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## MEMORANDUM

Date: October 26, 2020

To: Fred Thrasher, Deputy Director  
Kara Sutherland, Board Liaison

From: Carrie A. English, Section Chair

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Re: Lawyer PD Section Q2 Board Report

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The Lawyer Professional Development Committee has been very busy this quarter and we are pleased to provide you with our Second Quarter Board Report.

For easy reference, our work group sections and leaders are as follows:

*Education Work Group: Annual Education Conference/PDI/Bulletin Article Planning: Shannon Burke*  
*Lawyer/Law Student Professional Development Collaboration: Laura Bicks & Nicole Salama*  
*Best Practices in Lawyer PD/PD For the PD Professional: Sandy Minea*  
*Member Relations & Membership/Development: Andrea McIsaac*  
*Professional Identity Formation: Melissa Berry & Kendra Brodin*  
*Knowledge Management: Heather DiFranko*

### 1. Work Group Updates

#### **Education Work Group: Annual Education Conference/PDI/Bulletin Article Planning**

- The section submitted 22 proposals to be considered for NALP Bulletin publication. Of those, nine, or 41%, were accepted. We are very pleased with the number of submissions and the number that were accepted.
- The Work Group also had many proposals submitted for the NALP 2021 Annual Education Conference. To date, we are unsure of how many have been selected. With that in mind, we plan to encourage the panels not selected to present their publication idea as a webinar in early 2021.

## Best Practices in Lawyer PD/PD for the PD Professional

- **Caregiver Discussion:** The Professional Development Committee hosted a call on October 23<sup>rd</sup> to understand how legal employers are supporting their caregivers throughout the extended pandemic. Specific notes are captured below in the Environmental Scanning section of the report.
- **Webinars.** We have one webinar scheduled for January (exact date and time TBD) that we are jointly sponsoring with the newer professional's section. It will be an Experienced PD Professional Panel, discussing topics such as role, responsibilities, subject matter covered, etc. It will touch on "normal" and COVID issues. We are also looking for help in doing some other webinars on:

*Showing Your Value.* This program will touch on how to elevate your presence and show value in your role. It will discuss self-promotion, both of yourself and your group, within your firm as well as externally.

*Assessments.* This program will discuss who is using which assessments and whether they work. Participants will leave the session with an overview of a variety of assessments and a chart that compares/contrast assessment tools.

- **NALP Library.** We are also working to create a toolkit to be housed in the library, that will have links to articles, job descriptions, competencies, evaluation documents, and other resources. One volunteer is already working on a resource to kick this off and we will promote the idea on NALPconnect.
- **Creation of Articles Club.** We would post professional development articles to NALP connect and have space to discuss them there. We can also send around an article with each quarterly meeting agenda and have space on the agenda to discuss as well.

## Lawyer/Law Student Professional Development Collaboration

- A joint meeting of the Lawyer PD and Law Student PD sections took place on July 28, 2020. We agreed that it would be mutually beneficial for the sections to partner together for a webinar in early December, prior to the start of On-Campus Interviews, to provide law school career services professionals with tips and advice to pass along to students when interviewing remotely. This webinar will include law school and law firm professionals.
- **Webinar.** Carrie English hosted an Enhancing Your Virtual Presence for all NALP members of September 16<sup>th</sup>. The purpose of the webinar was to provide all NALP professionals tips and strategies for elevating their own on-line presence but to also provide talking points for those who assist with virtual on-boarding.

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- **Collaborative Discussion:** On July 30<sup>th</sup>, the Professional Development Committee and the Diversity, Equity & Inclusion Committee invited NALP members to join a collaborative discussion on Return to Work strategies and academic resources for employees with school aged children. Approximately 80 NALP members attended.

## **Member Relations & Membership Development**

- This work group is exploring ways to connect and reengage our broader NALP Law Firm professional development professions.
- The Professional Development Section will be hosting a ZOOM meeting during the annual Professional Development Institute Conference on December 3<sup>rd</sup> at 12:15 ET.

## **Professional Identity Formation**

- The Professional Identity Formation Work Group is excited to launch a law firm associate competency survey on November 2. The Work Group has been collaborating with the Holloran Center and Law School Professional Development Section's Professional Identity Formation Work Group. The survey will gauge what competencies and developmental expectations law firms have for their associates and how law firms use competencies and expectations in associate evaluation and development. The Work Group is grateful for the strong support of NALP leadership and staff on this survey effort. The survey questions are attached for the boards reference.

Here is the proposed timing for the survey:

- Monday, November 2: Launch Date
  - Thursday, November 5 and week of November 9: Inclusion in NALPNow!
  - Thursday, November 12 (tentative based on other NALP messaging): Survey Reminder Email Thursday, November 19: Possible additional inclusion in NALPNow!
  - Friday, November 20: Initial Close Date
  - Monday, November 23: Extension Email
  - Wednesday, December 2: Hard survey close date
- Members of the Professional Identify Formation group will analyze the data starting in January 2021, and the results will be presented in multiple formats starting in the spring, such as a webinar and Bulletin article.

## **Knowledge Management**

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- Sandra Minea and Heather DiFranco are serving as the liaisons for the Lawyer PD Section to the Knowledge Management team. In August, they received training from Lisa Quirk and Andy Hales on the overall goal and vision of the project and the specific process that will be used to review and tag the wealth of resources available through the NALP website. The tagging project itself began in September, with all liaisons being assigned a section or sections of the website to review and tag using a macro-enabled spreadsheet. So far, our team has tagged the “For Professional Development” section of the NALP website, several issues of the PD Quarterly, and Conference Handouts from the 2015 Annual Education Conference. The tagging will continue through Q2 and Q3.

## **Environmental Scanning:**

- On October 23<sup>rd</sup> the section hosted a meeting to provide an update on the work of the committee and to also gain a better understanding of how firms are supporting their caregivers during the pandemic. The following information was shared:
  - Caregiver Affinity Groups/Parental Resource Groups: These internal working groups are being widely offered and supported to provide parents and caregivers access to resources and best practices. In addition to provide regular opportunities to connect, these groups also provide resources for discussing challenge topics such as race and gender with children, doing crafts/activities, coffee hours to help with engagement. One firm shared that its affinity group hosted an infectious disease doctor who talked about what to consider when deciding to put kids back in school.
  - Third Party Vendors: Many firms are partnering with third party vendors to provide support to caregivers. Vendors discussed included Home Thrive, Bright Horizons, Varsity Tutors and Outschool.
  - Webinars/Training: Demonstrating commitment to ongoing professional development is important to firms and there has been an increased demand for training during COVID.
  - Wellness/WellBeing: Overall health and wellness continues to be a priority for many employers. Connecting people to resources remains critical. Firms discussed ABA Attorney wellness week, using Jon Krop for 20 minute meditation services and continued reminders of EAP resources.

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## **NALP 2020 Survey of Law Firm Competency Expectations for Associate Development**

This research project will explore competencies and developmental expectations for law firm associates and will identify commonalities and differences among the competencies emphasized by law firms. Additionally, this research will help law firms understand the varied ways in which competencies and developmental expectations are being used by law firms across the country as part of their associate development and evaluation processes. Finally, the research will benefit law schools by indicating the extent to which common competencies across law firms align with typical law school learning outcomes and by informing law school career and professional development offices about the extent to which these competencies are considered in the hiring process.

**The information you submit is completely confidential. No information that could be attributed to your organization will be published.**

**Please submit only one response per law firm.**

For purposes of this survey, “competencies” and “developmental expectations” mean those skills, abilities, and attributes that your firm has decided are desirable for your associates to possess and that your firm believes contribute to the successful performance of your associates.

1. Does your firm have competencies or developmental expectations for your associates?
  - a. Yes
  - b. No

IF YES to 1 ANSWER 2. IF NO to 1 SURVEY SKIP TO 13.

2. Are these competencies/developmental expectations formalized in writing?
  - a. Yes
  - b. No

IF YES to 2 – 3 and 4 NOT 5 and 6

3. How/when is the document describing the competencies/developmental expectations distributed to associates? **Select all that apply.**

The document describing the competencies/developmental expectations is:

- a. Not distributed to associates (do not select any other response options)
- b. Distributed to associates during onboarding
- c. Distributed to associates during the review process
- d. Available to associates on law firm intranet
- e. Other (please describe)

[OPEN TEXT BOX]

4. How/when is the document describing the competencies/developmental expectations shared with partners who are evaluating associates? **Select all that apply.**

The document describing the competencies/developmental expectations is:

- a. Not distributed to partners (do not select any other response options)

- b. Distributed to partners during the review process for associates
- c. Available to partners on law firm intranet
- d. Other (please describe)

[OPEN TEXT BOX]

IF NO to 2 – 5 and 6 NOT 3 and 4

5. Even though your competencies/developmental expectations are not memorialized in writing, how/when are these competencies/developmental expectations communicated to associates? **Select all that apply.**

The competencies/developmental expectations are:

- a. Not communicated to associates (do not select any other response options)
- b. Communicated to associates during onboarding
- c. Communicated to associates during the review process
- d. Other (please describe)

[OPEN TEXT BOX]

6. Even though your competencies/developmental expectations are not memorialized in writing, how/when are these competencies/developmental expectations shared with partners who are evaluating associates? **Select all that apply.**

The competencies/developmental expectations are:

- a. Not communicated to partners (do not select any other response options)
- b. Communicated to partners during the review process
- c. Other (please describe)

[OPEN TEXT BOX]

7. Which of the following sets of competencies/developmental expectations are included in your competency expectations? Please note that in completing your responses to this question, include only those things explicitly memorialized in the document describing your competencies/developmental expectations or explicitly articulated and communicated to associates as important competencies/development expectations.

**(REFORMAT AS TABLE WITH CHECKS)**

Category 1	Technical Legal Skills/Knowledge ( <i>Legal analysis, Legal knowledge/Expertise, Legal research, Problem-solving</i> )
Category 2	Relationship Skills ( <i>Cultural competence, Respect for others, Emotional intelligence/Empathy, Teamwork/Collaboration, Leadership</i> )
Category 3	Character Traits ( <i>Honesty, Integrity, Trustworthiness, Judgment/Common sense, Trustworthiness</i> )
Category 4	Self-Development Traits ( <i>Self-awareness, Self-discipline, Intellectual curiosity, Well-being, Self-direction</i> )
Category 5	Work Ethic Traits ( <i>Attention to detail, Initiative, Diligence, Perseverance, Responsibility/Reliability</i> )

Category 6	Communication Skills ( <i>Communicate clearly (sharing information), Listening (receiving information), Oral advocacy, Written advocacy</i> )
Category 7	Technological Skills ( <i>Analyze data, Social media expertise, Facility with various programs (Word, Excel, PowerPoint, etc.), Project management, Business/Financial knowledge</i> )
Category 8	Client Service Orientation ( <i>Responsiveness to client, Understand client business/circumstances, Respect client autonomy, Loyalty, Confidentiality</i> )
Other Category 9	Please list any other competencies/developmental expectations your firm has for its associates not listed above. [OPEN TEXT BOX]

8. Does your firm use the competencies/developmental expectations that you selected from the list above in performance evaluations of your associates?
  - a. Yes, we use all of the competencies/developmental expectations selected from the list above in performance evaluations.
  - b. Yes, we use some, but not all, of the competencies/developmental expectations selected from the list above in performance evaluations.
  - c. No
  
9. Does your firm have different competencies/developmental expectations for different experience levels of associates?
  - a. Yes (please explain)  
[OPEN TEXT BOX]
  - b. No
  
10. Please indicate whether your firm connects progress in competencies/developmental expectations to any of the following: (**Select all that apply.**)
  - a. Feedback on specific projects
  - b. Performance evaluations
  - c. Base salary
  - d. Bonus
  - e. Promotion to higher levels of associate
  - f. Promotion to partner
  - g. Training programs tied to competencies
  - h. Other (please describe)  
[OPEN TEXT BOX]
  
11. How often does your firm perform associate evaluations? Please select all that apply.
  - a. Once a year
  - b. Twice a year
  - c. Real-time, ongoing feedback
  - d. Other (please describe)  
[OPEN TEXT BOX]
  
12. Does your firm tie your competencies/developmental expectations to your hiring process and recruiting? **Select all that apply.**

- a. Yes – we use them for hiring summer associates or entry-level associates.
  - b. Yes – we use them for hiring lateral associates.
  - c. Yes – we use them for hiring lateral partners.
  - d. No – we do not use them in our hiring process and recruiting. (do not select any other response options)
  - e. I don't know. (do not select any other response options)
13. Please share the name of your firm in the box below so we can ensure that we only have one response per firm.  
[OPEN TEXT BOX - Required]
14. Please insert the name, title, and email address of the person completing the survey in case follow up is needed.  
[OPEN TEXT BOX][NAME Required]  
[OPEN TEXT BOX][TITLE Required]  
[OPEN TEXT BOX][EMAIL Optional]
15. How many lawyers are in your law firm (firm-wide)?
- a. 100 or fewer
  - b. 101-250
  - c. 251-500
  - d. 501-700
  - e. 701+