

## CPD and in-house meetings

### General

Sharing knowledge at suitable in-house educational meetings of CITMA Paralegals, either with or without Chartered Trade Mark Attorneys present, in private and industrial practice can also be an efficient and established way of meeting the CPD requirements. In this context, “in-house” also includes regular educational events involving small groups of CITMA Paralegals, along with Chartered Trade Mark Attorneys, not necessarily from the same firm meeting together.

Such in-house meetings should typically involve one or more of the following objectives and learning outcomes.

- Fostering awareness of recent case law in a relevant IP field (trade marks, designs or associated areas e.g. Copyrights, Patents, Passing off).
- Updating knowledge of practice changes and new procedures promulgated by the UK IPO, EPO, EUIPO, WIPO and foreign IP offices.
- Enabling participants to keep abreast of new legislation (primary and secondary) in the relevant IP field and contingent areas in the UK and other major jurisdictions.
- Sharing knowledge of best practice in day to day conduct/handling of individual IP cases, e.g. tips for overcoming official objections, opposition tactics, etc.

### Acceptability of in-house educational meetings for CPD purposes

In-house educational meetings which satisfy these criteria will automatically be considered as suitable for CPD purposes and in that respect be treated in the same way as CITMA CPD events and other related CPD events organised by other professional bodies. As a result such in-house educational meetings are not to be subject to any maximum cap.

A meeting may be partly educational and partly general, for example about workloads within the relevant group; in this case only part of the meeting will “count”. It will be for the person leading the meeting to determine the extent to which each meeting will count.

However, individuals and organisations must be prepared to substantiate the matters listed above e.g. attendance, content of meeting and relevant criteria, if required to do so by CITMA as part of its monitoring of CPD responses from individual CITMA Paralegals.

### Format, content and conduct of in-house educational meetings for CPD purposes

Inevitably “in-house” educational meetings will vary enormously across private and corporate practice and so a single model cannot satisfy every situation. However, it is recommended that the following aspects should normally be included.

#### **Formal structure**

Whenever possible a formal agenda or written summary of the topics to be covered should be issued in advance. This may usefully include more detailed listings of the case law/official materials/other sources which are to be reviewed.

**Preparation**

It is suggested that an individual is designated as the compiler for the materials to be discussed. They will have responsibility for reviewing relevant outside knowledge sources (IP websites, case law reports and alerts received from external advisers) and collating these materials following a defined structure, e.g. an indexed bundle.

**Frequency and duration**

While appreciating that such meetings have to fit around other work commitments, it is suggested that these should be held on a regular basis, for example quarterly and should last no more than 1-2 hours.

**Individual participation**

Individuals attending the meeting should be required to comment verbally on at least some of the materials e.g. provide a brief summary of a practice change and how it will affect future case handling.

**Record Keeping**

It is important that a designated individual should keep a record of the dates of meetings, participants and copies of the agendas/listings of topics discussed so that these can be produced if requested as part of the monitoring process of CPD compliance. Also, individual CITMA Paralegals can then refer to these records when maintaining their own personal CPD records.