

LAWYER PD SECTION

October 19, 2023 Quarterly Update to NALP Board

Co-Chair: Carole Deeter
Co-Chair: Chelsey Parrott-Sheffer

The Lawyer PD section has taken on many key initiatives this year with a strong focus on providing our members with tools they need to be successful within their respective organizations.

Below we detail two recent requests we have made of the NALP Board of Directors and include detailed notes from our work group meeting on October 4th and outline notes from the full section meeting we held on October 12th with special guest speakers.

LAWYER PD SECTION REQUESTS OF NALP

1. Detailed NALP Study on Performance Evaluations

Our section has had a lot of discussions, including in Vancouver, about the need for a study or guidance on 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. An Open Letter to Aderant re: Reported Issues with new viWave Platform

In August, members of the Professional Development Consortium held a Zoom call for members to discuss their experiences implementing viWave (formerly viClassic). About 30 law firm professional development and learning and development members joined to share widespread pain points with service levels they receive from Aderant, including with the newly implemented ticketing system; bugs and glitches in the software; and with generally finding the product to be inferior to what they were promised in the sales pitch. We learned that Aderant continues to approach firms to migrate from viClassic to the new platform despite the issues and service problems many of us are facing.

We question whether it would be both helpful and appropriate for our section to pen an open letter to Aderant noting these problems. We would not ask our members to sign their names or name their law firms' names. We would ask for stronger service levels and more honest communications with firms about the current product limitations.

FULL SECTION MEETING

October 12, 2023 Full Section Meeting

We used our full section meeting on October 12th to host a program we called FEEDBACK INNOVATIONS. We've been hearing from many of our members that feedback remains a hot topic in their organizations, especially in the hybrid workplace, and that they needed more advice on training partners on delivering feedback and on sharing best practices with lawyers who sometimes push back that their ideas won't work in legal.

Below is a brief recap of each of our speakers.

Attorney Feedback Systems

Erica Gholson, Director of Learning and Development at Quarles and Brady, told us about "The Loop," her firm's system for giving and receiving real-time feedback that was recently featured on the LegalSpeak podcast. Quarles worked with a vendor called IDEO to create the various tools that are part of The Loop.

Apps for Recognizing Strong Performers

Catie Karalis, National Senior Human Resources Operations Manager at Seyfarth Shaw, told us more about Go Seyfarther, the firm's new app and internal recognition program. They use the Reward Gateway software platform, which allows all employees to participate in peer-to-peer and manager-led rewards, recognitions, and acknowledgments and keeps Seyfarth employees connected across offices and teams.

Tips for Developing New Feedback and Evaluation Systems

We've heard from many PD professionals that it can be a struggle to get buy-in at a new firm when they pitch ideas for improving feedback and performance review structures. Jill Attkisson,

Chief Talent Officer of Thompson Hine, shared tips for building trust with firm leaders and convincingly using data and best practices to suggest change. Above all, she advised new PD professionals to “listen, listen, listen” when they first join a firm and recommended we learn more about change management. She recommended the book *Leading Change* by John Kotter for tools on change management principles.

REPORTS FROM OUR WORK GROUPS

October 4, 2023 Meeting of Work Group Leads

Education Work Group: Annual Education Conference / PDI / Bulletin+ Article Planning (led by Anna Hanzelka and Rochelle Weiner)

No new updates as they’ve filled the slate with Bulletin+ articles for this year and are in good shape on articles and webinar topics.

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

They are continuing to develop their curriculum on teaching the business of law with both law schools and law firms. They held a Zoom call in August with schools and firms that was attended by about 20 people. They’ve gotten good feedback on their content and have a number of people testing their content. They’ve had individual questions from firms. They’re going to present at PDI about this content and their experience with it. They want to see what other schools and firms have found about introducing the business of law to their firms. They want to have a toolkit that NALP can use for their constituents to teach this programming.

They have also planned to do two leadership development roundtables. The first is scheduled for October 25th. They’ll have a few people sharing examples of how they teach leadership development within their institution, either in a law firm or a law school. This will be 30 minutes and a quick lightning round way to share topics.

Best Practices in Lawyer PD/PD For the PD Professional (Jessica Jacobs)

As work group lead, Jessica Jacobs is still preparing a list of vendors and speakers on various topics and plans to collaborate with Shannon Burke on this. She would continue to appreciate having more volunteer support for her work group.

Additionally, she would like to see us offer more mentorship for NALP so that people who are newer to the profession can connect with more senior people. Rochelle Weiner offered to work with her on this. Both thought this could be a good collaboration with the Newer Professionals.

Member Relations & Membership Development (Heather DiFranco)

Heather welcomes new people when they join our section and educates them about ways to get involved and help the section. She is charged with thinking about how to encourage members of other sections to join us as well as having good relationships with PDC membership. She looks forward to sharing information on the work group with new members.

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

This work group is still brainstorming ways to collect information about the state of law firm coaching. Carole Deeter suggested they could utilize NALP Connect to collect information. They could also host a group Zoom to share feedback on how coaching is going in law firms. Carole thinks it would be helpful to survey people and re-share resources ahead of a meeting for people to talk about it.

Knowledge Management and Resource Implementation (Kelly Ryan and Shannon Burke)

Every month they're going to send out a request for resources on NALP Connect. Their first of such efforts was focused on collecting resources and best practices for First Year Orientation. They then scheduled a call for section members to discuss these resources as a group, and they plan to follow this model each month. As hosts, they will also share recommendations for speakers or resources they really like.

For next month, Shannon suggested they could source coaching questions or resources and hold a call about that at the end of the month. Thea was open to this idea and thought the two work groups could work together.

DEI Liaison (Doug Ebeling)

Doug is our section's liaison to NALP's Vice President of Diversity, Equity & Inclusion. He reported they are continuing to work on a new initiative to better prepare speakers for NALP AEC, PDI, etc. to make sure that people are open to all different kinds of cultures and more open to being a good presenter and using inclusive language. They'll also work with conference planning to make sure shepherds receive training if something happens during a program that is inappropriate or non-inclusive.

Some of our work group leads asked if there was any interest in doing a program on how the new *SFFA* decision impacts Professional Development. Our firm members have encountered some confusion about what is okay in the wake of that decision. One member mentioned they'd received requests for a women-only mentoring circle (excluding men) at their firm, and a partner told them it's no longer okay to do that because it excludes men. Similar questions have been

coming up regarding language in performance evaluations and other language used in the PD space. Doug said he would raise the idea of a training program on his next NALP DEI call.

Well-Being Champion (Pascale Bishop, Ice Miller, Chicago)

Pascale will work with the Well-Being Steering Committee and with the section. She would also like to help us include wellness in each of our section's quarterly meetings.

Communications, Social Media & Marketing (Hollis Alpert)

Unable to attend, so we await an update.