



## Revised guidelines on duration of assessments and interview sample sizes

These guidelines replace those published in the *Lexcel Assessment Guide*, 3<sup>rd</sup> edition, and *Lexcel: Helping Practices to Improve Profitability*.

### Duration of assessment

The total likely duration of assessment can be ascertained by adding the number obtained from Table 1 to the number obtained from Table 2 below. It is very unlikely that the length of assessments can be reduced at the bottom end of the scale. All of the time estimates given below are guidelines only and are not prescriptive.

Please note that the duration for AMV's (annual maintenance visits) is approximately half that of an initial assessment. In order to maintain the duration guidelines for AMV's, the Interview Sample Size Guidelines will be approximately half the percentage stated in Table 3 below. Please note, the case file sample (Table 4) for an AMV will be reflective of the reduced interview sample.

**Table 1: Duration indicator – by number of fee-earners**

Fee-earners in office	Person days: main office	Additional person days: branch offices
1–5	1	0.5
6–10	1.5	0.5
11–20	2	1
21–30	2.5	1
31–40	3	1.5
41–50	3.5	2
50+	4	3

**Table 2: Duration indicator – by number of support staff**

<b>Support staff in office</b>	<b>Person days: main office</b>	<b>Additional person days: branch offices</b>
1–30	0.5	0.5
31+	1	1

**Table 3: Interview sample size guidelines**

<b>Total number of fee-earners (inc. partners and principals) and support staff in the practice</b>	<b>Sample (%)</b>	
	<b>Fee earners</b>	<b>Support</b>
1–5	60	20
6–15	48	20
16–25	44	16
26–50	36	16
51–75	30	13
76–100	25	11
101–125	20	9
126–500	14	6
501–1000	14	6

To ascertain the interview sample size, place the total number of staff within a banding in column 1 of Table 3. Columns 2 and 3 then identify the percentage of the total staff to be interviewed, by fee earner and support staff.

For example:

Firm A: 4 partners, 16 fee earners and 17 support staff = 37 staff (therefore within the “26-50” bracket of column 1)

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Interview Sample Fee Earners:  $0.36$  (fee earner %) x  $37$  (total number of staff) = 13 fee earners

Interview Sample Support Staff:  $0.16$  (support %) x  $37$  (total number of staff) = 6 support staff

**Table 4: Case file sample table**

<b>Fee earners in sample</b>	<b>Case file sample range</b>
1	5 +
2-5	10-20
6-10	20-40
11-20	40-60
21-30	60-90
31-50	90-110
51-80	110-140
81-100	140-150