# 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[[1]](#footnote-1) | | |  | |
| **Planning your objectives** | | | | | | | | | |
| Skills category (and related Principles) | What CPD objectives have you identified in this area in light of your training needs?[[2]](#footnote-2) | | | | 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. If any of your CPD activities involved providing training to others, how did this contribute to meeting your own learning objectives for the year? | | | | | | | | | |
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| 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? | | | | | | | | | |
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| 6. Have you identified any other training needs to help you comply with the Principles going forward? | | | | | | | | | |
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You must retain this form, and evidence of the CPD activities listed on it, until at least two years after the end of the year to which it relates, even if you move organisation. If necessary, please download and retain any documentation that may be requested in the event of an audit before you lose access to it.

1. Unexpected changes to your role or responsibilities after your objectives have been set at the start of the year should be noted in the ‘Overall assessment of your CPD year’ section below. [↑](#footnote-ref-1)
2. Objectives should be specific, reflecting your own practice and skills. ‘Keeping up to date in costs law’ or similar is unlikely to be meaningful. [↑](#footnote-ref-2)