

## **Assessing the impact of IPReg's CPD Reforms - a thematic review**

15 October 2024

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## **EXECUTIVE SUMMARY**

### **Background to the thematic review**

Historically IPReg's requirements were that attorneys undertook no less than 16 hours of CPD activity per practice year which was pro-rated if they were not in active practice during some part of the year.

On 1 July 2023 IPReg set out a new more reflective continuing competence approach which abolished the time requirement which attorneys should spend on maintaining their competence or developing their practice requiring them instead to:

- Reflect on their current practice
- Identify areas they could improve or develop (whether technical attorney competencies or more general skills such as around ethics, managing people, public speaking etc)
- Find activities they can do that would help them meet their aim (courses, seminars, mentoring, reading or authoring articles, webinars etc)
- After the event, reflect on how well the chosen activities met their aim – including whether more work was needed, whether their new knowledge could be shared more widely, what changes they may now make to their practice as a result etc.

### **Purpose and scope of the thematic review**

The purpose of this review is to assess, based on learning and development records provided by a sample of 128 attorneys spread across Patent and Trade Mark Attorneys, private practitioners and those working in-house, how the new system is bedding in.

IPReg asked me specifically to look at the following points:

- To identify examples of good practice to approaching reflection and learning such that the reader can see the outcomes of the exercise;

- To cite examples of where it is not clear that an attorney understands what is required of them or it is not clear what the value of the exercise has been to that attorney's individual practice;
- To identify any themes in terms of learning and development activities or areas chosen;
- To identify ways IPReg might improve its existing guidance on continuing competence.

### **Method Adopted**

I reviewed all submissions made to IPReg to note whether the subject had exercised reflection or not, get a feel for the range of training activities undertaken and the different approaches to documenting learning.

I then took a detailed sample of 50 records and analysed the data in more depth recording the following:

- Whether the subject worked as a Patent or Trade Mark Attorney;
- Whether the subject worked in private practice or in house;
- The extent of their submission;
- The types of learning recorded;
- Any points of good practice or points to feedback

I took this sample from subjects who submitted at different times within the submission window to factor out any bias by focusing on those who submitted towards the start of end of the window.

This analysis is attached as Appendix 1 to this Report.

## **Key findings**

### Types of learning and development activities undertaken

All subjects are undertaking relevant training and recording it.

The majority of subjects are undertaking both technical training and training in work based skills.

For technical training subjects varied but the most popular were linked to:

- The Unified Patents Court
- The European Patents Office
- AI
- Blockchain Technology
- Anti money laundering regulations
- Conflicts and ethics in IP

For work based skills there was an even greater variety but some more common topics were:

- Understanding and implementing the new IPReg Rules
- Leadership Skills
- Mentoring Skills
- Menopause awareness
- Neurodiversity awareness
- Empathy
- Diversity, Equality and inclusion

How learning and development takes place

This varies but most subjects reported a mixture of:

- Attending webinars
- Attending internal training sessions
- Reading journals
- Attending journal clubs
- Attending external events such as conferences and networking events

### Documenting of the learning and development activities undertaken

This was variable. The majority of subjects presented this in the form of one or more tables with in some but not all cases one or more columns to represent an evaluation of the training and additional actions required as a result.

However, a minority of subjects simply presented a list of what they had done with no reflection or evaluation of the learning.

The overwhelming majority were typed but 2 out of the 50 detailed sample produced handwritten records.

The extent of subjects' training record varied from 1-20 pages with the average length being 4 pages of A4.

### **Are subjects reflecting on their learning and development needs and learning and development undertaken?**

Reflection is key to outcomes based training and whether attorneys are selecting the appropriate training for them and that the training is genuinely adding value to their knowledge and skills. It is reassuring that the overwhelming majority of subjects (105/128) did demonstrate reflection, although this tended to focus more on evaluating the training than assessing their training needs.

### **Examples of Good Practice**

1. Subjects were clearly prepared for and invested in the change as a number of them recorded as part of their training reviewing material relating to the new IPREG core regulatory framework.
2. The overwhelming majority of subjects are undertaking learning and development appropriate to their practice and that this is not just restricted to technical areas but includes key softer skills areas such as professional ethics and the need for inclusive policies within the workplace.

Two particularly good examples of this were:

i An attorney initially reflecting, in response to a client query of the need to improve their knowledge of geographical indications and the hidden dangers surrounding them.

The attorney subsequently attending a CITMA webinar on 'the hidden pitfalls of geographical indications' and subsequently reflecting that it would be good practice, in addition to searching TM registers as part of clearance searches to search GI registers too.

ii Attorneys in management roles reflecting on their learning and development needs and recognising that they needed to undertake learning and development in areas such as mentoring, ED and I and neurodiversity in order to be able to manage in an inclusive way consistent with the values of the modern work place.

3. That learning and development is taking place throughout the calendar year rather than being concentrated in the period running up to the renewal of the practising certificate.
4. Subjects are, as anticipated by IPReg, customising the reporting template to their needs, including some firms producing their own precedents.
5. 82% of subjects have reflected on their learning and have come up with some smart ways of recording this such as asking the questions:

*'What did I learn and how can I apply it'*

*'Do I need to take further action?'*

*'And Now'*

6. A number of subjects included as part of their reflection training goals for the next 12 months.



7. One subject also used reflection to determine their training need and expressed it in the following way: *'having reflected on my practice and what I need to do to develop as a patent attorney, I identified three items'*

### **Examples of where there is scope to improve practice**

23 of 128 subjects from the sample did not undertake any significant reflection on or evaluation of their learning. Although this is the minority, at just under 20% it would still benefit from an action plan. I comment on this further in my conclusion below.

### **Examples of Challenges reported by subjects**

The key challenges that subjects reported were questioning the validity and rationale for the change of rules, that compliance would take a disproportionate amount of their time, and lack of clarity on what was required.

6 out of the 50 subject detailed sample reported that:

- 'the IPReg guidance does not focus on inhouse roles.'
- 'Why do I need to comment on everything I read or hear? I don't need to remind myself that something was boring, interesting or potentially beneficial. This last seems to be an exercise primarily for IPReg's benefit so it can assert it is "doing something".'
- 'It is unclear how information should be recorded in the new format'.
- 'It would not be proportionate if for every hour spent actually doing reflective CPD, and we do a lot in our firm, a further (even) 15 mins was required recording it. Time is a valuable commodity in our profession – that is a lot of attorney hours across the business'.
- 'My impression so far with the new approach is that it's hard to capture in detail the learning/value from ongoing and relatively small activities'.

- 'I've left my previous firm (which held my training records) in mid-November 2023 and set up my own fledgling IP firm thereafter. Is there any way of selecting someone else? The burden on my new firm of me having to compile this information from scratch (my old firm are not helpful) is significant.'

## **Conclusion**

It is clear to me that the majority of subjects have taken on board the change to outcomes-based training and are undertaking and reflecting on both technical and soft skills based learning and development activities.

There is no significant difference in the approach taken by Patent and Trade Mark attorneys and those who work in house compared to those who work in private practice.

There is some inconsistency in the way that subjects currently record their learning and development particularly the extent to which they reflect on it.

A minority of subjects question the value of reflection and the time it takes.

## **Recommendations**

1. IPReg commend their registrants for the work they have done to adjust to the new regime.
2. IPReg amend its template learning and development reports for planned and unplanned activities incorporating some of the examples of best practice above.
3. IPReg to consider whether it is necessary to have a separate template for unplanned activities or to combine the two.
4. IPReg provide registrants with a simple definition of how to implement reflection and its benefits to supplement the description of how reflection may occur currently on the website.
5. IPReg to consider whether it is worth prescribing a certain number of different outcomes annually as for example CILEx Regulation currently do.

## Introduction

Historically IPReg's requirements were that attorneys undertook no less than 16 hours of CPD activity per practice year which was pro-rated if they were not in active practice during some part of the year.

On 1 July 2023 IPReg set out a new more reflective continuing competence approach which abolished the time requirement which attorneys should spend on maintaining their competence or developing their practice requiring them instead to:

- Reflect on their current practice
- Identify areas they could improve or develop (whether technical attorney competencies or more general skills such as around ethics, managing people, public speaking etc)
- Find activities they can do that would help them meet their aim (courses, seminars, mentoring, reading or authoring articles, webinars etc)
- After the event, reflect on how well the chosen activities met their aim – including whether more work was needed, whether their new knowledge could be shared more widely, what changes they may now make to their practice as a result etc.

It should be noted that the above change is consistent with how other professions now manage CPD. The SRA, for example, reformed CPD for solicitors, moving from a system of 16 compulsory hours to a more outcomes based approach. This new approach requires solicitors to undertake regular learning and development to meet the standards of competence set out in the SRA's solicitors' competence statement.

These changes were approved by the Legal Services Board in February 2015 and took effect on 1 November 2016.

It should be noted that a major driver for the SRA was to move away from CPD as a tick box exercise with many solicitors concentrating their hours into the period shortly before the renewal of their practising certificate.

IPReg's approach has many similarities with that of the SRA as it makes clear in its Statement of Continuing Competence to be found on its website that it 'expects attorneys to evaluate the [continuing competence] activities undertaken, and properly consider whether those activities met the development needs the attorney identified.'

IPREG has issued extensive helpful guidance to attorneys on its website including an explanation of a rationale for the change, a simple description of how reflection can occur, a set of FAQs and some templates which can be used to record planned and unplanned learning activities including a section on evaluation.

### **Data I had access to**

I had access to the following:

The email sent by Fran Gillon explaining the rationale for this exercise

Training records covering the 2023/2024 period submitted by 128 attorneys

Email exchanges between IPReg and some attorneys requesting clarification of the submission

### **How I analysed the data**

I first reviewed all submissions made to IPReg to note whether subjects had reflected on their learning or not and to get a feel for the range of learning and development activities undertaken and the different approaches to documenting learning and development.

I then took a detailed sample of 50 records and analysed the data in more depth recording the following: Whether the subject worked as a Patent or Trade Mark Attorney;

- Whether the subject worked in private practice or inhouse;
- The extent of their submission;
- The types of learning recorded;
- Any points of good practice or points to feedback

The rationale for taking a sample in this way was to be able to analyse the data in more detail than would have been time or cost effective if it was necessary to look at all submissions in this way.

I took this sample from subjects who submitted at different times within the submission window to factor out any bias by focusing on those who submitted towards the start or end of the window.

Having read through all the submissions first I am satisfied that the sample analysed is representative of all key trends.

The sample breaks down as follows: 40 Patent Attorneys of which 9 work inhouse and 31 in private practice;

- 9 Trade Mark Attorneys of which 2 work inhouse and 7 in private practice;
- 1 dual qualified Patent and Trade Mark Attorney in private practice

This analysis of the sample data is attached as Appendix 1 to this Report.

### **Impact of the new approach**

All subjects are undertaking relevant learning and development and recording it.

The majority of subjects are undertaking both technical training and training in work based skills.

The majority of subjects (82%) are reflecting on their training, although in some cases they demonstrated this more strongly with regard to evaluating the learning and development rather than setting the initial training goals.

Although there are some common themes illustrated below it is clear that, as anticipated by IPReg attorneys are taking the opportunity to follow learning and development opportunities relevant to their practices.

These included themes as diverse as:

- The impact of Russian sanctions on patent applications
- The practices of the Chinese Patent Office
- USPTO practice

- Working with Power BI
- Geographical Indications
- Office 365 training
- Implementing Xero accounting software
- Writing Skills

For technical learning and development the most popular themes were linked to:

- The Unified Patents Court
- The European Patents Office
- AI
- Blockchain Technology
- Anti money laundering regulations
- Conflicts and ethics in IP

For work based skills there was an even greater variety but some more common topics were:

- Understanding and implementing the new IPReg Rules
- Leadership Skills
- Mentoring Skills
- Menopause awareness
- Neurodiversity awareness
- Empathy
- Diversity, Equality and inclusion

### How learning and development takes place

This varies but most subjects reported a mixture of:

- Attending webinars
- Attending internal training sessions
- Reading journals
- Attending journal clubs
- Attending external events such as conferences and networking events
- Completing formal training programmes such as the NLS IP Litigation Certificate

### Documenting of the learning and development

This was variable. The majority of subjects presented this in the form of one or more tables with in some but not all cases one or more columns to represent an evaluation of the training and additional actions required as a result.

In most cases the tables used were an evolution of the two suggested proformas on the IPReg website. Very few subjects made the distinction between planned and unplanned training.

However, a significant minority of subjects simply presented a list of what they had done with no reflection or evaluation of the learning.

One presented screenshots of the sign in pages for webinars booked.

The overwhelming majority were typed but 2 out of the 50 detailed sample produced handwritten records.

The extent of subjects' training record varied from 1-20 pages with the average length being 4 pages of A4,

## Examples of good practice

1. Subjects were clearly prepared for and invested in the change as a number of them recorded as part of their learning and development reviewing material relating to the new IPREG core regulatory framework.
2. The overwhelming majority of subjects are undertaking learning and development appropriate to their practice and that this is not just restricted to technical areas but includes key softer skills areas such as professional ethics and the need for inclusive policies within the workplace.

Two particularly good examples of this were:

i An attorney initially reflecting, in response to a client query of the need to improve their knowledge of geographical indications and the hidden dangers surrounding them.

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ii Attorneys in management roles reflecting on their training needs and recognising that they needed to undertake training in areas such as mentoring, ED and I and neurodiversity in order to be able to manage in an inclusive way consistent with the values of the modern work place.

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4. Subjects are, as anticipated by IPReg customising the reporting template to their needs, including some firms producing their own precedents.
5. 82% of subjects have reflected on their learning and have come up with some smart ways of recording this such as asking the questions:



*'What did I learn and how can I apply it'*

*'Do I need to take further action?'*

*'And Now'*

6. A small number of subjects included as part of their reflection learning and development goals for the next 12 months.
7. One subject also used reflection to determine their learning and development need and expressed it in the following way:  
*'having reflected on my practice and what I need to do to develop as a patent attorney, I identified three items'*

### **Examples of where there is scope to improve practice**

23 of 128 subjects from the sample did not undertake any significant reflection on or evaluation of their learning. Although this is the minority, at just under 20% it would still benefit from an action plan. I comment on this further in my conclusion below.

### **Comments by practitioners on the reforms**

Most practitioners were positive about the way that they and their firms had adopted the reforms. A small number, however, were unhappy.

The key challenges that these subjects reported were questioning the validity and rationale for the change of rules, that compliance would take a disproportionate amount of their time, and lack of clarity on what was required.

6 out of the 50 subject detailed sample reported that:

- 'the IPReg guidance does not focus on inhouse roles.'
- 'Why do I need to comment on everything I read or hear? I don't need to remind myself that something was boring, interesting or potentially beneficial. This last seems to be an exercise primarily for IPReg's benefit so it can assert it is "doing something".'
- 'It is unclear how information should be recorded in the new format'.

- 'It would not be proportionate if for every hour spent actually doing reflective CPD, and we do a lot in our firm, a further (even) 15 mins was required recording it. Time is a valuable commodity in our profession – that is a lot of attorney hours across the business'.
- 'My impression so far with the new approach is that it's hard to capture in detail the learning/value from ongoing and relatively small activities'.
- 'I've left my previous firm (which held my training records) in mid-November 2023 and set up my own fledgling IP firm thereafter. Is there any way of selecting someone else? The burden on my new firm of me having to compile this information from scratch (my old firm are not helpful) is significant.'

### **Divergence as between Patent and Trade Mark Attorneys**

TMAAs were marginally better at reflecting as only 2 out of 9 (22%) of the sample as distinct from 12 out of 50 (24%) of the PAs did not demonstrate any reflection. However, this is unlikely to be statistically significant.

### **Divergence as between In house practitioners and those in private practice**

In house practitioners within the detailed sample were better at reflecting than those in private practice as 100% of them reflected as against 70% of those in private practice.

It is not possible to say with certainty why this is but I suspect that the nature of their role as part of a business makes it second nature to reflect as part of their role in terms of how they can influence the business' objectives.

It may also be that with fewer colleagues to bounce ideas off they feel more dependent on reflecting on their training to ensure that they are up to date with the latest developments.

### **Conclusion**

It is clear to me that the majority of subjects have taken on board the change to outcomes-based training and are undertaking and reflecting on both technical and softer work based skills training.

There is no significant difference in the approach taken by Patent and Trademark attorneys and those who work in house compared to those who work in private practice.

There are some minor inconsistencies in the way that subjects currently record their training particularly the extent to which they reflect on it.

A minority of subjects question the value of reflection and the time it takes.

I suspect that these issues on reflection may arise from the fact that attorneys are overestimating what is required or struggling to see how the concept applies in the concept of their practice.

A small industry has grown up around the theme of reflective learning with numerous scholarly articles published.

There is however, a fairly simple and I think helpful definition to be found on the SRA website (<https://www.sra.org.uk/solicitors/resources/continuing-competence/reflect-identify/>) which IPReg could consider adapting:

*'Reflection involves thinking about your actions, identifying your strengths, and considering areas for improvement. You probably already reflect in your daily practice, whether you are aware of it or not.'*

*'Think about all the times you have considered how well a meeting with a client went or discussed an experience at work with a colleague. On the other hand, it could be a 'lightbulb moment' about how you might approach something differently next time. This is reflection and you should record these thoughts, for example, in a training record.'*

This could be translated into a series of questions such as:

*Which areas of my knowledge and skills do I need to enhance?;*

*What training did I undertake to do this?;*

*What would I do differently in my practice as I result of this training?;*

## **Recommendations**

1. IPReg commend their registrants for the work they have done to adjust to the new regime.
2. IPReg amend its template training reports for planned and unplanned learning and development activities incorporating some of the examples of best practice above.
3. IPReg to consider whether it is necessary to have a separate template for unplanned activities or to combine the two.
4. IPReg provide registrants with a simple definition of how to implement reflection and its benefits to supplement the description of how reflection may occur currently on the website.
5. IPReg to consider whether it is worth prescribing a certain number of different training outcomes annually as CILEx Regulation currently do.

**DAN HILL**

**APPENDIX 1**

**IPREG thematic review raw data analysis**

	<b>PA / TMA</b>	<b>Employed / In house</b>	<b>Length of submission</b>	<b>Areas of training</b>	<b>Reflection</b>	<b>Good Practice</b>	<b>Points to feedback</b>
1	PA	IH	2 pages	UPC Case law  EPO Guidelines  Leadership behaviours	Yes		
2	PA	IH	2.25 pages	UPC  Using Power BI  Risk management Leadership qualities	Yes		
3	PA	IH	5 pages	Generative AI  Open source approval process  Mergers and Acquisitions	Yes	Tabular format with different entry for each activity and separate column for reflection AND identified outstanding training needs by setting goals	
4	PA	IH	10 plus sides	Neuro diversity  SRA Accounts Rules	Yes		Complaint that IPREG guidance does not focus on IH roles

				Fintech UPC			
5	PA	IH	1 side	EPO case law update	Yes		
6	PA	PP	2 sides	EU court systems  SPC manufacturing waiver  Speaking at conferences  Effect of remote working on team	Yes		
7	PA	PP	3 sides	AI  Blockchains and crypto currency  USPTO practice  Implementing Xero accounting software	No		Narrative list no reflection
8	TMA	PP	8	AI  NLS IP litigation cert	Yes		

				EU case law update			
9	PA	PP	2.5	AI Delivery of content for CIPA computer technology committee	No		Narrative list no reflection
10	PA	PP	2	UPC cases Office 365 training Attending Pharma and Biotech conference	No		Narrative list no reflection
11	PA	PP	5	AI Money Laundering Regulations HR Regulations Menopause Neurodiversity	No		Narrative List no reflection 'Why do I need to comment on everything I read or hear? I don't need to remind myself that something was boring, interesting or potentially beneficial. This last seems to be an exercise primarily for IPReg's benefit so it can assert it is "doing something"
12	PA	PP	2	EPO UPC Conflicts	No	Range of legal topics and soft skills	

				Emotional Perception			
13	TMA	PP	3	DARTS IP Platform  Anti money-laundering Mentoring	Yes	Simple approach to reflection 'What did I learn and how can I apply it'	
14	TMA	PP	2	UKIPO hearings  AI  Transformation of International registrations	No		Narrative list no reflection
15	PA	PP	17	UPC  AML  EPO	Yes	Very good of template  Having reflected asked the question  'Do I need to take further action?'	
16	PA	PP	2.5	USPTO  UPC  Writing skills	Yes		Unclear how information should be recorded in the new format.
17	PA	PP	2	EPO  Transfer of priority rights  Conflicts and ethics	Yes		Concern about level of detail required 'It would not be proportionate if for every hour spent actually doing reflective CPD, and we do a lot in our firm, a further (even) 15 mins was required



							recording it. Time is a valuable commodity in our profession – that is a lot of attorney hours across the business’
18	PA	PP	3	CIPA journal review Neurodiversity	Yes		
19	PA	PP	4	EPO CIPA journal review Computer patents	No		List no reflection
20	PA	PP	2	Unitary patent register Boards of Appeal	No		Just screenshots of webinars attended
21	PA	PP		EPO CIPA journal review Reviewing noteworthy cases	No		List no reflection
22	TMA	PP	8	Cyber security Geographical indications Ambush marketing Canadian IP update	Yes	Use of additional question ‘And Now?’	

				EPO			
23	PA	PP	11	SEPs Patent Box Contributing to firm's sustainability innovation report DEI	Yes	Use of sub-heading 'evaluation of learning'	
24	PA	PP	5	New IPREg rules Supplementary Protection Certificates EPO Management skills GDPR	Yes	Good Tabular format	
25	PA	IH	4	UPC EPO Attended CIPA life sciences conference	Yes	Included plan for future 12 months	
26	TMA	PP	5	Breathing and mindfulness Ambush marketing	Yes		

				Trademark clutter Professional ethics			
27	PA/TMA	PP	6	AI Empathy Building relationships Listening skills Public speaking and advocacy	Yes		
28	PA	PP	9	New IPREG core regulatory framework EPO Billing practices Priority Claims LLP Values	Yes	Good tabular format	
29	PA and Head of Training	PP	5	SEPs FRAND AI Diversity	Yes		

30	TMA	PP	1	Domain blocking Geographical Indications IP and Insolvency	No		List no reflection
31	PA	PP	10	UPC EPO Mentoring	Yes		Handwritten
32	PA	PP	4	AI Design rights Journal club discussions	Yes		Narrative format including reflection
33	PA	PP	3	UPC AI Leading leaders Fovea	Yes		
34	PA	IH	2	Patent case law review Patents in the internet of things Presenting at external workshops	Yes		
35	PA	PP	13	EPO appeals	Yes		

				UPC IPREG client charging transparency			'My impression so far with the new approach is that its hard to capture in detail the learning/value from ongoing and relatively small activities'  He did however reflect at the end of the year.
36	PA	PP	1	SPC applications  Attended INTA annual meeting	No		List without reflection
37	PA	PP	1	EPO Guidelines  Review of CIPA journal	No		List no reflection
38	PA	IH	9	EPO  AI  Privacy and security training	Yes	Good concise entries for reflection	
39	PA	PP	2	Semi-conductor industry  Patent Box  SEPs	Yes	Reflection informing training need  'Having reflected on my practice and what I need to do to develop as a patent attorney, I identified three items:'	
40	PA	PP	4	EPO	No		List no reflection

				Practice management Windsor framework			
41	PA	PP	4	ChatGPT AI EPO evidence	Yes		
42	PA	PP sole practitioner	16	EPO Case reviews	No		Detailed list but no reflection
43	TMA	PP	8	UDRP complaints Case reviews Anti racism	Yes		
44	TMA	IH	10	IPReg's new approach to continuing competence NLS Trade Mark Practice Professional Certificate Hague system and international design registration	Yes	Use of 'Can I share this learning with others' question	
45	PA	IH	2	UPC EPO opposition	Yes	Good compact format particularly for reflection	

46	PA	PP	4	EPO appeals Reading CIPA journal Mentoring young attorneys UPC	Yes	Narrative format including reflection	
47	PA	PP Sole practitioner	6	Patent drafting Presentation excluded subject matter objections AI	Yes		
48	PA	PP	1.5	CIPA Journal The Green Industrial Revolution UPC	Yes	Good Compact reflection format	
49s	PA	PP	1	Russian Sanctions Recording CPD under new rules Validity of Madrid International Registrations in Africa	Yes		

50	TMA	IH	8	ADR Chinese Patent Office  Presenting to World Customs Organisation	Yes	Recorded learning outcome of the training in some detail rather than just completed	
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	Name [redacted for publication]	Reflection
51		Yes
52		Yes
53		Yes
54		Yes
55		Yes
56		Yes
57		Yes
58		Yes
59		Yes
60		Yes
61		Yes
62		Yes
63		Yes
64		Yes
65		Yes
66		Yes
67		No
68		Yes
69		Yes
70		Yes
71		Yes
72		Yes



73		Yes
74		No
75		No
76		Yes
77		Yes
78		Yes
79		Yes
80		Yes
81		Yes
82		Yes
83		Yes
84		Yes
85		Yes
86		Yes
87		Yes
88		Yes
89		Yes
90		Yes
91		Yes
92		Yes
93		Yes
94		Yes
95		Yes
96		Yes
97		Yes
98		Yes
99		No
100		Yes
101		Yes
102		Yes
103		Yes
104		Yes
105		Yes
106		Yes
107		Yes
108		Yes
109		Yes

110		Yes
111		Yes
112		Yes
113		No
114		No
115		Yes
116		Yes
117		No
118		Yes
119		Yes
120		Yes
121		Yes
122		No
123		Yes
124		Yes
125		Yes
126		Yes
127		No
128		Yes

## APPENDIX 2

### Curriculum Vitae

Name: Dan Hill

Address: 12 Wells Walk, Ilkley, West Yorkshire, LS29 9LH

#### Academic and professional qualifications

1991 First Class Honours degree in Social Anthropology, Cambridge University (Sidney Sussex College)

1992 Common Professional Examination first time pass

1993 Law Society Finals first time pass

#### Professional experience

March 2017-Present Self-employed Legal Education Consultant

June 2015 – Feb 2017 Director of Educational Development, the University of Law

July 2013-May 2015 Head of Learning and Development, The University of Law

2011-2013 Head of Undergraduate and Graduate Programmes, The University of Law

2007-2011 Head of Dispute Resolution, The College of Law

2004 Associate Professor, the College of Law

2001-2007 Senior Lecturer and course designer, The College of Law

2000-2001 Lecturer The College of Law

July 1997-Dec 2000 Assistant solicitor, professional negligence and commercial litigation department, Henmans, Oxford

March 1996-July 1997	Assistant solicitor commercial litigation department, Memery Crystal, London
March 1994-March 1996	Trainee solicitor, Slaughter and May, London and Brussels
Sept 1993-March 1994	Stagiare at The European Commission, Brussels

## SUMMARY OF DETAILED EDUCATIONAL AND TRAINING EXPERIENCE

### MY CURRENT PRACTICE

I work as a self-employed legal education consultant and have undertaken work for the clients listed below. The common theme within this work is that it focuses on the point of qualification of solicitors and the assessment of that standard.

1 The Solicitors Regulation Authority – I act as an Assessor of Equivalent Means applications for both the LPC and the Period of Recognised Training advising the SRA on whether applicants have met the relevant learning outcomes by Equivalent Means.

Historically I have also worked for the SRA as an LPC Chief External Assessor and member of the SQE advisory group chaired by Julie Brannan.

2 BARBRI. I mentor students undertaking BARBRI'S QLTS MCT preparatory course and tutor students on BARBRI's online SQE1 and SQE2 preparatory courses. This includes working as an assessor delivering mock MCT and OSCE assessments. I am consistently rated as 'excellent' by the students. I also work with students on a private basis.

3 Private tuition. I work with students both individually and on behalf of their employers to prepare them for the SQE1 and SQE2 assessments. I obtain exceptionally good results and feedback from both first attempt and resit students.

3 The Intellectual Property Regulator ('IPREG'). IPREG is the regulator for patent and trade mark attorneys. I advise them on setting appropriate standards for the profession's training requirements with an emphasis on litigation training. I devised outcomes for and assess institutional applications to deliver litigation training courses.

4 The Chancery Lane Institute of Professionals ('CLIP') Dubai. I advised the owners on all aspects educational and regulatory surrounding the establishment of CLIP, which is Dubai's first professional law school, and wrote and delivered a QLTS MCT Preparatory Course for them.

### WORK AT THE UNIVERSITY OF LAW

I worked for 17 years in professional legal education at the University of Law and acting as a consultant for PSRBS and gained a wealth of experience in the following areas:

- Teaching and assessing across undergraduate, post graduate and professional development training programmes with a focus on dispute resolution and advocacy
- Authoring and developing innovative learning materials for face to face and e-learning programmes
- Validation and critical review of the University's and other institutions' programmes
- External examining and consulting work focused on the development and regulation of professional legal education including acting as an SRA Chief External Assessor, advisor on the proposed SQE and assessor of applications to qualify as a solicitor by equivalent means
- Academic governance including acting as the Chair of the University's ethics committee and Head of Student Discipline

Teaching and assessing:

I have extensive teaching and assessing experience gained through delivering the University of Law's academic and vocational programmes as well as more specialist dispute resolution training programmes to solicitors, judges and policy makers in the UK and internationally.

The quality and innovation of my teaching has been regularly commended as excellent by students, colleagues, law firm clients, SRA monitors and the Chief Justice of Rwanda.

Key aspects of my experience include:

- Teaching and assessing on GDL, LPC and BPTC programmes
- Teaching and assessing on the pre qualification Trainee Litigation Programme
- Training on Linklaters' New Joiners Global Orientation Programme
- Training prosecutors and judges of the Supreme Court of Rwanda in the common law approach to advocacy and evidence

Authoring and developing programme materials:

This work involves developing programme specifications, authoring and reviewing materials and managing staff involved in authoring materials.

In this work I have gained particular experience working in partnership with the University of Law's external clients as well as dealing with internal stakeholders to ensure that the programme materials meet the customers' needs and are educationally optimised.

Key aspects of my experience include:

- Authoring bespoke LPC dispute resolution modules in partnership with Linklaters, Clifford Chance and Allen & Overy
- Authoring an LLM module in international arbitration practice in partnership with the IBA
- Authoring a range of e-learning materials for the University's online LLM and LPC programmes
- Authoring a legal masters research methods module
- Developing an in-house Academy for Irwin Mitchell
- Developing a new joiners global orientation programme in partnership with Linklaters
- Developing training materials to support vocational legal training at the Institute of Legal Practice and Development in Rwanda
- Supervising the design of the University's LL.B
- Authoring BARBRI's QLTS OSCE Guide and Civil Litigation workbook and materials
- Authoring BARBRI's SQE Civil Litigation materials
- Co-authorship of the leading textbook on mooting and advocacy skills for trainee lawyers

Development, validation and critical review of the University's and other institutions programmes

I have been responsible for developing and validating the majority of the University of Law's programmes. This typically involves design of a programme specification and teaching, learning and assessment methodology and presentation of that specification and methodology to a validation panel. I have also been retained by other institutions to validate their programmes as an external consultant. This has given me sector wide experience in appraising and evaluating the quality of legal training.

Key aspects of my experience are:

- Development and validation of the last three iterations of the University's LPC including the new reset LPC MSc and LPC LLM

- Development and validation of the College's 2 and 3 year practice focused LLBs
- Development and validation of a distance learning LLM in association with the International Bar Association
- Development and validation of a Spanish and UK joint qualifying law degree, run in partnership with IE Business School, Madrid
- Development and validation of a suite of innovative training programmes to form part of the Irwin Mitchell Academy
- External validation of the Association of Personal Injury Lawyers diploma
- External validation of an advocacy and litigation skills module for IPREG, the professional regulator for patent and trade mark attorneys
- External oversight as the Solicitors' Regulatory Authority Chief External Assessor of all 20 plus LPC providers' personal injury law modules

The evaluation, development and implementation of learning technologies

I was responsible at the University of Law for the development of appropriate learning technologies to broaden access and enhance the student experience consistent with the University's mission. Key aspects of my experience are:

- Development of of blended learning programmes by replacing the traditional lecture/advanced reading stage of students' learning with a digital webcast product.
- Development of an online LL.B and LPC
- Testing of learning analytics and digital assessment technology. These technologies have the potential to bolster student retention and progression by providing evidence based personal development plans and to enhance the use of formative assessment as a learning tool.
- Development of webinar software to deliver virtual classes
- Development and implementation of a model for portfolio based assessment on LL.M and LPC programmes

External examining and consulting work focused on the development and regulation of professional legal education

I have been retained since 2014 by the SRA as a consultant to advise them in the following areas:

- As Chief External Assessor for LPC personal injury electives I have quality assured and reported on standards across 20 different LPC advisors

- As a member of the SQE advisory panel I have advised on the development of the Solicitors Qualification Exam with a particular emphasis on the assessment of competency in civil and criminal litigation and skills
- As a member of the equivalent means panel I have assessed 20 plus cases of individuals who wish to qualify as a solicitor by equivalent means

I have been retained since 2013 by the Intellectual Property Regulator to advise on the development and accreditation of a litigation training course to confer rights of audience on trade mark and patent attorneys. In this capacity I have:

- Developed the accreditation criteria
- Reviewed applications for accreditation from 4 training providers and recommended accreditation to IPREG
- Acted as the external examiner for CPD training's basic litigation course

I am an advisor to the Chancery Lane Institute of Legal Practice, Dubai's only professional law school, on educational and regulatory matters

Academic governance:

I was the Chair of the University of Law's ethics committee and Head of Student Discipline. In this capacity I was responsible for:

Writing the ethics and student discipline policies

Reviewing applications for ethical clearance for staff and student research projects

Overseeing the student discipline policy including reviewing first instance and appellate decisions

Advising senior managers on student disciplinary matters

Referees

Steve Evans, Director of Validation the University of Law

Professor Peter Lyons, Principal CPD Training

Key Publications

Education resources

1. 'Legal Method manual' The College of Law 2003

2. 'Legal Method resource book' The College of Law 2003



3. 'International Arbitration Law' College of Law Publishing 2010

#### Public media

4. 'Moot pointers guaranteed to raise the bar' The Times 19/10/2004

5. 'What is mooting and why should you do it' Lawyer 2B Autumn 2005

6. 'The challenges of Legal Education In Rwanda' The Times 14/10/2010

7. 'Overcoming history – Rwanda's struggle to rebuild its legal system' Legal Week 16 March 2012

8. 'Charting the role of professional legal education in developing and strengthening the justice sector in post genocide Rwanda' The Law Teacher Volume 46, Issue 2 pp190-196, 2012

#### Conference papers

9. 'Practice makes perfect- use of practitioner led mooting to develop an enhanced student centred learning experience in undergraduate and GDL law courses' presented at the LILI (learning in law initiative) conference January 2005 and published on the LILI website

10. 'Mooting as the original form of experiential learning for lawyers' presented at the Higher Education Academy Conference in June 2005

11. The future's digital - a comparative study of digital assessment technologies' 2015 ALT conference paper

#### Text books

12. 'Mooting and Advocacy Skills' Thomson, Sweet and Maxwell (2007, 2010, 2015)