

LAWYER PD SECTION

June 5, 2024 Quarterly Update to NALP Board

Co-Chair: Carole Deeter

Co-Chair: Kelly Ryan

To prepare for our first meeting as section co-chairs together, Kelly and Carole called a meeting with interested work group leaders (previous work group leaders and those who expressed interest in getting involved in the coming year). At that meeting, we identified new leadership for work groups, shifted some leadership roles around, and reinstated other leaders to continue their work.

There are a couple new initiatives in the section this year: Liaisons between the Lawyer PD and Law School PD sections, a Performance Review work group, and an AI in the Workplace work group.

- Lawyer/Law School Section Liaisons: in collaboration with Greg Miarecki and Tiffany Tucker of the Law School Section, we nominated liaisons from each group to the other. The objective is to foster collaboration between the sections and report back on efforts of each section. Susanne Aronowitz is the liaison from Lawyer PD to Law School PD, and Julie Dietrich is the liaison from the Law School PD section to Lawyer PD. We look forward to increased collaboration & communication between the sections!
- As part of the section's goals from last year, we asked to create a new work group this year to focus on performance reviews. Members of the section have been eager to learn about best practices, industry recommendations, and brainstorm on the topic.
- As directed by the board, we created a new work group for AI in the workplace. Rebecca Calman introduced us to Elise Tincher, who is well-versed in, excited about, and eager to learn more about the topic of AI. She is co-leading the work group, and we look forward to the group's first charge: compiling some best practices and helpful basic information for our members.

FULL SECTION MEETING

June 5, 2024 Full Section Meeting

Our June 5th section meeting had three agenda items: an overview of the NextGen Bar Exam, introduction of work group leads and call for volunteers, and open brainstorming for first year associate support ideas.

- Susan Landrum (Dean of Students at U of Illinois College of Law) gave an overview of the NextGen Bar Exam, which was identified at our Boston section meeting as a topic the membership was interested in learning more about. Most employer-side members of the section had not heard that there was a new iteration of the bar exam in the works, so the update was timely and appreciative. As implementation/adoption gets closer, it might be worth considering a NALP webinar on the topic to educate a wider audience. More information can be found at <https://nextgenbarexam.ncbex.org>. Susan also provided a copy of her materials which were uploaded to the section in NALP Connect.

- An update on work groups is below. The work groups' charges are new and/or still being settled, so we have minimal updates on progress and expect to be able to update more next quarter.
- During our open discussion time about first year associates, many good ideas were shared. Suggestions & ideas included:
 - A recommendation for working with an improv group (either one trained for corporate groups or a local one in your city) to help with communication skills.
 - A suggestion (from a law school member) to support first years in navigating difficult managers, particularly coaching on having conversations in a respectful way.
 - We polled the group on whether firms were bringing their first-year classes together for orientation in person, and most were. A consultant made some suggestions for neurodiversity inclusion at large orientations/summits, including plenty of breaks and a quiet space for decompressing.

WORK GROUPS

Education Work Group (Rochelle Weiner & Jessica Jacobs)

Rochelle shared a call for Bulletin articles, and there was a brief conversation about potential topics for section-sponsored webinars this year. Rochelle & Jessica will discuss with section members and consider topics that are not selected for PDI & AEC as well.

Rochelle also joined our section meeting in Boston, where some brainstorming around section priorities and conference proposals took place.

Lawyer/Law Student Professional Development Collaboration (Sarah Hadjimarkos and Susanne Aronowitz)

Susanne and Sarah are on board to continue speaking about and supporting the collaboration between law firm and law school PD. Heading into this NALP year, we've talked about the transition from law student to working professional, and required mindset shift, as a priority for this work group. We look forward to seeing what they come up with!

Best Practices in Lawyer PD/PD For the PD Professional (Angie Gumucio)

Angie is new to this work group and is eager to get started supporting the section. We solicited additional volunteers to work with her at the section meeting.

Member Relations & Membership Development (Tara Rhoades)

Tara is new to NALP and this work group and is eager to get started. She has shared some ideas about engaging with and welcoming new members, including directing them to available resources.

Lawyer Career Coaching/Advising (Thea Klinker and Nicole Llorenz)

Thea and Nicole planned a webinar for the section that took place on May 15th. The session was a roundtable discussion on "Integrating Coaching at Your Firm." Jennifer Gallinson and Jennifer Rakstad joined Nicole for the discussion, and the feedback has been very positive! We

will continue to explore whether we should invite Volta to share about their annual report on coaching at a section meeting later this year or if the webinar was sufficient.

Knowledge Management and Resource Implementation (Rob De Toni and Jennifer Lucas Ross)

Rob is new to NALP and the section, and Jennifer is new to this work group this year. We met with Rob to discuss priorities for the work group. At a minimum, the work group will continue with their goal of increased issue spotting and impromptu knowledge sharing over the next year, as well as possible one-off brainstorming calls on specific topics.

DEI Liaison (TBD)

We have not received the name of our DEI Liaison yet.

Well-Being Champion (Pascale Bishop)

No new updates from Well-Being this quarter.

Small & Mid-Size Firms (Jennifer Lucas Ross)

This work group is starting its second year. Jennifer keeps her own list of those interested in the topic, and they share resources with each other. Priorities for discussion topics and/or webinars this year include time management best practices for talent professionals in small & mid-size firms. Given the interest in this sub-section/work group, it might be worth NALP considering making it an official section in the future, particularly to allow leverage of NALP Connect.

AI in the Workplace (Elise Tincher & Hayley Accola)

This is a new work group, and Elise & Hayley are excited to get started. We've asked them to collect some best practices and basic knowledge resources to share with the section so that those who are intimidated by or skeptical of AI can start educating themselves. There is a good opportunity for this work group to collaborate with the education work group on a webinar this year as well.

Performance Reviews (Rob De Toni)

This is a new work group, organized to support the section as we all seek resources and best practices in evaluations at our firm. We are hoping the work group can gather recommendations, tool kits, templates, etc. to support our members as we work to support our firms in this area. This work group is also poised to make recommendations and guide the NALP Foundation in designing a survey should that be a topic of research this year.

LAWYER PD SECTION REQUEST OF NALP

1. Detailed NALP Study on Performance Evaluations

Chelsey Parrott-Sheffer and Carole posed this request to NALP last year, and Carole and Kelly would like to continue the push for support from NALP on this topic. We have left last year's

description below for reference, as it remains relevant. We are happy to brainstorm with the Foundation and/or the board at any time.

Our section continues to have discussions about evaluation best practices. As in many other areas of what we do, we hear from our partners/firms that “law firms are different” when we try to share suggestions or make changes based on the talent industry’s best practices for evaluations. Most of the articles on “best practices” or “trends” (quotes used intentionally) come from AmLaw or Law360, where reporters interview partners or managing partners, and not performance management experts.

It would be a fantastic value add to our members to have something from NALP or lawyer-specific to turn or point to when having these discussions. This reference would help us make the case with backed up data to our firms. The last official NALP study on law firm feedback practices is a 2006 guide titled *How Associate Evaluations Measure Up*. The report is clearly very dated, and it did not anticipate the incredibly important role Professional Development Teams and DEI Teams currently (and rightly) play in law firm performance review processes.

We would love for the board and/or the Foundation to consider an updated study/report on performance evaluation best practices. Some of our work group leads have very enthusiastically volunteered to assist with this project (as have we as Lawyer PD section co-chairs). We recommend that partnership with both a NALP trusted advisor and a non-legal performance management expert to collect and combine the data be considered as well. All of this would be with an eye toward making sure HR/talent management industry standards are being considered.

We know this is something that would take significant time to be considered before even being approved, but we agree that this would be an invaluable tool for our members.

2. Enhanced Resource Organization

Carole and Kelly frequently hear from section members that one of the most valuable parts of membership is the resource and knowledge sharing. NALP members are known to be generous with their experiences and materials. However, we also hear how hard it can be to locate resources in the current format, either by year in the conference planning handouts and/or within NALP Connect.

We would love for the Board to consider an internal re-design or investing in a Knowledge Management System where members could search through topics and subtopics to find what they need more quickly. NALP has a wealth of materials that are buried and therefore not making the impact that they otherwise could be. This issue is especially acute for our small/midsize firm group and members who are new to the profession, but I think everyone will benefit from a more navigable resource system.