

MEMORANDUM

TO: Fred Thrasher, Deputy Director
Brad Sprayberry, Board Liaison

FROM: Jennifer Gallinson, Section Chair

DATE: October 13, 2016

RE: Lawyer PD Section Update

The Section is off to a good start so far. Overall the group is committed and responsive. We still struggle with membership and participation on calls. We have a few strategies to work on this but we welcome board input on this topic as well.

I. Work Group Reports

Education Work Group: Jeanne Picht

Jeanne reports the following accomplishments of this subsection. The group solicited several topics for inclusion in the NALP Bulletin. The articles selected for publication include:

1. *Training & PD for Summer Associates*, Jean Vrola, **November 2016**
2. *Presenting for the First Time*, Kristin Heryford, **December 2016**
3. *Mentoring*, Angelique Magliulo-Hager and Werten Bellamy **January 2017**
4. *Partner Competencies*, Angelique Magliulo-Hager and Sheryl Odentz, **March 2017**
5. *The Four C's of Collaboration*, Jeanne Picht, **April 2017**
6. Arin Reeves has been penciled in for a feature in the May 2017 issue

The PD section submitted 26 proposals for the 2017 Annual Education Conference in San Francisco. Of those 26, ten were selected. They are listed below. We received excellent support in terms of providing ideas and drafting proposals.

<p>Adapting Project Management Principles & Tech Tools to Talent Management</p>	<p>Over the last several years, many PD professionals have designed and developed project management training and tools for their firms and attorneys. How many of us, however, have taken the time to develop unique tools and systems supported by project management principles to help talent management individuals and teams manage their own workflow? This session will detail Fenwick’s recent journey to apply project management principles to its overall Professional Development & Recruiting workflow, to develop and use a specialized tool to support PD&R-specific project management, and effectively utilize OneNote to manage PD&R’s myriad historical and current information. The session will include a demo of the PD KanBan Board developed by Fenwick’s IT group, Fenwick Labs, as well as a demo of the PD OneNote information database developed by the PD&R team in collaboration with Fenwick’s Research & Intelligence group.</p>	<p>Jeanne Picht, Kristin Heryford</p>
<p>Everything Old Is New Again: Innovative Training Ideas</p>	<p>Ever notice the “new and innovative” training techniques harken back to something familiar? You’re not alone! Traditional educational models like apprenticeship, homework and onboarding are being reinvented and reintroduced in training and development initiatives, and not just in law firms. We’ll explore how technology and modern talent needs are being used to reignite these proven techniques, with a focus on what’s working, what isn’t, and where you should invest your limited time and budget dollars. Law firm PD, a legal industry consultant and progressive talent leaders in other industries will share their insights on the future of training and development.</p>	<p>Kristin Heryford, Paul Burton</p>
<p>Extreme Makeover: Evaluation Edition</p>	<p>I’m excited about my performance review! Said no one ever. While we can’t promise your lawyers will love their evaluations, we can help you improve and revitalize your evaluation process. Whether your evaluations need a bit of sprucing or an extreme makeover, this presentation will provide a fresh look, top to bottom of the mechanics of firm evaluation processes, including a discussion of project-based evaluations and the growing corporate trend to eliminate annual reviews altogether. We’ll deliver practical tips for increasing the overall effectiveness of the evaluations by planning the logistics of the process, determining timing and timelines, designing evaluation questions, selecting ratings scales, delivering the feedback through actual forms or feedback summaries and handling the follow-up and aftermath of the process.</p>	<p>Stacey Kielbasa, Jeanne Picht (Molly Peckman replacing Jeanne)</p>
<p>Feedback: Give as Good as you Get, and Get as Good as You Give</p>	<p>When a team member asks, “How am I doing?” what do you say? When you are looking for feedback, and you ask, “ How did I do,” what do you hear? The number one answer to both questions is most likely “Great,” and whether true or not, it is not helpful for either supervisors or team members. This program will provide simple yet effective ways to both give and receive feedback in order to encourage professional development and career growth. The program will also tackle some unique and difficult scenarios such as distance or remote feedback, providing feedback to high performers, and dealing with the ever popular “clueless” employee. Finally, the program will discuss feedback across differences and provide strategies to combat unconscious bias in the process. Using interactive exercises, participants will go from fearful to fabulous in giving and receiving feedback!</p>	<p>Jennifer Gallinson, Maria Minor, Jami de Lou,</p>
<p>Hacking the Wildebeest: Developing The Innovative Lawyer</p>	<p>As technology continues to upend the legal market, it is increasingly important for NALP professionals to innovate. In this program, we will discuss the use of data, scientific tools, and design thinking in PD, as well as how to identify and develop those lawyers with the aptitude to change the way we deliver legal services. We will discuss best practices utilized by Bryan Cave, consistently recognized as an innovation leader, and Diversity Lab, cultivating innovate ways to use data, science, and design thinking to boost diversity. To highlight the efficacy of such tools, we will facilitate the first-ever NALP hackathon.</p>	<p>Kelli Dunaway, Lisa Kirby, Kathryn DeBord</p>

<p>Orchestrate: Four Productivity Skills Every (Mid-Level) Manager Needs</p>	<p>This program focuses on the transition from individual contributor to manager. Managing cases, deals and other people are vital skills mid-level people must develop. Yet, there are scant legal-focused resources available to help them build that skill set. This program provides the tools to get your folks there. Productive managers focus the right people on the right efforts to deliver top-quality work to clients in a timely manner. Mid-level attorneys and managers can repeatedly achieve that result if a strong foundation is established first. Orchestrate provides immediately-actionable suggestions in these four managerial quadrants: • Consideration • Collaboration • Communication • Coordination This 75-minute program is built on: • Scientific Findings • Relevant Examples • Educational Exercises • Engaging Anecdotes • Pertinent Take-aways This program helps your productive doers mature into effective managers.</p>	<p>Paul Burton</p>
<p>Professional Development – Striking the Balance Between Handholding and Tough Love</p>	<p>Many law schools and law firms have mandatory or voluntary (but strongly encouraged) professional development classes or programs. Often, we find ourselves chasing participants down, holding their hands, giving concessions, or walking them to the finish line of professional development programs/requirements. How do we navigate the line between over involvement in the students'/summer associates'/ young associates' progress and fostering the creation of independent and responsible professionals? If we're over involved, they may not learn to take responsibility; but if we're not, they may not learn the critical skills they need to succeed. How do we strike the balance between handholding and tough love? How much support is the right amount so students/ summer associates/young associates succeed in the real world of deadlines, expectations, bosses, and consequences? What can law schools and law firms do to bridge this gap to create self-actuated young lawyers? What have law schools and law firms done that they have found to be effective?</p>	<p>Bonnie Tunick, Sandra Minea, Justine Maury, Meredith Schmitt</p>
<p>Situational Leadership - An Effective Tool for Leading & A Foundation for Mentoring</p>	<p>Current job demands require both talent professionals and lawyers to effectively manage a wide variety of personalities and skill levels, often without a grounding in leadership theory or training. This session is designed to provide an overview of current leadership theories with a more in-depth focus on the situational theory of leadership. Attendees will learn to apply the current Situational Leadership Model to the management and mentoring of talent teams and attorneys. In addition, this session will teach attendees to train others within their organizations to use situational leadership principles in managing others. Tips for using situational leadership as a foundation for mentoring also will be provided.</p>	<p>Jeanne Picht, Dana Gray, Ann Rainhart,</p>
<p>Springing into Action: Using Action Learning to Develop & Train Firm Leaders</p>	<p>In a continuously evolving legal environment, professional development programs must adapt and incorporate innovative instructional methods. This program will introduce one of these methods through a discussion of the basic tenets of action learning. What are the characteristics of a partner professional development initiative that adds value to each partners' development? Join us for an interactive session where you can move beyond your traditional initiatives as we explore - through case study - how the action learning method was utilized in two law firms to improve the efficacy of the training and development of law firm leaders.</p>	<p>Jessica Buchsbaum, Gillian Murray, Jennifer Gallinson,</p>
<p>Tales (not tails!) from Veteran Cat Herders (Succeeding as law firm administrators)</p>	<p>Sometimes what we do is as hard as herding cats. Yet a career in law firm administration can be incredible rewarding. This panel of veteran law firm administrators (one now a consultant) will share their practical tips on surviving and succeeding as law firm administrators including managing up (firm management), down (your team) and yourself (your career).</p>	<p>Molly Peckman, Michele Bendekovic, Chris Boyd,</p>

Law Firm/Law Student PD Collaboration: Angelique Magliulo-Hager

The Law Student PD section will send a list of questions CSOs would most like to ask firm employers. Once we receive them, we will work on getting them answers to those questions. Second, we are going to look at law school PD programs so that we can make recommendations on how best to bridge the gap. Our final goal is to discuss how best to help millennials leverage the unique strengths characteristic of those in their generation.

Secondment Work Groups: Kelli Dunaway

For the Secondments work group, the group had been asked to develop best practices. Kelli Dunaway was pleased to report that was accomplished in the article in June's NALP Bulletin. Kelly is looking for input from the board on next steps for her work group. Kelly will also work to publicize this article on NALP Connect for others to use as a resource.

Membership Work Group: Kristin Heryford

Kristin Heryford hopes to begin conducting new member interviews/surveys during the upcoming months and begin developing procedures/resources thereafter. Kristin's goals for the interviews are as follows: Understand the new member experience and how we can help; When should we reach out? What information/tools/resources should we provide? Kristin will continue to call on wisdom of longer standing members and investigate best ways to get involved. Kristin will work to improve new section member welcome procedures including initial welcome email and other resources.

Best Practices Work Group: Michele Bendekovic and Kay Nash

Michele and Kay are working on identifying appropriate "best practices" resources so that we can fully build out the Library/Resources page on NALP Connect. They have identified the following resources and asked members to provide additional resources for consideration: CLE program checklists, self-evaluation forms, lateral integration forms, individual BD plans, individual PD plans, training program checklists, sample orientations and sample evaluations. Kay will be loading them onto NALP Connect in the next few weeks.

Paul Burton has already agreed to do a program on Procrastination which we will make available to the section and beyond. We will work with Mary Beal and Paul to get that organized. Other topics include a possible writing webinar with Ross Guberman.

II. Other Section News

We had our Second Quarter call on September 29th. We had 12 callers, including 2 new members. The call was active and lasted approximately 30 minutes. The following topics were identified and discussed as timely in the world of PD. First, more PD Directors are being asked to design programming for directors & managers (non-attorneys). Topics include supervisory and management skills. Several firms are engaging outside consultants to provide mindfulness training and others are adding yoga to their course offerings. Security concerns are also important to law firms and firms are using inside resources (CIO) to provide

programming for attorneys. Firms have also created security test exercises that have been successful.

We are continuing to look at ways to promote our section and collaborate with law schools, experienced professionals, recruiting and diversity and, outside of NALP, the PDC. I welcome any feedback from the board on promoting this section more effectively. I look forward to working with the board in the upcoming months. Please let me know if there is anything the group can be doing to assist the board in any way.