# Suggested template for planning and recording CPD

Under the [Continuing Professional Development (CPD) Rules](https://clsb.info/for-costs-lawyers/costs-lawyer-handbook/), if you are a Costs Lawyers regulated by the CLSB then you are required to:

* Identify your training needs and set objectives for your CPD in light of your responsibilities and of the principles in the Code of Conduct.
* Evaluate the effectiveness of the CPD carried out against those objectives.
* Keep a written record of these matters for two years after the end of the CPD period.

This template is provided as a suggested model to assist you in meeting these obligations. **It is not compulsory and you are free to decide on the format that you use.** Please note that **there is no need to undertake CPD in a particular category if you consider that you do not have training or development needs in that category for the year in question.** For example, you may not be involved in practice management in your role, or you may have focused on a particular category and principles last year and met your objectives. Please refer to the [guidance on CPD](https://clsb.info/for-costs-lawyers/costs-lawyer-handbook/) for further details about CPD requirements.

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| **Professional details** | | | | | | | | | |
| Name: |  | | | | Costs Lawyer number: | |  | | |
| Covering the CPD period from: |  | | | | to: | |  | | |
| Type of practice  e.g. sole practitioner, costs law firm, solicitors firm, other in-house | | | | |  | | | | |
| Current role and responsibilities |  | | | | Any likely changes to your role or responsibilities during the CPD period | | |  | |
| **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? | | | | |
| Legal and technical competence  (Principles 2, 4) |  | | | |  | | | | |
| Professional ethics and behaviour  (Principles 1, 2, 3, 5, 7) |  | | | |  | | | | |
| Dealing appropriately with your client and third parties  (Principles 1, 3, 4, 5, 6) |  | | | |  | | | | |
| Practice management  (Principles 1, 3, 6) |  | | | |  | | | | |
| **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)** |
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| **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? | | | | | | | | | |
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| 2. How do you intend to achieve any learning objectives that are still outstanding or not fully met? | | | | | | | | | |
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| 3. Did you need to vary your learning objectives during the CPD period? If so, how? | | | | | | | | | |
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| 4. What are your overall thoughts on what worked well and what worked less well this year in relation to your professional development and training? | | | | | | | | | |
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| 5. Have you identified any other training needs to help you comply with the Principles going forward? | | | | | | | | | |
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