

MEMORANDUM

TO: Fred Thrasher, NALP Deputy Director

FROM: Jean Durling, Fox Rothschild LLP
Ryan Galvin, Stradley Ronon Stevens & Young, LLP

DATE: October 16, 2025

RE: Board Report – Legal Employer Chief Officers Interest Group

Since our last report, we hosted monthly meetings in July, August, September, and October 2025.

July 16, 2025, Meeting Agenda:

- **NALP Foundation:** Skip Horne and Fiona Trevelyan presentation regarding new research study on performance evaluations.
- **GenAI training:** Who is responsible for AI training at the firms? Is it PD? Innovation? IT/IS? Is the responsibility split? And is there anything anyone is doing that has been particularly successful in this area?
- **1L recruiting:** What firms are doing (if anything) with the admitted/incoming 1L students (to get their name out/help out with student orientation, etc.) and when firms will start actively recruiting this 1L class for Summer 2026?
- **Summer recruiting update:** Have firms completed their hiring for next summer? What challenges have they experienced? Are they planning to shift strategies, timing, hiring approaches?
- **Attorney Exit interviews:** How do firms handle attorney exit interviews? Do they send them to anyone in the firm or keep them confidential?
- **2026 NALP Education Conference in Hollywood, FL:** Deadline for RFP's is fast approaching if anyone has ideas they would like to submit; also seeking volunteers for a prospective panel of former CTO's who made the jump to COO. If anyone knows someone in their network who made the jump and might be willing to join a panel.
- **Interoffice travel policy:** Do firms require employees to use their own credit cards for hotels, transportation, etc. and then be reimbursed? If so, how do you handle if they cannot afford to pay and be reimbursed? Company card or advance? Is the advance an automated process? Is the policy the same or different for attorneys and business professionals?
- **Partner "Success:"** Member firm currently has a year-long program in place to "train" newly promoted and new lateral partners about being a leader at our firm (e.g., business of law, conflicts, writing reviews, etc.). All classes are taught internally. For laterals, they have a very involved integration program, with meetings with the right practice groups, etc. for cross selling and monitoring to the benchmarks in their offer letters. What if anything do others offer newly promoted partners or laterals by way of training or setting them up for success? If classes or

training, are they taught internally or externally and by whom? Do you provide individual coaching? Who do you use and is that for all partners (or as needed)? What areas (leadership, BD, all?) Anything else provided?

August 20, 2025, Meeting Agenda:

Special Guests: Katherine Allen and Christina Wells, Flo

- Flo: Overview of Flo platform with focus on Flo Perform

Other Agenda Items (time permitting):

- What online onboarding resource systems for new team members are NALP Members using?
- How are benefit functions staffed? Structures? How many people and their roles?
- Remington vs. Towers for salary surveys (or both) and which do people find more valuable?
- Are firms requiring background checks for day workers through vendors (temps, catering, IT services) they contract with and more specifically, whether they delineate what is acceptable in terms of background check issues and what types of issues the workers can/cannot have to be sent as day laborers?
- Do firms allow AI Assistants to be used in firm meetings (via Teams, Webex, Zoom, etc.) and are there defined policies around use (client vs. internal use)?

September 17, 2025, Meeting Agenda

- **Social media checks** on candidates: recommendations on process and/or vendors.
- **Office seating** best practices: whether it is best to have attorneys sit next to each other by practice group in the office or whether it is best to mix up groups for integration purposes.
- Further **acceleration of summer associate recruiting** schedule.
- **Fall symposium** update.

October 15, 2025, Meeting Agenda

- **Time management** coaching/support resources for associates.
- **FSLA Classification** of coordinator or similar roles under managers.
- Discussion of **potential delay of Symposium** to early 2026 (current proposed date is 11/13 in Philadelphia).

We are currently focused on the planning of the group's annual Symposium. We have a tentative date of November 13 in Philadelphia. Our planning team is Tim Henderson, Lauren Brown, Shannon DeGennaro, Ryan Galvin, and Jean Durling. We only have sixteen (16) attendees committed so are exploring the possibility of moving to early January to see if we can get greater attendance. Our programming will center around the following topics as they were the most highly rated in our survey soliciting ideas for content; GenAI, recruiting challenges, and associate performance/development/retention.

We continue to discuss options/ideas for performance evaluations. The presentation by Flo at our August meeting was well received. Members continue to struggle with Aderant.

Another frequent topic is the challenge of the recruiting cycle and the impact of earlier interview dates on the process and students.

We continue to try to capture a slightly larger audience by posting information with other NALP Sections and groups, i.e., Experienced Professionals to make sure we are not missing members where this group could be a resource.

In closing, please let us know if the Board supports the proposed topics for our Symposium. Also, if the Board would like us to address any other specific areas or topics that could be helpful to the broader NALP membership during the Symposium or during our monthly meetings, we are happy to do so.

Thank you.

Jean and Ryan