



THE INSTITUTE
OF LEGACY
MANAGEMENT

Guide to ILM's Certificate in Charity Legacy Administration

What is CiCLA?

Welcome to CiCLA - the Certificate in Charity Legacy Administration provided by the Institute of Legacy Management (ILM) in partnership with the University of Law (ULaw).

CiCLA is a distance learning course that offers a fundamental awareness of Legacy Management for those wishing to gain a broad understanding of the principles of the profession. It is accredited by the University of Law using the Framework for Higher Education Qualifications (FHEQ) (rather than NVQs) and is a level 5 qualification. More information about FHEQ can be found in Appendix 1 at the end of this document.

Who is it for?

CiCLA is for anyone who would like to have a better understanding of legacy administration and knowledge - both for themselves and to be able to make a positive contribution to any legacy team. Although no prior knowledge or experience is required for this qualification, students must be a member of ILM to study CiCLA.

Which elements of legacy administration are covered?

CiCLA assesses the key elements of the legacy management profession. The six areas covered are:

- First Steps after Death
- Establishing Entitlement
- The Grant
- Powers and Duties of Personal Representatives
- Estate Accounts
- Particular Problems for Legacy Officers

How can I study for the qualification?

The course is distance-learning so it can be undertaken at your own pace, when and where you like. Each unit includes a set of self-assessment exercises to help you set the work in a practical context.

How long does the course take?

This depends on you! The course can be completed within 1 year but, because the course is based on distance learning, you can work at a speed which fits in with you and your other commitments. The intention is for CiCLA to be completed within 3 years.

When can I start the course?

As long as you are an ILM member, you may enrol on the course at any time – whenever suits you best – and start your CiCLA studies whenever you like.

How is CiCLA assessed?

Your CiCLA is divided into 3 levels comprising of six sections in total. Two sections are completed at each level:

- Level 1 assessment - Units 1 & 2
- Level 2 assessment - Units 3 & 4
- Level 3 assessment - Units 5 & 6

This means there are 3 assessments to complete. All are open book and you can do them at your place of work or at home. You have two weeks in which to complete each assessment.

- Level 1 is a 20 question multiple choice assessment.
- Level 2 and 3 are written assessments consisting of two scenario based questions.

The course materials are provided in two different formats: as a PDF with your initial welcome email from ILM and then in hard copy dispatched directly from ULaw to your preferred address. There are three assessment periods in any one calendar year, currently February, June and October. The dates are set in the preceding year by ILM in partnership with the University of Law.

A revision session is run prior to each assessment period for those students studying levels 2 and 3.

All CiCLA students will receive an email from ILM inviting them to register for the assessments and the revision sessions (where appropriate) approximately one month prior to an assessment period. The assessment and revision registration forms are held [here](#) in the CiCLA section of the Members' Section on the ILM website.

What is the pass mark to gain CiCLA?

CiCLA is marked as follows:

- Level 1: Candidates should ideally attain a minimum of 50% at Level 1 before moving on to Level 2¹.
- Level 2: minimum mark required is 18 out of 30.
- Level 3: minimum mark required is 24 out of 40.

To pass CiCLA, students must have a combined total of 42 out of 70 for levels 2 and 3.

Please note: *Level 1 marks are not included in the overall total mark.*

To gain a distinction, a candidate must achieve at least 80% (a mark of 56 overall) from levels 2 and 3.

Is any help available whilst studying for CiCLA?

ILM is delighted to offer a Mentor to every student signing up to take CiCLA. Mentors are suitably qualified or experienced ILM members or Corporate Partners.

Those deciding not to take advantage of a Mentor at the start of their CiCLA, can request a Mentor be assigned at any point during their studies.

What are the benefits of CiCLA?

At the end of the course, among other skills, you will:

- Be aware of the procedural steps which are taken when a person dies
- Understand the significance of a grant of representation
- Be able to distinguish assets which pass under a will from assets which pass independently of a will

- Recognise the circumstances in which a member of the deceased's family or dependants can challenge a will
- Be able to read a will and understand the effect of its main provisions
- Be aware of the powers and duties of executors of a will and the rights of beneficiaries
- Have an understanding of Inheritance Tax, Capital Gains Tax and Income Tax, and how charities' exemptions can be effectively used to increase benefit
- Understand the function, and be able to read a simple set of, estate accounts

ⁱThe Level 1 MCQs lay the foundation and provide a basic knowledge before candidates move on to the written scenario based questions.

Appendix 1

Descriptor for a higher education qualification at level 5 on the FHEQ:

- knowledge and critical understanding of the well-established principles of their area(s) of study, and of the way in which those principles have developed;
- ability to apply underlying concepts and principles outside the context in which they were first studied, including, where appropriate, the application of those principles in an employment context;
- knowledge of the main methods of enquiry in the subject(s) relevant to the named award, and ability to evaluate critically the appropriateness of different approaches to solving problems in the field of study;
- an understanding of the limits of their knowledge, and how this influences analyses and interpretations based on that knowledge.

Typically, holders of the qualification will be able to:

- use a range of established techniques to initiate and undertake critical analysis of information, and to propose solutions to problems arising from that analysis;
- effectively communicate information, arguments and analysis in a variety of forms to specialist and non-specialist audiences and deploy key techniques of the discipline effectively;
- undertake further training, develop existing skills and acquire new competences that will enable them to assume significant responsibility within organisations.

Holders of qualifications at this level will have developed a sound understanding of the principles in their field of study and will have learned to apply those principles more widely. Through this, they will have learned to evaluate the appropriateness of different approaches to solving problems. Their studies may well have had a vocational orientation, enabling them to perform effectively in their chosen field. Holders of qualifications at this level will have the qualities necessary for employment in situations requiring the exercise of personal responsibility and decision-making.