: Pupillage is usually divided into two distinct six-month periods. During the first six pupils assist their pupil supervisor but will not be able to appear in court by themselves. During the second six pupils may be able to take on small cases of their own but they remain under the supervision of their pupil supervisor. *Also see Third Six*

GDL: *see conversion course*

Independent Bar: This term is used to describe the practising Bar of England and Wales. Barristers are independent whether they work in private practice (i.e. based in Chambers) or for an employer ('the Employed Bar').

King's Counsel (KC) formerly known as Queen's Counsel (QC) – also known as 'Silk': Both experienced solicitors and barristers may apply to become King's Counsel, although the vast majority of KCs are barristers. KCs undertake work of an important nature and are referred to as 'Silks' which is derived from the specific type of gown that they wear in court.

LLB: *see Bachelor of Laws*

Marshalling: Shadowing a judge. This normally lasts a week. What exactly it entails varies from judge to judge but generally those undertaking this will sit beside the judge in court and observe proceedings. The judge will normally also show those sitting with them the case papers and discuss the case proceedings. As the experience provides a valuable opportunity to observe the workings of the court from an entirely different perspective, students pursuing a career at the Bar should take any opportunity to do marshalling.

Master of the Bench: *Also see Benchers.* The highest-ranking members of each of the Inns of Court are the Masters of the Bench. They are the governing body and are generally experienced members of the profession. They are elected to the position by other Benchers.

Mini-Pupillage: A mini-pupillage is a short period of work experience (usually one week) in a set of Chambers. Spending time in this way can provide an excellent insight into life as a barrister. Relevant mini-pupillage experience is essential for pupillage applications. Mini-pupils will generally shadow one or several barristers, maybe read the papers of the case they are currently working on, undertake legal research for them, accompany them to court etc.

Mooting: A 'moot' or 'mooting' is the oral presentation of a legal issue or problem i.e. a mock court case. In a moot, two pairs of 'advocates' argue a fictitious legal appeal case in front of a 'judge'. To win, participants do not necessarily have to win the legal case but must make the best presentation of their legal arguments.

OLPAS: This is the former centralised system of applying for pupillage (OLPAS = Online pupillage applications system). This has been replaced by the Pupillage Gateway at www.pupillagegateway.com. However, you will probably hear people refer to OLPAS or Pupillage Portal on occasion. *See also Pupillage Portal and Pupillage Gateway.*

PGDL: *see conversion course*

Pupillage: A 12-month 'apprenticeship' in Chambers or with an employer after the Bar course. Provided pupils compete this successfully they will be awarded the full practicing certificate by the Bar Council (i.e. they are now fully-qualified barristers) and will be free to build their practice or practise at the Employed Bar. *See also First Six and Second Six*

Pupillage Portal: The former online system by which students can apply for pupillage. This came after OLPAS but before the Pupillage Gateway, which was first introduced for the 2012 application round.

Pupillage Gateway: The new online system by which students can apply for pupillage, found at www.pupillagegateway.com. All pupillage providers must participate in Pupillage Gateway. Students can only apply for a set number of Pupillage Gateway pupillages in one application round. *See also OLPAS and Pupillage Portal*

Qualifying Law Degree: *see Bachelor of Laws*

Qualifying Sessions: In order to qualify for Call to the Bar, BPTC students must undertake 10 Qualifying Sessions organised by their Inn of Court. The Inns and the BSB have agreed a Framework which sets out the specific requirements for QS.

<https://www.barstandardsboard.org.uk/uploads/assets/479684ff-2d42-4ce5-a32b5bd6d9b1c277/mouschedule2-qsframeworkinns.pdf>

RCJ: Royal Courts of Justice

Scholarships: For many years each of the Inns of Court have sought to help their students financially. The funds they use come from their income, from generous Inn members and from other benefactors.

Silks: *see King's Counsel*

Squatting: The practice of staying in chambers after pupillage but not as a tenant. This can occur when there isn't a vacancy for the barrister to become a tenant in the Chambers. Unlike third six pupils, squatters are responsible for themselves rather than under the wing of a pupil supervisor, e.g. they are required to have their own insurance.

Sub or Under-Treasurer: The Chief Executive of the Inn.

Tenancy: This is the term given to a permanent position in Chambers. Pupils can apply for tenancies once they have completed their pupillage. *See also Tenants.*

Tenants: Barristers working within a particular set of chambers are self-employed and known as tenants. This term arises from the fact that tenants must pay "rent" to the Chambers – this covers the cost of renting the premises, utilities, insurance, wages of clerks and (if you are in a larger Chambers) HR staff, marketing costs etc.

Third six: After completing the traditional 12-month pupillage, you may be unable to secure a tenancy. For this reason some pupils find themselves becoming a third-sixer, i.e. continuing to work for a further six months in a similar vein to the second six. This can be either in the same or a different set of chambers. *Also see related First Six and Second Six.*

Treasurer: The Treasurer of the Inn is the most senior Bencher. Their term of office lasts one calendar year (apart from in 2020 due to COVID 19).

August 2024

Annex 5

Data-sharing protocol for the sharing and disclosure of information between

The Council of the Inns of Court (BTAS and the ICC)

And

The Honourable Society of The Inner Temple

And

The Honourable Society of The Middle Temple

And

The Honourable Society of Gray's Inn

And

The Honourable Society of Lincoln's Inn

Purpose

1. This document ('the Protocol') provides a framework for the collection, sharing, retention and destruction of information between the independent data controllers ('the parties'); the Council of the Inns of Court (COIC) through its disciplinary bodies and the four Inns of Court: Inner Temple, Middle Temple, Gray's Inn and Lincoln's Inn.
2. It provides a guide for members of the four Inns of Court about how their data might be shared amongst the Inns and with COIC (and vice versa), what data might be shared and the reason for the sharing. This protocol does not cover the relationship the Inns have with the ICCA as an authorised training organisation.
3. This protocol should be read in conjunction with the data protection policy and privacy notices of the Inns of Court and COIC. These can be found on the Inns' and COIC's websites as below. [Insert hyperlinks to privacy statements here.](#)
4. The sharing of personal data set out in this protocol is necessary to ensure that the Inns of Court have adequate regulatory oversight of their students, and that the responsibilities of COIC and the Inns, as set out in the Memorandum of Understanding with the Bar Standards Board, and the Inns' policies are complied with and that jointly held events and training are organised effectively.

Definitions

COIC – means the Council of the Inns of Court and includes the Inns' Conduct Committee and the Bar Tribunals and Adjudication Service.

Inns of Court – means each of the four Inns of Court; the Honourable Society of The Inner Temple, the Honourable Society of The Middle Temple, the Honourable Society of Gray's Inn and the Honourable Society of Lincoln's Inn.

Party – means one of COIC or the Inns

Parties – means more than one Party

Data controller – means a person who (either alone or jointly or in common with other persons) determines the purposes for which, and the manner in which, any shared personal data is processed

Data Processor in relation to shared personal data – means any person (other than an employee of the data controller) who processes the shared personal data on behalf of the data controller

Data Protection Officer – referred to as DPO throughout the document means the nominated individual within each party who oversees the party's processing of

personal data and ensures it is complying with its data protection obligations under the Data Protection Legislation, including the Data Protection Act 2018 (DPA) and the General Data Protection Regulation (GDPR).

Memorandum of Understanding – means the document agreed between the BSB, COIC and the four Inns of Court in relation to education and training for the Bar.

Processing – means any operation or set of operations which is performed on shared personal data or on sets of shared personal data, whether or not by automated means, such as collection, recording, organisation, structuring, storage, adaptation, or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction

Shared Personal Data – The personal data to be shared between the parties under Annex 1 of this agreement. ‘Personal data to be shared’ will be construed accordingly.

Risk and Security

5. The process of transferring personal data includes a risk of security breaches. However, this is mitigated by the robust security policies and measures which each party has in place. There is also a risk that we do not use the shared personal data in line with the UKGDPR requirements. This risk is mitigated by the parties upholding this protocol, their own commitment to handling personal data and their obligations within the MOU between the Inns, COIC and the Bar Standards Board.
6. The parties acknowledge that there is a risk in sharing data, but all parties have robust data protection policies and security measures in place and take their responsibilities for the security of personal data very seriously. The parties are sure that individuals can have confidence in the measures put in place and that the Inns, and COIC, have instituted data protection by design and default.
7. The parties are also committed to upholding their responsibilities under this agreement, the MOU and the current data protection legislation.
8. The parties agree to act as independent data controllers in respect of the data shared between Inns.
9. Annex 2 sets out the individuals who are the nominated Data Protection Officers/Leads (DPO) and therefore have responsibility to ensure that only those who require access to the shared personal data can have this.

The data to be shared

10. The parties agree that the shared personal data set out in Annex 1 is the least amount of personal data required to be shared to ensure the Inn is assured that their regulatory and membership functions are administered satisfactorily. This also sets out the purpose for which the personal data is shared between the parties.

11. The shared personal data collected and stored by each party is set out in Annex 1 and should be used for the stated purposes only, and in accordance with relevant statutory, regulatory, and policy provisions.
12. The Parties agree to inform individuals who provide their data which is shared under this Protocol of the existence of this protocol through their Privacy Notices and Data Protection Policies.

Retention

13. The parties will only retain shared personal data for as long as is necessary for the legitimate purposes for which the shared personal data is processed (which may be different for each party). This period is determined by the party's own data protection and/or data retention policies. Where retention periods have been agreed by the parties for specific categories of data these are set out in Annex 1.
14. Each party is responsible for ensuring that when those legitimate purposes come to an end, the shared data is securely deleted.
15. The parties are each responsible for ensuring that the data they hold is held securely and in line with current best practice and that the data is secure by design and default.

The Rights of the Data Subject, Monitoring & Complaints

16. The Data Protection Act provides the following rights for the individual data subject:
 - i. The right to be informed
 - ii. The right of access
 - iii. The right to rectification
 - iv. The right to erasure
 - v. The right to restrict processing
 - vi. The right to data portability
 - vii. The right to object
 - viii. Rights in relation to automated decision making and profiling.
17. Any requests pertaining to objection to processing, rectification, erasure, restriction and portability should be dealt with by the party that the data subject provided their data to. That party should inform the other parties when that request impacts on data that has been shared with them.
18. Individuals wishing to submit a subject access request should do so to each organisation they are seeking personal data from.
19. The parties sharing personal data will be responsible for monitoring that data and with which other parties it has been shared.

20. Any complaints about the way any of the parties have used personal data should in the first instance be directed to the parties' DPO.
21. The data subject also has the right to complain to the ICO if they are not satisfied with the way the parties use their information. The data subject can contact the ICO by writing to Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

Ad Hoc or one-off Data Sharing

22. It may sometimes be necessary for the parties to share data in a way not covered by this agreement. In this scenario the party will where possible inform the data subject about the processing, but it may be necessary to decide to share data quickly, in conditions of real urgency or in an emergency.

Signature

Date

Anne Sharp CBE

Under Treasurer of the Honourable Society of Lincoln's Inn

Signature

Date

Greg Dorey CVO

Sub-Treasurer of the Honourable Society of the Inner Temple

Signature

Date

Sir Christopher Ghika KCVO CBE

Under Treasurer of the Honourable Society of the Middle Temple

Signature

Date

Brigadier Stephen Cartwright

Under Treasurer of the Honourable Society of Gray's Inn

Annex 1 – the personal data to be shared

	The information to be shared	Purpose	Basis	How	When	Retention
1	Scholarships Data					
2	Applicants for Scholarships					
3	<ul style="list-style-type: none"> • Full names <p>Secondary data i.e. date of birth may be shared in the case of applicants sharing first and second names.</p>	To check that applicants for scholarships have only applied to one Inn (applying to more than one Inn is not permitted).	Legitimate interest	Password protected document from each Inn to the other Inns. Details of the mechanism used for the password protection of documents can be found at Annex 3.	Shortly after the deadline for applications has passed.	Deleted immediately after use.
4	Disciplinary Data					
5	Applicants for admission to an Inn who withdraw their application before admission having declared matters.					
6	<ul style="list-style-type: none"> • Name of applicant • Date of Birth • The category of matters declared (i.e. which question on the admission declaration they made a declaration under, but not the details of the declaration) or nature of report (i.e. what type of institution a report has been received from e.g. academic institution). 	To prevent applicants who have withdrawn an application after declaring matters which call into question whether they are Fit and Proper, or after information about them has become known to the Inn, applying to another Inn	Task in the public interest	Password protected document from each Inn to the other Inns.	After withdrawal of application.	To be kept by the 4 Inns in line with their individual retention policies which would ordinarily be for the assumed lifetime of the applicant unless and until they have been admitted by an

		without making a full disclosure.				Inn of Court after being passed as Fit and Proper by the Inns' Conduct Committee, in which case the Inns apart from the Inn of admission will delete all data.
7	Applicants for admission or student members whose referral to the ICC results in no sanction being imposed.					
8	<ul style="list-style-type: none"> Name MyBar Number (if available) Date of birth Details of the disclosure or report which brought into question their status as Fit and Proper. Result of the ICC proceedings. 	To ensure that the Inn's records show that the applicant or Inn member is considered to be Fit and Proper.	Task in the public interest/legitimate interest	Password protected document from the ICC to the Inn concerned.	Within 7 days of the finding.	<p>To be kept by the Inn concerned for the assumed lifetime of the applicant.</p> <p>COIC will dispose of the data 3 years after the appeal period has expired.</p>
9	Applicants for Inn admission who are refused by the ICC.					
10	<ul style="list-style-type: none"> Name Inn applied to MyBar Number if available Date of birth Reason admission refused. 	To ensure all Inns are aware that applications from the individual may not be considered for the time	Task in the public interest	Password protected document from the ICC to the 4 Inns.	Within 7 days of the refusal being issued.	To be kept by the 4 Inns for the assumed lifetime of the applicant. Unless and until

	<ul style="list-style-type: none"> Time during which no further Inn application may be considered. 	prescribed by COIC.				<p>they have been admitted by an Inn of Court after being passed as Fit and Proper by the ICC, in which case the Inns apart from the Inn of admission will delete all data.</p> <p>COIC will dispose of the data 10 years after the appeal period has expired.</p>
11	Inn Members Suspended from or deprived of rights of membership of their Inn.					
12	<ul style="list-style-type: none"> Name Inn Length of suspension or deprivation Nature of suspension or deprivation. Date of Birth Date of Call 	To prevent a suspended or deprived member exercising those rights they are prevented from using at another Inn of Court.	Legitimate interest	Email by member's Inn to the other Inns.	When the rights of the member are deprived.	The Inn of Call will keep the data for the assumed lifetime of the applicant. The other Inns will keep the data for the length of the suspension or deprivation.
13	Student Members having Call denied and being expelled from the Inn.					

14	<ul style="list-style-type: none"> Name Inn Inn membership number Sanction imposed by the ICC Date of Birth 	To prevent a student applying to join another Inn without declaring they have previously been expelled from an Inn.	Task in the public interest	Password protected document from the ICC to the four Inns.	Within 7 days of the sanction being imposed.	<p>To be kept by the 4 Inns for the assumed lifetime of the applicant. Unless and until they have been Called after being passed as Fit and Proper by the ICC in which case the Inns apart from the Inn of Call will delete all data.</p> <p>COIC will dispose of the data 10 years after the appeal period has expired.</p>
15	Student Members having sanctions other than expulsion imposed by the ICC.					
16	<ul style="list-style-type: none"> Name Inn Inn membership number Sanction imposed by the ICC 	To enable Inns to keep the status of their members up to date. To enable Inns to appropriately schedule Call for members.	Task in the public interest	Password protected document from the ICC to the Inn of admission.	Within 7 days of the sanction being imposed.	<p>The Inn of admission will keep the data for the assumed lifetime of the applicant.</p> <p>COIC will dispose of the</p>

						data 6 years after the appeal period has expired.
17	Called Members having been disbarred or suspended from practising at the Bar.					
18	<ul style="list-style-type: none"> • Name • Inn • Inn membership number • Sanction imposed by BTAS • Date of Birth • Date of Call 	<p>To enable the Inns to keep the practising status of their members up to date.</p> <p>To prevent a suspended or disbarred member exercising those rights they are prevented from using.</p>	Task in the public interest	Password protected document from BTAS to the Inn of Call.	Within 7 days of the sanction being imposed.	<p>In the case of disbarment the data will be kept by the Inn in line with their individual retention policies which would ordinarily be for the assumed lifetime of the applicant.</p> <p>In the case of suspension the data will be kept for the length of the suspension with the Inn of Call keeping the data in line with their individual retention policy which is expected to be for the lifetime of the applicant.</p>

						BTAS will retain the data 'indefinitely' in the case of disbarment. In cases of suspension for more than a year they will dispose of the data after 10 years. In cases of suspension for less than a year they will dispose of the data within 6 years.
19	Applicants who withdraw, are refused admission, are expelled or disbarred and then are subsequently admitted.					
20	<ul style="list-style-type: none"> Name Inn Inn membership number if available. MyBar Number if available. Date of Birth Call date if available. 	To ensure Inns' records are correct.	Legitimate interest.	Password protected document from the relevant Inn to the other Inns.	Within 7 days of admission/readmission.	Deleted immediately after use.
21	Event Data					
22	Event attendee details where two or more Inns are hosting a joint event or where one Inn is hosting but each Inn is taking bookings for their members.					
23	<ul style="list-style-type: none"> Name 	Ensure the smooth running of	Contract	Password protected spreadsheet	Before the event.	In line with the Inns' own

	<ul style="list-style-type: none"> • Booking details (specific details to be determined by the host Inn). • Contact details • Dietary requirements 	the event, that bookings are honoured and to ensure the health and safety of guests.				retention policies.
24	Details of attendees at joint qualifying sessions					
25	<ul style="list-style-type: none"> • Name • Booking details (specific details to be determined by the host Inn). • Contact details • Dietary requirements 	To ensure attendees receive the correct qualifying session 'points' for attending an event.	Contract	Password protected document from the hosting Inn to the other Inns.	Within 7 working days of the event.	In line with the Inns' own retention policies.
26	Pupils' Advocacy Training					
27	<ul style="list-style-type: none"> • Name • Inn • Whether the training has been successfully completed and any associated information. 	To enable Inn membership records to show whether the person has successfully completed the training or if further training is needed when this training takes place at an Inn other than the Inn of Call.	Legitimate interest	Via email from the Inn holding the event to the other Inns who had members attend.	Within 7 working days of the event.	To be kept by the relevant Inns in line with their individual retention policies which would ordinarily be for the assumed lifetime of the member.
28	Other					
29	Complaints and Subject Access Requests					

30	<ul style="list-style-type: none"> Name Inn MyBar Number 	To enable responses to subject access requests and complaints to be as complete as possible.	Legal obligation	By Email from the Inn receiving the request to those Inns with whom it has shared relevant data.	Within 7 working days of receipt of the subject access request/complaint.	Review every 2 years after last contact and delete if no longer relevant.
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Data Protection Officers (DPOs)

The DPOs are responsible for data protection compliance within their organisation. The DPOs are the designated contacts for subject access requests, queries, or complaints.

Party	Data Protection Officer
COIC	COIC Director James Wakefield (jwakefield@coic.org.uk / 0207 8220 761)
Inner Temple	Membership Registrar Jude Hodgson (Jhodgson@innertemple.org.uk / 020 7797 8206)
Middle Temple	Date Governance Manager Sarah Cates (s.cates@middletemple.org.uk / 0207 427 4809)
Gray's Inn	Director of Finance Dermot Doughty (Dermot.doughty@graysinn.org.uk / 0207 458 7803)

Lincoln's Inn	Data Protection Officer Naomi Johns (data.protection@lincolnsinn.org.uk / 0207 405 1393)
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Annex 3

Transmitting and sending personal data

This protocol requires the sending of personal data to each organisation. This presents a risk to the subject in errors and accidents causing their personal data to be compromised.

Inn's staff who have responsibility for the administration of this protocol and the sharing of personal data will be required to read this guidance.

In sending personal data they should ensure that:

- The correct recipients address is in the TO line before pressing send.
- Personal data covered by this protocol should not be in the body of the email.
- No personal data should be in unprotected attachments.
- Personal data should be in password protected documents.
- Passwords should be sufficiently long and complex to prevent compromise.

When sending password protected documents by email Inn staff will advise the recipient in the body of the email to contact them via an alternative mechanism when they will be provided with the password for the document. The password must be kept securely.

Annex 6

Inns of Court External Observers

Chronology for Year 2 Onwards

Start of September	Meet with JR to talk about transition to the new Inn.
September	Staff from the Inn for the year will contact you to: <ul style="list-style-type: none">• arrange your Inn-specific induction.• talk about which Qs you will attend in the coming term (description information will be provided prior to each QS).• talk about how their programme of Qs is run and to decide between you how and when you will liaise over the course of the year.• provide the EO reports and self-evaluation reports for the past 2 years (you can request to see more if you wish).• talk about how the first of the two student meetings will be arranged.
October	Hold student meeting and provide feedback to the Inn using the template in the handbook at Annex X.
Autumn Term	Start to attend Qualifying Sessions providing feedback reports to the Inn within 10 days of each attendance using the template in the handbook at Annex X.
November	Attend a meeting with JR and the other EOs.
December/January	<ul style="list-style-type: none">• Liaise with Inn regarding QS schedule for the term(s) ahead.• Ensure weekend QS is booked in if not already attended.
Just prior to Easter	Attend a meeting with JR and the other EOs.
May	Attend a meeting with JR and the other EOs.
May or June	Hold the second student meeting and provide feedback to the Inn using the template in the handbook at Annex X.
By the end of June	Provide your annual report to the Director of Education at your Inn and JR using the template at Annex X.