

CLSB mandatory 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			
Name	Jane Smith	Costs Lawyer number	CL 1234
Covering the CPD period from	1 January 2024	to	31 December 2024
Type of practice e.g. sole practitioner, costs law firm, solicitors firm, in-house	Costs law firm		
Current role and responsibilities	<ul style="list-style-type: none">• 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.	Any likely changes to your role or responsibilities during the CPD period	Due to another partner retiring, I will be taking over responsibility for management and supervision of staff from February.

<p>Are you (or are you seeking to become) any of the following?</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> an experienced practitioner <input checked="" type="checkbox"/> a people manager <input checked="" type="checkbox"/> a business manager <p>If so, you should consider the skills in the Ongoing Competency Framework when setting your CPD objectives.</p>	
<p>Planning your objectives</p>		
<p>Skills category (and related Principles)</p>	<p>List the CPD objectives that you have set in each skills category following your assessment of your training needs?</p> <p>You must set <i>specific and measurable</i> objectives reflecting your own practice and skills. “Keeping up to date in costs law” or similar is unlikely to be meaningful.</p> <p>You can use the CLSB’s annual Risk Outlook to help identify new skills you may need in future.</p> <p>Please delete any objective numbers not required.</p>	<p>How do you plan to achieve these objectives?</p>
<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>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>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> <ol style="list-style-type: none"> 1. Plan and maintain CPD on legal and technical competence throughout the year. 2. Improve my understanding of case law and practice relating to non-party costs orders. 3. Update my knowledge of case law and practice relating to costs budgeting. 	<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> <ol style="list-style-type: none"> 4. My 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>Attend a session/take online training in relation to complaints handling best practice by September 2024.</p>

Practice management (Principles 1, 3, 6)	5. 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.	Attend a session/take online training in relation to management and staff supervision by March 2024.

Recording your activity and outcomes

Description of CPD activity	Date	CPD provider	CPD objective(s) number 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	1	Y	3
Costs budgeting webinar	10 November	Newton Chambers	2	Y	1
Full day attendance at ACL conference	22 June	Association of Costs Lawyers	1	Y	6
ACL membership (reading and considering practice updates)	Monthly	Association of Costs Lawyers	1	Y	2
Reading subscriptions on costs issues	Monthly	Smiths Solicitors LLP; Law Today Magazine	1	Y	4
Research	12 – 13 May	Online sources (Eastlaw; Law Texts Online)	2	Y	1
Reading LeO complaints guidance	5 – 6 February	Legal Ombudsman	4	Y	0.8
Online training on managing staff in the legal environment	12 March	ABC People Trainers Ltd	5	In part	3

Overall assessment of your CPD year

1. In relation to any CPD 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 built some of the people management skills in the Ongoing Competency Framework – particularly around people engagement and culture, and conflict resolution – I feel that I need further training on equality and other key HR obligations as well as leadership development.

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

I will arrange external training on legal obligations as an employer for all partners and seek out more specific courses on leadership development and mentoring next year.

3. Did you need to vary your CPD 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 you are (or are seeking to become) an experienced practitioner, people manager or business manager, how did you consider the skills in the Ongoing Competency Framework when setting your CPD objectives and undertaking CPD?

I have focused on the skills in the Framework relating to people management this year to ensure I can fulfil my new responsibilities. I discovered supporting line reports through clear objectives and deadlines, as well as discussing their individual development needs enhanced my own skills and improved overall performance.

5. 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.

6. Is there anything else you considered in your overall assessment of the CPD period (for example, feedback from others)?

I used the results from a simple staff survey to assess the impact of my management skills, along with building in a question on my own performance as a manager in performance reviews.

I was also able to reflect on the feedback offered by clients about my technical and interpersonal skills, which offered positive reinforcement.

7. 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.

8. 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 capability as a people manager by continuing to build the skills in the Ongoing Competency Framework in that area next year.

The CLSB's Annual Risk Outlook has also helped me frame what other skills I should be developing in the coming year, in particular my understanding of how AI adoption could help reduce risk to my practice. There are also new areas of the legal market highlighted as worth exploring as part of the UK Government's growth agenda.