

Professional Development Department Staffing Models

The NALP Lawyer Professional Development Group created the PD Department Model Section to report best practices in organization and structures (without identifying firms) for staffing the PD functions at various sized firms — large, mid and small. The information shared in this report was gathered between October 2008 and January 2009. This report is not a survey, but a sampling gathered by the members in this workgroup who solicited information from various sized law firms on how they staff their professional development departments. Members of the workgroup are listed below.

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Professional Development Staffing Model: Small Firm (250 or Less attorneys)

- Data was collected between October 2008 - December 2008
- 10 firms surveyed
- Number of offices within each firm surveyed varied from 2 - 14
- The model does not represent the current PD staffing model at any of the firms surveyed in its entirety, but is based on ideas and practices in place at firms and is a compilation of best practices collected in a single model.
- The average number of FTE in each firm is 3.4
- Most firms surveyed have staff sharing responsibilities between PD and recruiting.
- In two cases, firms had brand new PD departments and were in the beginning stages of determining hiring needs.

PD Staff by FTE 1.9
 Recruiting Staff by FTE 1.5

<p><u>Chief PD Officer/Director - Firmwide</u> Strategic Planning, Development and Oversight of Firmwide Training, Professional Development Policies & Initiatives for Associates Hiring Member of the Associates Committee, Diversity Committee, Pro Bono Committee and Training Committee Budget Oversight/Reporting Development and Management of Substantive and Management Skills Training Curriculum New Attorney Orientation Programming Intranet/Extranet Development and Management Legal Personnel-related Policies and Procedures Oversee all areas of associate related matters - competencies, non-partner evaluations, mentoring, compensation Associate Terminations, Outplacement Decisions and Exit Meetings Performance Evaluations for income partners</p>	
<p><u>Professional Development Manager</u> Oversee all firmwide and office specific training programs Administer Orientation Programming Maintain and update Competencies/Skills Tracking Budget Management Outside Training Opportunities Legal Personnel issues - New Attorney Arrival Processing, Data Management, Associate Liaison Mentor Program Attorney Retreats</p>	
<p><u>PD Coordinator</u> Attorney Training Coordination File Maintenance Firmwide and Office Specific Training and CLE Administration and Coordination MCLE Compliance Management</p>	<p><u>PD Coordinator</u> Special Events Support (firm charity and other events) Women's Initiative Support Legal Personnel Support General PD Support</p>
<p><u>PD Assistant</u> PD Program Assistance MCLE Database Administration Accounting/Expenses and Check Requests Calendar Coordination File Management/Completion Misc Projects</p>	

Professional Development Staffing Models: Mid-Size Firm (251 - 500 attorneys)

Information on the attached models were collected during interviews with Professional Development staff at 3 different multi-office law firms ranging in size from 275 – 400 attorneys. Firms interviewed had anywhere from 2 to 9 offices with the biggest firm also having international offices.

- This model assumes that the Director-level position has significant professional development responsibility but may also have responsibility in attorney recruitment therefore the FTE has been reduced to show the split between attorney recruitment and professional development.
- For a coordinated firmwide approach to professional development, positions in the attached model may or may not be located within the same office. Two firms interviewed have staff in multiple offices who handle different facets of the professional development department activities.
- This model assumes that the assistant-level position may have responsibilities outside of professional development (firms interviewed shared assistant support with recruiting or marketing). In a mid-size firm, this assistant role may also be a legal secretary with other responsibilities. Use of staff who also support client billable activities was not the preferred method of staffing among those interviewed, based on conflicts that arise between the completion of billable vs. non-billable projects.

<p><u>Director of Professional Development (.75 FTE PD)</u> Attorney Professional Development Training Curriculum Development Associate Evaluations Associate Compensation Associate Integration Legal Personnel Issues Orientation/Exit Meetings Mentoring Programs Of Counsel or Partner Evaluations Career Development Plan Oversight Attorney Retreats Project Staffing/Associate Productivity Monitoring Lateral Recruitment Oversight Recruiting Process Oversight</p>	
<p><u>Prof. Dev. Manager (1.0 FTE)</u> Associate Evaluation Process Attorney Training Delivery & CLE Management Upstream Reviews Manages Career Development Plan Process Orientation/Integration Arrival/Exit Processing Attorney Information Data Management Mentoring Program Support Associates Committee Support Outside Seminar Coordination Bar Membership Management/Expenses Associate Retreat</p>	
<p><u>Professional Development Coordinator (1.0 FTE)</u> CLE Coordination & Compliance Attorney Training Support Attorney Training File Maintenance Bar Application Paperwork Processing Bar Dues and Prof Org Check Requests Coordinates CLE provider memberships and webcasts Outside Seminar Coordination Intranet Development or Maintenance Associate Evaluation Support Mentor Program Reminders and Events PD expenses, payroll, moving, stipends, bonuses</p>	
<p><u>Professional Development/Recruitment Assistant (.25 FTE)</u> New Attorney Logistics and Orientation Assistance Attorney Personnel Paperwork Processing Phone Coverage Calendar Coordination Website Updates/Revisions Special Projects Attorney Recruiting Support Also provides administrative support to Director</p>	
<p>OTHER PD-RELATED AREAS:</p>	<p>Diversity Initiatives/Women's Initiatives Career Development/Counseling Contract Attorney Hiring</p>

Professional Development Staffing Model: Large Firm (500+ attorneys)

- Information was gathered between December 2008 and early January 2009.
- Staffing model presented is based on information gathered through
 - a. Direct contact with 6 international law firms with multiple offices in the US and overseas and more than 1000 attorneys worldwide; and
 - b. PD Team informational chart posted on PDC ListServe, which includes information on 16 law firms with more than 1000 attorneys.
- The model does not represent the current PD staffing model at any of the firms surveyed in its entirety, but is based on ideas and practices in place at firms and is a compilation of best practices collected in a single model.
- 21 out of 22 firms task their PD departments with CLE and general training responsibilities and “New Attorney Programs/Orientation.” Beyond that, there is a great deal of inconsistency in terms of PD department responsibilities.
- One firm (currently) has a “Professional Development” department whose *sole* function is attorney training; ‘career management’ functions, including mentoring, evaluations/feedback and career development, are housed in a separate department within the firm. However, this firm has a “Firmwide Chief of Legal Personnel” who oversees both departments.
- Staffing models (and numbers) varied greatly from a low of 3 to a high of 17. None of those with whom I spoke believe that their PD staffing model is ideal and all believe their staffing resources are inadequate.
- Two of the firms polled indicated they plan to revamp their PD staffing model in 2009. Other firms expect changes in their staffing models in 2009 due to the fact that their firms have instituted a hiring freeze and are not allowing replacements to be hired when individuals leave their jobs.

<p><u>Chief (Firm-wide) Professional Development Officer (1 FTE)</u> Strategic Planning, Development and Oversight of Firm-wide Training, Professional Development (and Legal Personnel) Policies & Initiatives for firm attorneys Department Budget Member, Executive Committee Firm Survey Review and Approval</p>	
<p><u>Attorney Training Director – Firm-wide (1 FTE)</u> Develop and Manage Training Curriculum for Firm and Office Specific Programs – Substantive & Skills Develop and Manage New Attorney (non-partner & partner) Orientation Programs Budget Oversight/Reporting Intranet/Extranet Development and Management</p>	<p><u>Professional Dev . Director – Firm-wide (1 FTE)</u> (Design/Develop/Oversee) Associate Professional Development Programs and Policies: competencies, non-partner evaluations, mentoring (Design/Develop/Oversee) Legal Personnel Policies, Programs and Procedures: New Attorney Agreements, Processing and Orientation & Integration, New Partner Orientation, Compensation (Benefits), Bar and Professional Memberships, Work visa and Expatriate issues, Associate Terminations, Outplacement Decisions and Exit Meetings Budget Oversight/Reporting Intranet/Extranet Development and Management Firm-wide Retreats Internal Surveys Coordination</p>
<p><u>Regional or Office Specific Training Manager (1 FTE)</u> Training: Oversee and implement firm-wide programs, develop and implement office-specific CLE programs Administer/Oversee New Attorney Orientation Programs Competencies/Skills Tracking Budget Management Bar Membership Management/Expenses Identify Outside Training Opportunities Committee Member/Support - PD</p>	<p><u>Regional or Office Specific PD Manager (1 FTE)</u> (Administer/Oversee): Legal Personnel-related Policies, Programs and Procedures: New Attorney Arrival Agreements, Processing, New and lateral attorney and new partner orientation coordination, Attorney Integration, Attorney Information Data Management, Compensation (Benefits), Bar and Professional Memberships, Work visa and Expatriate issues, Departure Processing (Administer/ Oversee) Associate Professional Development Programs and Policies: competencies, non-partner evaluations, mentoring Ombudsman/ Associate Relations Liaison Committee Member/Support – PD, Evaluation, Associate, etc. Event-related activities including Firm-wide/Regional/Office Retreats, morale Budget Management</p>
<p><u>Training Specialist or Coordinator (Per Office) (FTE can vary depending on office size – from 1 to .25)</u> Attorney Training Coordination (for in-house firm-wide and office specific programs - live, webcasts, recorded, etc.) Outside Seminar Coordination Training Calendar & Library Maintenance CLE Administration and Coordination MCLE Compliance (Database) Management Coordinate New Attorney Orientation Intranet/Extranet Revisions Training-related Reimbursement Requests Administrative Support to Training Manager Special Projects</p>	<p><u>PD Specialist or Coordinator (Per Office) (FTE can vary depending on office size – from 1 to .25)</u> PD Program Administration and Support Legal Personnel Support Reimbursement Requests Event Planning/Coordination Intranet/Extranet Revisions Administrative Support to PD Manager Special Projects</p>
<p><u>PD/Training Assistant (Per Office) (FTE can vary depending on office size – from 1 to 0)</u> Administrative Support to Training and PD Programs PD Program (Logistical) Assistance Training Program (Logistical) Assistance MCLE Database Assistance Training File Maintenance Accounting/Expenses and Check Requests Training and PD Program Calendar Coordination File Management/Completion Special Projects</p>	
<p>OTHER PD-RELATED AREAS:</p>	<p>Diversity Program/Initiatives Partner Training 360 (Supervisor/Partner) Reviews Project Staffing / Associate Utilization / Hours Career Development/Counseling Contract Attorney Hiring</p>