

# How to complete your own continuing professional development plan and record – your CPDPR

## Introduction

The following material was prepared by Emeritus Professor Neil Gold for the October 2013 NZLS workshop, “The NZLS CPD Rules – a practical guide.” Minor adaptations have been made in particular to the introductory sections. Work through it step by step to develop your own CPDPR and to understand the whole planning process and thinking behind it.

## What is a CPDPR?

The CPD Rules require all New Zealand lawyers to take personal responsibility for their on-going learning through a personalised tailored-to-need plan of activities supporting their own defined professional learning goals.

Each CPDPR is specific to each lawyer and documents:

- your learning needs and the types of activities you propose to take to fulfill them
- detail of the activities you undertake
- your reflections on these activities
- It will be accompanied by documentation verifying you completed your required CPD hours.

## What to do – plan, act, reflect

These worksheets will assist you through the three main stages central to developing and maintaining a CPDPR – planning, acting, and reflecting.

Templates to create your own CPDPR are available on the Law Society website at [www.lawsociety.org.nz/cpd](http://www.lawsociety.org.nz/cpd) in Microsoft Word and Excel format.

However, there is no prescribed format for the CPDPR, and you can use whatever system and format you feel most comfortable with.



EXAMPLE

**2. REFLECTION ON WHAT I DO WELL AND WHAT NEEDS IMPROVEMENT**

What I do well:

- 1. Knowledge of commercial law
- 2. Skills – drafting, negotiation, trial preparation
- 3. Professionalism/Ethics – NZLS rules
- 4. Practice management – time management

What needs improvement:

- 5. Knowledge – personal property security legislation
- 6. Skills – representing clients in the mediation of commercial disputes
- 7. Professionalism – mediation and ethics
- 8. Practice management – record keeping and billing

YOUR NOTES

**2. REFLECTION ON WHAT I DO WELL AND WHAT NEEDS IMPROVEMENT**

What I do well:

- 1. Knowledge of .....
- 2. Skills .....
- 3. Professionalism/Ethics .....
- 4. Practice management .....

What needs improvement:

- 5. Knowledge .....
- 6. Skills .....
- 7. Professionalism .....
- 8. Practice management .....



EXAMPLE

**4. PERSONAL LEVEL OF INTEREST IN IDENTIFIED PRACTICE NEEDS (CHECK AS APPROPRIATE)**

Practice area	Low	Medium	High
1. to learn about new personal property security legislation and related new cases personal property security legislation and related new cases		XXXXXXXXXX	
2. to acquire skills to represent clients in mediations and know more about special ethical provisions arising in this context			XXXXXXXXXX
3. to improve record-keeping and billing practices			XXXXXXXXXX
4. litigation and preparing for trial		XXXXXXXXXX	

YOUR NOTES

**4. PERSONAL LEVEL OF INTEREST IN IDENTIFIED PRACTICE NEEDS (CHECK AS APPROPRIATE)**

Practice area	Low	Medium	High
1. .... ..... .....			
2. .... ..... .....			
3. .... ..... .....			
4. .... ..... .....			













AN EXAMPLE CPDPR PLAN BASED ON THE PRECEDING WORKSHEET

Based on the example worksheet above, the example lawyer’s finished CPDPR would look like this:

Learning Needs, Outcomes and Reason for Them	Proposed Actions	Activities & Details	Date	CPD Hours	Reflections	
					Outcomes / Evaluation / What I Learned / Will Do differently	Further learning needs
<p>In order to help support my firm’s decision to expand our practice into new areas, including mediation, I need to acquire skills to represent clients in mediation.</p> <p>Learning Outcomes:</p> <ul style="list-style-type: none"> <li>To be able to engage in mediations on behalf of a client.</li> <li>To describe the role of the mediator and understand how that role influences the mediation process.</li> </ul>	Attend a 10-hour, skills-based workshop on mediation training that uses role-plays and simulations.	LawMed workshop: Mediating commercial disputes.	1 May 2014	10	<p>I will use “interest-based” negotiation when mediating commercial disputes.</p> <p>I will use active listening when interacting with the mediator and the parties to the mediation.</p> <p>I will use questions properly and strategically in the form suited to the outcomes sought at the time, as the circumstances require during mediations.</p>	I will pursue more advanced mediation training particularly training that deals with mediating complex commercial disputes and acting as a mediator.
<p>In order to meet my professional obligations, I need to know more about ethical issues that might arise in the course of mediation.</p> <p>Learning Outcome:</p> <ul style="list-style-type: none"> <li>To understand the ethical rules that apply to me as a client’s advocate in mediation.</li> </ul>	Form study group with lawyers in my firm to examine ethical issues in mediation.	Compile a reading list and schedule monthly meetings to discuss the reading material. Invite academic or speakers in the field to address the issue every other month.	Ongoing	5	I have a working knowledge of (1) conflict of interest requirements when deciding whether to act in a mediation; (2) confidentiality requirements for mediations.	I will continue to participate in monthly meetings with an expanded focus that includes ethical issues in commercial litigation and ethical issues facing mediators.
<p>In order to improve the management of my practice, I need to improve my record keeping and billing practices.</p> <p>Learning Outcome:</p> <ul style="list-style-type: none"> <li>To acquire a system and the habits that will improve my record keeping and billing practices to ensure that I account fairly and completely for the work that I do.</li> </ul>	Attend two webinars on practice management that concentrate on record keeping and billing.	<p>NZLS CPD sessions:</p> <p>Efficient Practice Management: Legislation Governing the Lawyer-Client Relationship – Rendering Accounts.</p> <p>Efficient Practice Management: Keeping Records and Rendering Accounts</p>	20 Oct 2014	6	I will be able to operate my practice more efficiently with my recently purchased practice management software to keep records and bill clients in a timely and informative manner.	I will monitor the success of the new software on my record-keeping and billing practices and make improvements where appropriate. I will continue to monitor developments in the practice management field to further improve my billing practices.
<b>CPD HOURS REQUIRED</b>				10		
<b>CPD HOURS COMPLETED</b>				21		
<b>CPD HOURS CARRIED FORWARD</b>				5		

## B. Act

Download a CPDPR template from the Law Society website at [www.lawsociety.org.nz/cpd](http://www.lawsociety.org.nz/cpd). Using your worksheet notes and the example CPDPR above, begin to fill in your own CPDPR. Start by noting your learning needs and proposed actions. As the CPD year progresses, record the details of the activities you undertake in your CPDPR. Use the CPDPR as a guide. Include:

- Name and date of the activity
- Details of organiser
- Learning outcomes
- Number of CPD hours. They must meet the requirements set out in Rule 3.1(b) of the CPD Rules i.e.:
  1. Are verifiable
  2. Provide for interaction/feedback
  3. Are planned and structured with identifiable aims and outcomes related to your CPDPR
  4. Are not part of your day to day work

## C. Reflect

Complete your reflections on your completed activities in the above template using the above completed CPDPR and the following material as a guide.

### IMPLEMENTING THE PLANNING AND REFLECTION CYCLE FOR LEARNING THROUGH CPD

Effective learning might be thought of as a process that incorporates reflection at various stages in the learning process.

Reflection begins when planning your annual CPD program of study as you think about your practice and identify areas that can be improved by engaging in a CPD learning activity.

When engaging in reflection *before* deciding on your course of CPD study consider these questions:

1. What are the skills and knowledge that I need to improve?
2. Have any ethical issues arisen I need to explore?
3. What educational opportunities are available to me that can address my learning needs?

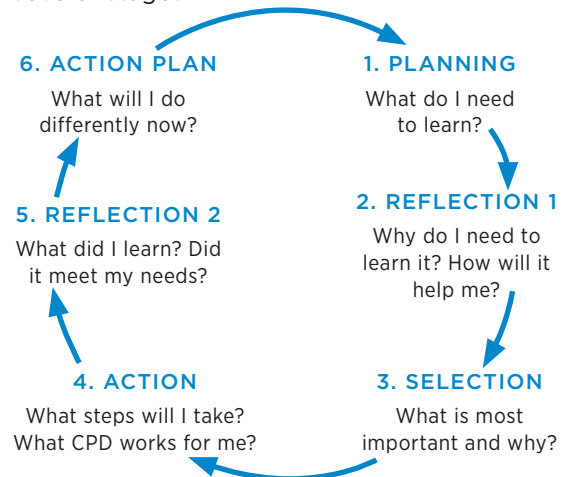
When engaging in reflection after

completing a CPD activity, consider these questions:

1. Did this program/course/study group, etc. help me develop the knowledge and/or the skills needed to improve the area of practice that I identified?
2. How can I implement what I learned in the CPD session to improve my practice?
3. Has this program helped me meet my learning outcomes? How?

### PLANNING AND LEARNING CYCLE

Effective learning incorporates reflection at several stages.



**ASSESSING THE CPD  
PROGRAM OF ACTIVITIES  
RETROSPECTIVELY**

Each year, upon completion of the CPD program of activities, consider the following questions:

1. Have all the learning outcomes identified in my CPD plan been achieved?
2. Are there still areas among those outcomes already identified for which further professional development is necessary?
3. Has my firm's business plan been altered so as to affect my practice needs?
4. Do I need to change the plan this year in light of 1-3, above?
5. Am I ready to identify different or expanded needs/outcomes for the following year?