

# Suggested template for planning and recording CPD

## Worked example

Below is a worked example of how to complete the template form for planning and recording your CPD. It is an example only; the content of your CPD plan and record will reflect your own training and development needs. Please refer to the [guidance on CPD](#) for further details about CPD requirements.

Professional details			
<b>Name:</b>	Jane Smith	<b>Costs Lawyer number:</b>	CL 1234
<b>Covering the CPD period from:</b>	1 January 2024	<b>to:</b>	31 December 2024
<b>Type of practice</b> e.g. sole practitioner, costs law firm, solicitors firm, other in-house	Costs law firm		
<b>Current role and responsibilities</b>	Partner in the firm with my own case load. We are three partners and six employees, including two other Costs Lawyers. Responsible for aspects of practice management and client relationship development.	<b>Any likely changes to your role or responsibilities during the CPD period</b>	Due to another partner retiring, I will be taking over responsibility for management and supervision of staff from February.

## Planning your objectives

Skills category (and related Principles)	What CPD objectives have you identified in this area in light of your training needs?	What CPD activity will you undertake to meet these objectives and when?
<p>Legal and technical competence (Principles 2, 4)</p>	<p>As I have a heavy case load, it can be difficult to find the time that I would like to keep up-to-date with changes to costs law and procedure, and I often end up in a rush at the end of the year to fulfil my CPD points requirement.</p> <p>We are now being asked by clients for advice on non-party costs orders and there is an increasing demand for our costs budgeting services as further case law emerges.</p> <p>My objectives are therefore to:</p> <ul style="list-style-type: none"> <li>• Plan and maintain CPD on legal and technical competence throughout the year.</li> <li>• Improve my understanding of case law and practice relating to non-party costs orders.</li> <li>• Update my knowledge of case law and practice relating to costs budgeting.</li> </ul>	<p>Attend at least one external course or carry out online training on relevant costs law and practice every 6 months.</p> <p>Research or carry out training relating to non-party cost orders and costs budgeting.</p> <p>Set aside a fixed time in my diary every month to read ACL practice news and the other costs law updates that the firm subscribes to.</p>
<p>Professional ethics and behaviour (Principles 1, 2, 3, 5, 7)</p>	<p>See below – my development needs in this area are closely linked to client relationship management.</p>	

<p>Dealing appropriately with your client and third parties (Principles 1, 3, 4, 5, 6)</p>	<p>The practice deals with few lay clients but we had a complaint from one last year. Although the issue was ultimately resolved we felt that we could have handled the matter better and more swiftly.</p> <p>The objective is to be able to recognise a complaint earlier and ensure that proper processes are put in place and communicated appropriately to staff.</p>	<p>Attend a session/take online training in relation to complaints handling best practice by September 2021.</p>
<p>Practice management (Principles 1, 3, 6)</p>	<p>As I have limited experience of staff management or supervision, I have a development objective to better understand the requirements on me in this area and improve my skills.</p>	<p>Attend a session/take online training in relation to management and staff supervision by March 2021.</p>

### Recording your activity and outcomes

Description of CPD activity	Date	CPD provider	Learning objective(s) to which this activity relates	Was the learning objective met? (Y / N / Partially)	CPD points for this activity (one point per hour)
External training – costs law and procedure update	17 June	XYZ Costs Law Trainers	Plan and maintain CPD on legal and technical competence throughout the year	Y	3
Costs budgeting webinar	10 November	Newton Chambers	Update my knowledge of case law and practice relating to costs budgeting	Y	1

Full day attendance at ACL conference	22 June	Association of Costs Lawyers	Plan and maintain CPD on legal and technical competence throughout the year	Y	6
ACL membership (reading and considering practice updates)	Monthly	Association of Costs Lawyers	Plan and maintain CPD on legal and technical competence throughout the year	Y	2
Reading subscriptions on costs issues	Monthly	Smiths Solicitors LLP; Law Today Magazine	Plan and maintain CPD on legal and technical competence throughout the year	Y	4
Research	12 – 13 May	Online sources (Eastlaw; Law Texts Online)	Improve my understanding of case law and practice relating to non-party costs orders	Y	1
Reading LeO complaints guidance	5 – 6 February	Legal Ombudsman	Be able to recognise a complaint earlier and ensure that proper processes are in place	Y	1
Online training on managing staff in the legal environment	12 March	ABC People Trainers Ltd	Improve my staff management and supervision skills	In part	3

### Overall assessment of your CPD year

1. In relation to any learning objective that was not fully met, why was it not met or only partially met?

Although the course on managing staff in the legal sector improved my soft skills, I feel that I need further training on equality and other key HR obligations.

**2. How do you intend to achieve any learning objectives that are still outstanding or not fully met?**

I will arrange external training on legal obligations as an employer.

**3. Did you need to vary your learning objectives during the CPD period? If so, how?**

Given the very small number of complaints that we receive, I was unable to find external training on complaints that was time and cost effective. I therefore did my own research on the Legal Ombudsman's website and read their guidance.

I was also unable to find any bespoke training on non-party costs orders, so did my own research to deepen my knowledge and shared my learnings with colleagues internally through a lunch-and-learn session.

**4. If any of your CPD activities involved providing training to others, how did this contribute to meeting your own learning objectives for the year?**

Delivering a learning session to colleagues on non-party costs, as described above, helped me test my own understanding and gain different perspectives based on others' experience and the questions they asked. I also sought feedback from attendees on how useful they found the session, which will help me to better support my staff fulfil their own training needs as part of my new role.

**5. What are your overall thoughts on what worked well and what worked less well this year in relation to your professional development and training?**

Assessing my needs and planning my CPD throughout the year helped me get more value from CPD activities, as I no longer had to try and fit in activities in the final months of the year to make up the requisite points.

I found it difficult to source external training in certain niche areas. Next year I will establish a log of potential training providers and events, which everyone in the firm can contribute to and access.

**6. Have you identified any other training needs to help you comply with the Principles going forward?**

I intend to keep a focus on technical skills as well as improve my capacities as a manager.