

MEMORANDUM

To: Jessica Sisco, Board Liaison

Cc: Fred Thrasher, Deputy Director
Claire Nash, Member Services Coordinator

From: Jennifer Gewertz and Adrienne (Jaroch) Kelly, Co-Chairs; Laura Higgins, Vice Chair Legal Employer Alumni Relations/Programs Section Leadership Team

Date: January 24, 2023

Re: Board Report, NALP Legal Employer Alumni Relations/Programs Section

During our Q3 Zoom call, the Legal Employer Alumni Relations/Programs Section heard from President-elect, Tony Waller, about his plans for the coming year and the need for volunteers, received updates on its charges from each of the Vice Chairs, and a featured guest speaker, Ida Abbott, discussing how law firms can improve the experience of retiring partners and find ways to keep retired partners engaged with the firm. This report provides an overview of the leadership team, summarizes the updates on the Section's charges, and the various topics that were discussed.

I. Leadership Team

Co-Chairs:

- Jennifer Gewertz, Arnold & Porter, jennifer.gewertz@arnoldporter.com
- Adrienne (Jaroch) Kelly, McDermott Will & Emery, akelly@mwe.com

Vice Chair:

- Laura Higgins, Haynes and Boone, laura.higgins@haynesboone.com

Annual Education Conference/*Bulletin+* Article and Webinar Planning Vice Chair:

- Haley Niven, BLG, hniven@blg.com

Knowledge Management and Resource Implementation Vice Chair:

- Danya Ray, Seyfarth Shaw, dray@seyfarth.com

Career Transitions Working Group Vice Chairs:

- Graziella Reis-Trani, Morgan Lewis, graziella.reis-trani@morganlewis.com
- Lora Whitticker, Sidley Austin, lwhitticker@sidley.com

Secondments Working Group Vice Chair:

- Adriana Marchetti, Fried Frank, adriana.marchetti@friedfrank.com

Member Relations Vice Chair:

- Paul Lazdowski, Proskauer Rose, plazdowski@proskauer.com

Wellness Champion Vice Chair:

- Erin Warner, Troutman Pepper, erin.warner@troutman.com

Communications, Social Media & Marketing Vice Chair:

- Eric Shea, Shearman & Sterling, eric.shea@shearman.com

II. Quarterly Section Call Overview

- On January 19, 2023, about 65 members of the Legal Employer Alumni Relations/Programs Section participated in the third quarterly call of the 2022-23 NALP calendar year.

A. Welcome

- The call commenced with a brief “welcome” from Section Co-Chairs, Jennifer Gewertz and Adrienne Kelly.

B. Update from President-Elect

- Tony Waller spoke to the members of the Section about the development of his strategic plan for the 2023-2024 NALP year and highlighted the need for volunteers. He also provided an overview of the last Board meeting.

C. Charges and Working Group Updates

- The Vice Chair(s) for each charge/work group provided an update.

C1. Member Relations

- The Vice Chair for this charge, Paul Lazdowski, is proactively reaching out to new members of the Section to welcome them. He is also reaching out to new law firm alumni relations professionals to make sure they know about NALP and the Section and encourage them to become a member. Section members who joined since our last quarterly meeting were announced and provided an opportunity to introduce themselves.
 - [Emma Case](#), Manager of Alumni Relations at Ropes & Gray
 - [Felicia Ho](#), Senior Manager of Attorney Development at Snell & Wilmer
 - [Pam Höh](#), Attorney Recruiting & Outreach Manager at Snell & Wilmer
 - [Benson Lee](#), Legal Recruiting and Talent Development Manager (West Coast) at Jenner & Block
 - [Eden Mandrell](#), Director of Partner Recruiting, Alumni Relations, and Career Strategy at Jenner & Block

C2. Annual Education Conference/*Bulletin* Article Planning

- Hayley Niven discussed the three panels the Section will have as part of the Annual Education Conference in Vancouver. She asked for volunteers who would be willing to attend a session and write an overview of it that could then potentially be used as the starting point for a *Bulletin+* article. Hayley urged Section members to reach out to her if they are interested in working on an article or have an idea for an article.
 - **2023 Annual Education Conference Approved RFPs**
 - Why Alumni Relations is Important to Career and Professional Development Programs: Paul Lazdowski, Jason Levin, Dana Morris, Christie Reynolds (Wednesday, April 26 from 1:30 pm - 2:30 pm)
 - The Data Behind Building a Strong Law Firm Alumni Program: Adrienne Kelly, Hayley Niven, Dr. Rebecca Paluch (Thursday, April 27 from 9:00 am - 10:00 am)
 - Managing Up: How to Routinely Present Alumni Program ROI to Firm Leaders: Danya Ray, Jenn Pedde (Thursday, April 27 from 1:30 pm - 2:30 pm)

- **Bulletin+ articles**
 - How Alumni Programs Can Work with Business Development Departments: by Hayley Niven (Published in November 2022)

C3. Knowledge Management and Resource Implementation

- The Vice Chair for this charge, Danya Ray, reminded everyone that we have wonderful resources available on the Section's NALPConnect page. She encouraged Section members to use the Discussion Board to ask questions regarding best practices on a variety of topics.

C4. Career Transitions Working Group

- Graziella Reis-Trani, one of the Vice Chairs for this Work Group, noted that the Working Group met a couple of weeks ago and discussed that the start of the year is often a busy time for career transitions so the group plans to meet more often in the first half of the year. The next meeting will be in early February.

C5. Secondments Working Group

- Adriana Marchetti, the Vice Chair for the Work Group, noted that the Working Group met back in November and the next meeting will be scheduled for mid-February.

C6. Communications, Social Media & Marketing

- Eric Shea, the Vice Chair for this charge, shared that the Section's first two posts (in September and November) were fairly successful. He hopes that the Section's third (and final post) of this NALP year, which is scheduled for March, will get even more likes/comments. Section members were encouraged to follow NALP on LinkedIn so they won't miss the Section's future posts and to contact Eric if they have an idea for the topic for the March post.

C7. Well-Being Champion

- Erin Warner, the Vice Chair for this charge, shared that the Well-Being Champions from each Section had their first meeting last quarter and the next meeting is January 27. She noted that there was a lot of overlap in the topics related to this issue that each Section was experiencing.

D. Ida Abbott - Retirement by Design

- Introduction by Jen Gewertz. Ida helps firm's review their retirement process and works directly with senior partners as they transition to retirement as well as currently retired partners.
- Ida is excited to know the Section exists. Several years ago, Ida wrote an article about retirement, and she found that almost everyone was focused on keeping in touch with current attorneys and no one was doing anything for retiring partners. It assumes once you retire, you're of no value anymore. Kari Thomas at Faegre hosts a retired partners lunch and gives them a room to meet as they would like to.
- Ida has been around NALP for a long time, but there are many new faces. She practiced law for 20 years at a big firm and then consulted in talent management and development for the next 25 years. Over the past few years, she noticed that a lot of her clients had become more senior leaders in the firm and started thinking about what happens next after they give up this significant role. She determined there was a need that others weren't addressing.
- We need more people to be paying attention to retiring attorneys. There's not a lot of attention to how this is happening. There can be disagreement and conflict over small things. People think they'll travel and have fun, but it can be a traumatic transition.

- There should be a knowledge transfer when lawyers retire, but lawyers tend to cling during this transition.
- This is something firm management should be addressing, but it can be difficult for them to do so.
 - 15% of people over 65 are still working
 - In 2022, 1/3 of lawyers over 62 had rethought their plans about retirement
 - Some as young as 50s are planning for retirement
- Not many firms have thought about this and we can be a leader by doing even something small
 - Judy Keys at Davis Wright Tremaine published an article called SAGE. An affinity group for lawyers with over 30 years of practice. It's a safe place for senior partners to talk about their plans and share information about planning for retirement. People feel honored when they're invited to join.
 - Some firms offer training to management on how to maximize retirement discussions and enable conversations to happen in a respectful and productive way
 - You can make use of retired partners in so many ways. Some don't want to be involved at all. Many others would want to be ambassadors.
 - Ida has a book that helps partners think about what's coming next rather than what they're giving up by leaving.
- Q&A
 - How early or before retirement is reasonable to start talking about this? How do you manage the timeline and their feelings around it? A: The longer it's discussed as an open issue the less shocked you are when someone talks to you about it. Most lawyers don't believe mandatory retirement will apply to them or they're not in control. Start the conversation when they become partners and keep it going throughout their tenure.
 - Tips for getting firm management buy-in to invest in the process for preparing people for retirement and staying connected to retirees; how can we say we're behind the curve or other ways to drive home that it's worth spending money on this. A: Hopefully within a year there will be a lot more to report on for what firms are doing around this. The Davis Wright example is great. All you need is an affinity group or a few lawyers to take the lead in starting the discussion. It can be as simple and cost-effective as making it a part of the conversation. Most firms invest in financial planning for new partners. There's no reason you can't ask those firms to include the need for financial planning for retirement as well. Having programs about what other retired partners have done with their newfound time will help partners adjust.
 - How does the affinity group work? A: They meet in various offices at some regularity. They can discuss confidential issues such as caregiving issues, family issues, financial issues. They conduct seminars around inter-generational work force and other diversity issues. Celebrate older partners. Take oral histories. The project is called wisdom of the sages. They get new energy because they have new members coming in all the time.
 - With mandatory retirement a lot of partners want to keep working, especially board positions. A: Things like that can't be started when you're retiring, they must be prepared for early on. Most programs are geared toward women, but most men retiring are still men.
 - What about the e-book and how would we advertise a program like that internally, because it allows people to think about retirement from the comfort of their own home. Can also be made available to senior staff. There are 8 modules. One of them is about succession planning and client transitions. The other 7 apply to anybody and include design thinking and motivation / encouragement. With everything things change, and this program helps you to respond to that change.
- Comments:
 - If anyone is interested in learning more about how Faegre Drinker engages with our retired partners | senior counsel | counsel as they transition from the firm and beyond, please send

Kari Thomas and Abby Raanan an email at alumni@faegredrinker.com. We would be happy to share what has worked well for us. Also, I can't speak highly enough about Ida. She is a NALP legend and so wonderful to work with too. 😊

- Article mentioned: <https://www.flipsnack.com/68FF6C5569B/wlj-vol-107-no-1-2.html?p=18>

E. 2023 NALP Annual Education Conference Update

- As a member of the AEC Planning Committee, Jennifer Gewertz provided an update on the conference. In addition to the three substantive programs being done by Section members and the Section meeting that will take place during the conference, the Section will host a small and information social gathering during the conference.

F. Next Quarterly Section Meeting

- Our next quarterly Section meeting is scheduled for Thursday, March 23 from 12:00 pm to 1:00 pm ET. We will also have an in-person Section meeting during the Annual Education Conference in Vancouver.