Winter 2007 Survey Update on PD Spending and Staffing
Part 2: PD Staffing, Resources, and Results
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The first part of this report, on PD budgets and purchasing, appeared in the February issue. It showed that law firms' direct dollar spending for their PD programs has markedly increased across the board since our last survey in 2002. PD financial control and reporting processes, however, continue to be somewhat decentralized and problematic.

Because direct dollar spending is only part of the picture, our survey also asked about indirect investments in professional development staffing and other internal resources, including the number, compensation, and qualifications of PD staff; what other internal resources are available to PD; and the adequacy of both kinds of resources overall. We also asked what feedback is being collected on the value and impact of the program, and what that feedback shows about its impact and contributions. The respondents' answers to those questions are analyzed here in Part 2 of the survey report.

In theory, there should be some tradeoffs among external spending, internal resources, and program results; and we were interested in seeing how those tradeoffs might play out. For example, all other things being equal, investing in a larger and more competent PD staff should reduce direct expenditures to purchase outside products and services; it should also improve program results.

As Part 2 will show, firms have significantly increased their investments in staffing and other supporting resources for PD. Evidence of the return on those investments, however, remains elusive and largely anecdotal.

I. Respondent Profile for Part 2

In this continuation of the survey report, we have included responses from two additional firms that were unable to participate in Part 1. This raises the number of firms responding to Part 2 of the survey to 17 (from 15 in Part 1), the average firm size to 569 (from 559), and the total number of lawyers in the respondents' PD programs to 9,680 (from 8,380). It also raises by one the number of firms in each of our subcategories by size; we now have data from 8 firms of 500 or more lawyers (average size 928 lawyers), and 9 firms of under 500 lawyers (average size 251).

As in Part 1, we report the survey data from three perspectives:

1. For all 17 responding law firms as a group,
2. Separately for the two subgroups of larger (500+ lawyers) and smaller (<500 lawyers) firms, and
3. The comparative data for 2002 survey respondents.

II. Indirect Expenditures: Internal Resources

This section of the survey asked about the human, technological, and other resources that firms are maintaining to support their PD programs.

A. Human Resources: The PD Staff

Here respondents were asked to provide both quantitative and qualitative information about the size and compensation of the PD staff and their professional qualifications. We also asked about staff competencies: the most valuable capabilities of the current staff, and what capabilities the managers would most like to add.

Staff Size

In this section of the questionnaire, we asked how many people staff the PD program, including any practicing lawyers with part-time responsibility for directing it, and what percentage of their time is committed to the program.

From that information we calculated the number of "full-time-equivalent" (FTE) personnel on staff, and the ratio of PD staff to lawyers. For example, one full-time staff member plus two half-time staff members is "equivalent" to two full-time staff members (1 + .5 + .5 = 2 FTE). If the program they run serves 200 lawyers, that's a ratio of 100:1, or 100 lawyers per FTE staff member (200 lawyers divided by 2 FTE staff). The Lawyer:FTE Staff ratio is an important indicator of the depth and breadth of the services provided by the program.

Another meaningful statistic is the ratio of PD total staff to FTE staff. If, for example, 4 people work on your PD program but their time commitments add up to only 2 FTE staff members, your Total Staff:FTE Staff ratio would be 2:1. This is significant because the higher that ratio, the lower your productivity: People are not always available when you need them, PD is typically not their area of expertise, and you are devoting more of your time to staff coordination and communication instead of to PD.

In our experience, the higher both of those ratios, the lower the firm's level of commitment to the PD program. We've seen too many cases where firms try to do PD on the cheap by understaffing it and/or piling it onto the desks of people who are already fully occupied.

The two staffing ratios are charted below in Table 8.

Table 8. Average PD Staffing Ratios

Staffing Ratio	All Firms 2006 (2001)	Firms <500	Firms 500+	Notes
Lawyers:FTE Staff	161:1 (150:1)	146:1	179:1	Range is 57-300 lawyers per FTE staff member. *In 2001 it was 85-301.*
Total Staff:FTE Staff	1.2 : 1 (2.2 : 1)	1.2 : 1	1.2 : 1	Range is 1-3.3 total staff per FTE staff member. *In 2001 it was 1.1 - 7.4 .*

Note in Table 8 that the 2006 respondents reported a *higher lawyer-to-PD staff ratio* than we saw for 2001. But when we split the 2006 respondents by size, we see that the increase has taken place only in the larger firms. We might speculate that the difference results from economies of scale. But it's also interesting to note (see Table 14 below) that our respondents at the larger firms were more likely to view their internal resources as less than adequate.

On the dedicated staffing front, by contrast, PD has made striking gains. Not one single respondent to the 2001 survey had a staff that was 100% dedicated to PD. But in 2006, three out of the 17 respondents did, and several more were very close. None had a nightmare staffing situation like one 2001 respondent, whose PD "staff" of 8 included 6 subordinates whose collective time commitment added up to less than 1 FTE staffer, or several others whose programs were "led" by practicing lawyers, sometimes multiple practicing lawyers, each with no more than a 5% time commitment.

Bottom line on staffing: PD staffs are serving as many (or more) lawyers per capita as before, but with more reliable and professional leadership and support. Good for you!

PD Compensation, Time Commitments, and Qualifications

Besides stepping up their dedicated staffing, in the past five years firms have also stepped up compensation for PD and have started to look outside the legal profession for PD expertise. Some of the more noteworthy developments:

PD leaders making over $250,000 (our top compensation tier):

- *In the 2001 survey, only law firm partners with at most a 30% time commitment to PD were paid over $250K.*

- In 2006, half the program leaders in this top salary bracket were committed 100% to PD, and the median time commitment was 75%.

PD leaders making $150,000 and up (the top three tiers):

- *In 2001, only 40% of the respondents' top PD positions for which compensation was reported paid $150K or more. All of the incumbents in those positions had J.D.'s, and their average time commitment to PD was 46%.*

- In 2006, 70% of top PD leaders made $150K or more, and their average time commitment to PD was 79%. Moreover, 21% of the leaders in this pay range were non-lawyers.

PD leaders and staff making $100,000 and up (the top four tiers):

- *In 2001, only 12% of PD staff making over $100K were in positions below the director or partner level, and 100% of those in this salary range had a J.D.*

- In 2006, 33% of positions at over $100K were below director or partner, and only 56% of the incumbents had a J.D.

Median compensation (that is, half of all positions are compensated above this level, and half below):

- For the top PD positions, median compensation overall is in the $150-199,000 range, or about $175,000. This accords with NALP's 2006 salary survey data showing median compensation of $176,400 for directors of professional development (see *NALP Bulletin*, November 2006, page 12).

- At the median, either (a) having a J.D. or (b) working for a firm of over 500 lawyers is worth an additional $75,000 in annual compensation.

  - PD directors at firms with 500+ lawyers have median compensation of $200-250,000, or about $225,000. At firms with under 500 lawyers, the

median is $100-150,000, or about $125,000; eliminating part-time positions, however, raises the median to $150,000.

- Regardless of firm size, for PD Directors with a J.D., median compensation is in the $200-250,000 range, or about $225,000. For those without a J.D., median compensation is $150,000.

J.D. degrees:

- At the 17 responding firms overall, 70% of top PD leaders at or above the director level, and 27% of PD staff at all levels, have J.D.s.

- At the larger firms (500+ lawyers), 67% of the top PD leaders have J.D.s, and 18% of PD positions overall are occupied by law graduates. At the smaller firms, there are more J.D.s at all levels: 75% at the top, and 41% overall.

Other graduate degrees:

- The larger firms are more than twice as likely to employ people with PD-related graduate degrees (Ph.D. or MA/MS) in a leadership role: 50% of them do, vs. only 22% of the smaller firms.

Other qualifications of PD staffers:

- Legal assistant or legal administrative experience: 37%
- Law practice experience: 26%
- Law teaching experience: 12%
- Other teaching/training/consulting experience: 12%
- MCLE/CLE provider experience: 3%
- PD-Related Certificate: 1%

See Tables 9 and 10 below for more detailed breakdowns by compensation level for leadership and supporting positions, respectively.

Bottom line on compensation and qualifications: Firms are paying their PD professionals a lot more. And they're paying it for PD, not for practicing law with a little PD thrown in on the side.

Table 9. PD Director/Partner Compensation

Annual Compensation	All Firms 2006 only*	Firms <500	Firms 500+	Notes
>$250,000	20%	13%	25%	All PD leaders in this tier had JDs., Their time commitments ranged from 10%-100%, with an average of 65% and a median of 75%.
$200-250,000	25%	0%	42%	Again, all incumbents had JDs. Their average time commitment is 90%, median is 100%, range 50-100%.
$150-199,000	25%	25%	25%	Only 40% of incumbents at this compensation level had JDs. Time commitments ranged from 80-100%, averaging 93% (median 100%).
$100-149,000	20%	38%	8%	Only 20% had JDs. Time commitments ranged from 10%-100%, averaging 75% (median 95%).
$50-99,000	10%	25%	0%	All positions at this salary level were part-time, and all incumbents had JDs.

*Note: In 2001, 86% of the respondents' top PD leaders were partners, and in most cases their compensation was not known by the person completing the survey questionnaire. It therefore is not possible to calculate meaningful percentages broken down by salary level for 2001 (but probably safe to assume that most positions were in the top tier of compensation).

Table 10. PD Assistant Director/Manager and Staff Compensation

Annual Compensation	All Firms 2006 (2001)	Firms <500	Firms 500+	Notes
$100-149,000	16% (4%)	7%	19%	33% of those at this compensation level had JD degrees.
$50-99,000	68% (44%)	79%	64%	6% at this level had JDs.
<$50,000	16% (52%)	14%	17%	No JDs at this level.

Note in Table 10 that even the support staff positions in PD are relatively well paid. This may reflect the overall high pay scales in law firms, rather than being unique to PD. For example, a salary survey of 2,800 members of the American Society for Training and Development across all industries found the median salary at the Director level to be in

the $90-119,000 range, or about $105,000 ("2006 Salary Snapshot: What Drives Pay for Learning Professionals?" *T+D*, January 2007, p. 44). The law firm median is 70% higher (see above, p. 4).

Staff Capabilities

Most Valuable Capabilities. Asked what are the most valuable capabilities possessed by their PD staffs, respondents cited the following:

1. Tied at 35%:
   - Law-related capabilities (Law practice/law firm/legal personnel background and knowledge) *[2001 ranking: 50%]*
   - PD-related capabilities (PD/training/instructional design/HR/event and project management/CLE regulatory knowledge) *[2001 ranking: 8%]*

2. Tied at 12%:
   - Creativity
   - Flexibility/ability to "go with the flow"
   - Work ethic

3. A broad array of generic skills and attributes, each cited by one respondent:
   - Ability to work independently
   - Broad working experience
   - Culturally diverse
   - Enthusiasm
   - Excellent interpersonal skills
   - Good judgment
   - Intellectual curiosity
   - Intelligence
   - Organizational and planning skills
   - Patience
   - Perseverance
   - Responsiveness

Interestingly, the perceived value of law-related capabilities has declined since 2001, when 50% of the respondents rated them most valuable. Now only 35% do.

Conversely, PD-related capabilities have moved up in the rankings: They are considered most valuable by 35% of this year's respondents compared to only 8% of the 2001 survey pool. (However, one-third of the 2001 respondents wanted to add these capabilities to their staffs; perhaps this year's numbers result from their having done so.)

The 2001 respondents generated a "most valued" list of generic skills and attributes that was very similar to the remaining items on this year's list.

Most Wanted Capabilities. Respondents say they would most like to add to their staffs the following:

1. PD-related capabilities: Instructional design/e-learning design/CLE knowledge/teaching experience/program design (35%)

2. Additional administrative support staff (18%)

3. Tied at 12%:
   - Additional staff with PD-related expertise: counseling, organizational development
   - Technology expertise and resources

4. Tied at 6%:
   - Project management and work flow coordination
   - Continued development of current staff

Just as they did in 2001, PD-related capabilities top this year's wish list.

B. Other Internal Resources

We asked what other internal resources are dedicated or available to support the professional development program, and which of those are most and least useful.

Most Common Facilities and Resources

The availability of internal supporting resources for the PD program is shown in Table 11, ranked by frequency. We've expanded the list since 2001, so several new items appear on it. As indicated in the "Notes" column in Table 11, some other resources have increased or declined in availability since 2001.

Table 11. Most Common Internal Resources for PD

Resource	All Firms	Firms <500	Firms 500+	Notes
1. Videoconferencing Facilities	94%	89%	100%	In 2001, at 92% videoconferencing was second in availability to teleconferencing.
2. (Tie) • **Teleconferencing Facilities** • **Intranet** • **CLE Credit for In-House Courses**	88%	78%	100%	In 2001 100% of the respondents had teleconferencing facilities. Intranets and in-house CLE credit are new additions to the resource list this year.
3. Evaluation/Appraisal/Survey System	82%	100%	63%	Another new addition to the resource list.
4. (Tie) • **Specialized Meeting Space** • **Internal Catering** • **CLE Self-Study Collection**	71%	56%	88%	75% of the 2001 respondents had specialized meeting space, and only 50% had a CLE self-study collection. Internal catering is a new addition to the list.
5. CLE Tracking & Compliance System	59%	44%	75%	A new addition.
6. (Tie) • **Course Archiving/eLearning Conversion** • **Calendar of Public CLE Courses**	53%	44%	63%	Both new additions.
7. Web-based "Virtual Meeting" Facilities	47%	44%	50%	Usage has nearly doubled since 2001, when 25% said they used such facilities.
8. Learning Management System	12%	11%	13%	New.
9. Assignment Tracking System	6%	11%	0%	New.

We were pleasantly surprised to see both e-learning conversion and learning management systems in the smaller firm as well as the larger firm repertory.

Most and Least Useful Internal Resources

Several respondents mentioned more than one resource as being their most useful. The resources are listed in Table 12 in order of the number of respondents listing them.

Table 12. Most Useful Internal Resources for PD

Resource	All Firms	Firms <500	Firms 500+	Notes
1. Evaluation/Appraisal/Survey System	29%	33%	25%	Three respondents identified viDesktop as their system.
2. (Tie) • **Specialized Meeting Space** • **Videoconferencing Facilities** • **CLE Credit for In-House Courses** • **CLE Tracking & Compliance System**	18%	11%	25%	In 2001, meeting space was the top-ranked internal resource, voted most useful by 42%. Videoconferencing was second at 25%. (CLE credit and tracking are new this year.)
3. Course Archiving/e-Learning Conversion	12%	11%	13%	(New this year.)
4. (Tie) • **Teleconferencing Facilities** • **Learning Management System**	6%	0% 11%	13% 0%	Teleconferencing was not at all favored by the 2001 respondents (see Table 13). (LMS's are new this year.)

Table 13. Least Useful Internal Resources for PD

Resource	All Firms	Firms <500	Firms 500+	Notes
1. (Tie) • **Videoconferencing facilities** • **CLE Self-Study Resources** • **Calendar of Public CLE Courses**	12%	11% 11% 22%	13% 13% 0%	Comments on videoconferencing: "I prefer teleconferencing"; "insufficient videoconf. space." Videoconferencing and CLE self-study also tied with teleconferencing for first (worst) at 17% in 2001. (The CLE calendar is new to the list.)
2. (Tie) • **CLE credit for in-house courses** • **Teleconferencing** • **Intranet** • **Virtual meeting facilities**	6%	0% 11% 11% 11%	13% 0% 0% 0%	Teleconferencing tied for first (worst) in 2001. The others are new.

It's interesting to see the overlap in the "Best" and "Worst" lists in Tables 12 and 13: Videoconferencing, teleconferencing, and CLE credit for in-house courses appear on both lists. Comparing the percentages, evidently teleconferencing is more successful at the larger firms, and videoconferencing somewhat more successful there as well, while experience with in-house CLE credit is mixed.

C. Internal Resources Overall: Adequacy and Needs

Finally, we asked how adequate overall are the staff and other internal resources available to PD, and what one thing the respondents would change if they could.

Adequacy of Resources

The respondents find their internal resources less adequate than their purchasing budgets:

While 67% of respondents viewed their *purchasing budgets* as "moderately less than needed," none saw them as "substantially less than needed" (see February issue, pp. 5-6). By contrast, 83% saw their *internal resources* as inadequate: 71% as "moderately less," and 12% as "substantially less," than they needed. See Table 14 for the breakdowns.

Table 14. **Adequacy of Current Internal PD Resources**

Adequacy	All Firms 2006 *(2001)*	Firms <500	Firms 500+	Notes
Substantially more than needed	0% *(8%)*	0%	0%	Five years ago, 41% of our respondents saw their internal PD resources as adequate or better, compared with 18% today.
Moderately more than needed	0% *(0%)*	0%	0%	
About right	18% *(33%)*	33%	0%	
Moderately less than needed	71% *(58%)*	56%	88%	83% of this year's respondents, including 100% of the larger firms, see their resources as inadequate.
Substantially less than needed	12% *(0%)*	11%	13%	

Most Wanted Resources

Ten of the 17 Part 2 respondents answered our question, "If you could change just one thing about your internal staffing and resources, what would it be?" Nine of them (90%) wanted more staff:

- Five wanted generic or administrative helping hands (e.g., "One additional full time staff person dedicated to professional development"),
- Two wanted to add specialized positions: "Someone focused on the internal training logistics" and a "Distance learning specialist – someone to manage our online subscriptions and create our own e-learning tools", and

- Two wanted more staff as part of additional unspecified resources, one at the practice group level and one in offices outside the main office.

The remaining respondent wanted "one war room where we all could work collaboratively and where there is a central area to track the day-to-day happenings of PD."

In 2001 only 70% of those answering this question said they wanted more staff. The rest wanted improved technology resources (apparently the most pressing technology issues have been resolved since 2001), dedicated classroom space, and a library of self-study resources.

III. Results

Finally, our survey asked about results: What return are the respondents getting on their investment in PD? We asked about:

- Attendance at and evaluations of in-house courses, and what other feedback is collected on them;
- What other components of the PD program are evaluated; and
- What the combined feedback shows about the program's impact on job performance and its overall value to the organization.

A. In-House Courses: Feedback and Results

In-house training has consistently been the component of law firm PD programs receiving by far the most emphasis and funding. We have therefore tried to pin down some meaningful indicators of its quality and effectiveness, and what processes the respondents themselves are using to assess its quality and effectiveness.

One indicator of quality as perceived by the target audience for training is their level of attendance at courses and, as a possible factor skewing attendance, whether it is voluntary or required. Another is evaluation ratings and other feedback sources.

Actual Attendance as a Percentage of Target Attendance

We asked the respondents how many participants would typically be expected to attend a major in-house course, and how many actually attend. Eleven respondents provided these numbers, producing an overall average of 83% of target attendance. The smaller firms at 87% did better than the larger ones at 76%, but both numbers are quite respectable. (They pale, however, beside the 2001 respondents' reported average of over 100% of target attendance.)

Mandatory vs. Voluntary Attendance

We asked the respondents whether they mandated attendance at any of their in-house courses, and if so, for whom.

- **First-year associates**, and especially those at the larger firms, are the most common subjects of a mandatory attendance policy: 53% of the respondents overall, and 67% of the larger firms (vs. 44% of the smaller) require their attendance at some or all first-year course offerings. One larger firm mandates attendance through the third year at "Required litigation and transactional programs for 1st through 3rd year associates in those groups."

- **Lateral hires** are the second most likely mandatory attendees, but only at the smaller firms and only at a minority of those: 22%.

At four additional firms (24%), it "depends on the programs." One respondent added: "More often we offer 'strongly encouraged programming' rather than mandatory."

In 2001 it appeared, perhaps counter-intuitively, that there might be a negative correlation between mandated attendance and actual course attendance, without indicating the direction of causality (was attendance being mandated because it was low, or was it low because the lawyers resisted being forced to attend?). This year's data suggest no correlation, either positive or negative.

Evaluations and Other Feedback

All 17 respondents collect and compile evaluations from the participants for at least some of their in-house courses, and the average participant evaluation falls in the top 20% of the evaluation scale. See Table 15 for the details on the 2006 respondents. (Vague estimates by some 2001 respondents did not permit the calculation of averages.)

Table 15. Participant Evaluations of In-House Courses

Course Evaluations	All Firms	Firms <500	Firms 500+	Notes
Average % of Courses Evaluated	80%	76%	85%	Range is 5% to 100%. Ten respondents (59%) compile participant evaluations for 100% of their courses.
Average Evaluation Rating*	82%	83%	80%	Range of ratings is 75-88%.

*Note: Reported evaluation ratings were converted to percentages to provide a common measure. For example, a rating of "3" on a 4-point numeric scale, or a rating of "Good" on a 4-point scale of "Poor/Fair/Good/Excellent," was converted to 75%. Likewise, on the foregoing scales, a rating of 3.5, or one midway between "Good" and "Excellent," would be 88%. A rating of "4" on a 5-point scale would be 80%.

These evaluation ratings are encouraging, though not necessarily significant because studies have shown that training participants in organizations tend to be lenient in their ratings. Because of that, to validate the quality and effectiveness of training, it is recommended to use other feedback sources as well.

Table 16 on the next page charts the most common feedback sources for in-house courses, in order of the frequency of use.

Top-Rated In-House Courses

The survey asked whether any particular types of courses were rated higher than others, and if so, which ones.

Just as in our 2001 survey, the highest-rated in-house courses are variously characterized by the respondents as "interactive," "hands-on," "Learn by Doing," and "Skill building sessions." One respondent each additionally characterized their most successful in-house courses as:

- "Programs where we bring associates together from around the firm to interact with colleagues – e.g., leadership programs for specific associate level."

- "Not by type, but it does seem that sessions in which the faculty make a strong connection with the students rank higher than classes in which the content may be better but the connection is weaker."

Only two respondents identified specific topics; they mentioned:

- Accounting & Finance
- Negotiations Training
- Presentation & Public Speaking
- Supervision/delegation
- Trial Advocacy/Mock Trials

Most Significant Contributions of In-House Courses

Respondents say that their course evaluations and other feedback tell them that in-house courses add value for participants and the firm in the following ways:

1. *Continuous learning and skill development.* Some of the comments:

Table 16. Sources of Feedback on In-House Courses

Feedback Source	Average Frequency Rating*			Notes
	All Firms 2006 (2001)	Firms <500	Firms 500+	
Participant evaluations	1.9 (N/A)	1.9	1.9	See also Table 15. The ratings at left were derived by converting the percentage of courses evaluated by each respondent to this table's 3-point frequency rating scale: 50-100%=2, 10-49%=1, <10%=0.
Informal participant feedback	1.8 (1.7)	1.7	1.9	Only 1 respondent, a smaller firm, does not collect informal feedback from participants; 2 respondents collect it only occasionally.
Exit interviews	1.5 (1.2)	1.7	1.3	Three of the larger firms (38%) do not use exit interviews to collect training feedback. All 9 of the smaller firms use them at least occasionally.
Informal supervisor feedback	0.9 (1.0)	0.8	1.0	Three larger and two smaller firms(29% overall) regularly obtain training feedback from supervisors.
Faculty evaluations	0.8 (1.0)	0.9	0.6	Just over half (53%) the respondents collect faculty evaluations; 24% get them regularly. One larger firm commented this is done only "for major programs."
Employee surveys	0.7 (0.8)	0.7	0.7	Again, just over half (53%) use employee surveys for training feedback, but only 18% regularly.
Performance appraisals	0.5 (0.7)	0.4	0.6	Two larger firms are the only regular users of appraisals to assess training effectiveness; 5 other respondents use it occasionally.
Client surveys	0.2 (0.0)	0.3	0.0	One-third of the smaller firms, and none of the larger ones, get occasional training feedback from client surveys.
Financial data	0.1 (0.4)	0.2	0.0	Two smaller firms check financial data occasionally.
Post-course testing	0.0 (0.0)	0.0	0.0	No respondent does post-course testing.

*Note: Frequency ratings are averaged from respondents' ratings of "Rarely/Never (0)", "Occasionally (1)," and "Regularly (2)."

- "Provide a strong substantive law education for attorneys"
- "Communication of significant knowledge in an efficient manner."
- "Higher comfort level regarding base of training."
- "Help identify internal resources."

2. *Creation of a sense of community; integration and "bonding."* One

respondent commented, "They have been absolutely essential to the integration of the firm [which is the] product of several merged entities, much lateral recruitment."

3. *Enhanced morale*

4. *Improved client development/ client service*

5. *Satisfaction of mandatory CLE requirements*

6. *Communication of the firm's expectations*

One respondent added, "Results, however, are not measured." Another noted, "Unfortunately, we really don't measure past Level 2 so it's hard to know for certain whether the classes have a long-term effect." Indeed, Table 16 shows that few respondents measure past Level 1 – that is, past the impressions of the course participants, including faculty – whether collected as formal evaluations or informal feedback, or in exit interviews. That is useful information, but note the same as verifying that the participants actually learned what the course was meant to teach (Level 2), applied that learning on the job (Level 3), and, as a result

of applying it, produced positive business results for the firm (Level 4).

B. Evaluation of the PD Program as a Whole

The percentage of respondents who evaluate at least one other component of the PD program besides in-house courses has declined since 2001 (53% in 2006, down from 67% in 2001). But those who do are focusing closer attention on their mentoring and performance appraisal programs than past respondents. (Perhaps the greater scrutiny of mentoring goes hand-in-hand with the markedly increased spending on it – see February issue, Table 5, "2006 Average PD Program Expenditures," and the associated discussion on page 9.)

Table 17. PD Program Components Evaluated by Responding Firms

Program Component	All Firms 2006 *(2001)*	Firms <500	Firms 500+	Notes
In-house courses	100% *(100%)*	100%	100%	See Tables 15 and 16 for details.
Mentor program	47% *(25%)*	56%	38%	Almost twice as many firms now evaluate mentoring.
Performance appraisals/ associate evaluations	29% *(17%)*	22%	38%	Again, close to double the 2001 rate.
Orientation program	12% *(17%)*	0%	25%	A decline since 2001.
Other components, each mentioned by one 2006 respondent: • **Annual associates retreat** • **Associates Committee** • **Career planning workshops** • **One-on-one training** • **Work assignment systems**				None of the items at left were mentioned by any 2001 respondents. Items mentioned in 2001 but not this time around were: • Compensation/bonus system • Service delivery by the PD office • Support staff training (in 2006, PD is much less likely to serve the support staff – see February issue, p. 7)

One larger firm said it evaluates all components of its PD program. Another conducts a "Firmwide Client Service Survey ... every year where aspects of the Lawyer Development function are evaluated...." A smaller firm that is just starting its program plans to evaluate the components "as they are rolled out."

Strongest and Weakest Components of the PD Program

This section of the survey questionnaire asked which program components (a) have the greatest positive impact, (b) generate the most upper management enthusiasm, (c) are most in need of improvement, and (d) might be eliminated. We also asked what purchases or resources have made the greatest positive difference to the PD program.

The answers to each question are ranked below in order of the frequency with which they were mentioned.

Has the greatest positive impact on individual competence and performance:

1. In-house training, especially skills training and "hands-on" training (10 respondents).
2. Tie (2 respondents each):
   - Mentoring program
   - On-the-job training, including the assignment process and supervisors' one-on-one training and feedback
   - Performance appraisals/evaluations

3. Other components, each listed by one respondent:

   - Best Practices initiative
   - Career development programs
   - Consulting services to practice groups
   - First Year Academy

Training was also the hands-down winner in 2001.

Generates the most upper management enthusiasm:

1. In-house training generally, and specifically training on leadership, ethics, core competencies, business development and lawyering skills; training for new

associates; and programs by outside speakers (8 respondents).

2. Other components, each mentioned by one respondent:

   - Best Practices initiative
   - Career development programs
   - Consulting services to practice groups
   - Evaluation process
   - General all-hands meetings
   - MCLE courses for clients
   - Rollout of core competencies
   - Work assignment processes

Training was also No. 1 on the 2001 respondents' list of management-backed programs.

Most valuable purchases/resources for the PD program:

1. viDesktop (4 respondents). Comments:

   - "[A]llows Associate Review Committee to more effectively analyze feedback provided."
   - "[H]as been a great purchase."
   - "[H]as enabled us to solicit and review information and data in a manner that is easy for all to use. Together with our internal LMS, we can track a tremendous amount of data with very little effort."

2. Reqwired (3 respondents). Comments:

   - "[A]bility to track CLE more effectively, and generate reports."
   - "[T]errific ways to add value for our associates." (Refers to both Reqwired and viDesktop)

3. Partner support (2 respondents):

   - "Partner enthusiasm to serve as faculty."

- "Chair of Associates Committee who is passionate about associate affairs and professional development."

4. Listed by one respondent each:

   - Additional staff, "which is allowing us to create better programs, follow through on P.D. initiatives."
   - Classroom facility: "An on-site facility for courses, together with the related audiovisual equipment. Apart from the cost savings, our lawyers have responded very positively to the convenience of an on-site room and to what they describe as an improved, more intimate ambience from the use of that room."
   - PLI (with no further comment)
   - Video-recording capability, "so [programs] can be subsequently viewed at attorneys' desktop. Extremely helpful as a way to integrate lateral associates."
   - West LegalEdCenter for "the availability of CLE and professional development programming 24/7."

This question was new to the survey this year.

Most needs improvement:

1. In-house training generally and, more specifically in some cases, consistency/curriculum integration across all offices, "talking head" seminars, departmentally run classes, and transactional skills programs/practical skills for business and transactional lawyers (8 respondents).

2. Tie (3 respondents each):

   - Mentoring
   - On-the-job training, including one-on-one training, project evaluation program, and supervision

Training and mentoring have switched places since 2001, when 50% of the respondents cited their mentor programs as the PD component that most needed improvement. (Perhaps the increased investment in mentoring in the intervening 5 years, as noted in Part 1, is starting to pay off.) This year nearly 50% view training, or some aspect of it, as the program most in need of fixing.

Might be eliminated:

As in 2001, no one called for elimination of any component of the program. One 2006 respondent, however, noted that she would "like to lessen the focus" on in-house training.

Most Valuable Contributions of the PD Program

We asked (a) what overall has been the greatest value or contribution of the respondents' PD programs, and (b) on what evidence that assessment is based.

Unlike 2001, when the responses to this question overwhelmingly emphasized enhanced lawyer competence as the PD program's top "value added," this year's answers ranged more widely. As in 2001, however, few could cite objective evidence for their conclusions.

The 2006 rankings, and associated respondent comments:

1. Tie (3 respondents each):

   - *Stronger firm ties.* Respondents noted as top contributions "The connection of associates to one another and the firm as a whole," that "the program was ... an important integrator ... and continues to contribute to the professional and social networks in the firm," and the "retention of

associates through ... mentoring and relationship building." One respondent, in one of the few nods to our request for supporting evidence, said she had "no empirical evidence."

- *Lawyer career development.* "Career development counselling of associates." "Introduction of performance benchmarks, Firmwide Development Retreats..." "Has created an environment in which our lawyers continuously evaluate what it takes to 'move to the next level.'" (The latter conclusion is based on "regular feedback.")

2. *Associate support and satisfaction* (2 respondents): "Associate satisfaction and partner support"; "Using our knowledge of PD to become a focal point for associates on other matters."

3. One mention apiece for:

- *Management of assignments.* "Design and implementation of formal work assignment process. Evidence: tracking and measuring of skills development and related attrition."

- *Partner accountability for associate development.* "[E]mphasis on individual partner responsibility and impact."

- *Partner confidence in associates' competence.* "An increased sense of confidence in the base of skills and knowledge which associates can be presumed to have. This is based on feedback from senior management and senior lawyers."

Most Wanted Change in the PD Program

The final question on the survey was this: "If you could change just one thing about your

professional development program overall, what would it be?" Eight respondents answered it, and targeted the following areas for change:

1. *In-house training* (4 respondents):

- "Get more control of some of the local content."
- "Improve delivery of training informally throughout offices outside of headquarters."
- "More attorney involvement in design and delivery of programs."
- "More disciplined preparation by senior lawyers in planning, preparation and delivery of in-house courses."

2. *Level of staffing and other resources* (2 respondents):

- "I would add resources (personnel, particularly)."
- "More staff."

3. Tie (1 respondent each):

- *Associate accountability/ownership*: "We plan to introduce Development Plans to our Associates this year with the expectation that they will embrace this idea and take more ownership of their own professional development."

- *Partner accountability/commitment*: "We would [like to] be able to help change the firm's culture to encourage more investment by partners in more junior attorneys' development. Right now there is too much reliance on PD to provide all of the solutions."

In-house training, and staffing and other resources, were the top two change issues for the 2001 respondents as well.

IV. Conclusion

PD has come a long way in a few decades. Your author can personally testify to that.

I was one of the first full-time PD managers in the United States in the early 1980's. At the time, it caused consternation for some partners in the firm, who saw my job as an utter frill, that I was paid more than a legal secretary. My support staff consisted of what little time could be spared by the secretary to a prominent partner at the firm; when that repeatedly proved insufficient, I was assigned a second partner's secretary, after which I shuttled back and forth on a well-worn path between the two trying to get the paperwork done. Conference rooms reserved in my name for major training sessions were pulled without warning by partners for their own meetings.

By 1990, when the Professional Development Consortium was founded, there were perhaps 25 of us in the country, not all of us dedicated full-time to PD. Today, over a thousand of the firms that list in the National Association for Law Placement's *Directory of Legal Employers*, and virtually 100% of the largest firms, say they have a PD staff (*NALP Bulletin*, May 2007, p. 18).

Just since 2001, as this report shows, PD has made tremendous strides -- gaining significantly more funding, expanded programs and functions, more staffing and other resources, higher compensation, and, best of all, greater competence and professionalism. Moreover, the technology issues that bedeviled our 2001 survey respondents have melted away to such an extent that now technology tools are cited by many as their program's most valuable acquisitions.

Still, it behooves us not to rest on our laurels. There is much work still to be done. Two very interesting works in progress are the recent trends toward establishing competency models as the basic framework around which all PD functions are organized, and toward leadership development for partners, including everything from leadership of case teams to executive leadership of the firm. We plan to observe and report as those trends mature.

We are surprised, however, that one pronounced trend in other industries has so far not gotten off the ground in law firms. That is the trend to try to measure, in some fashion, the returns on the organization's human capital investments.

We don't agree with the notion that PD needs to be "justified" in any real sense – a law firm's human capital is its most, indeed its only, essential asset and warrants careful tending. We also agree that it is difficult to untangle PD's contributions from other influences on performance in order to "measure" its benefits to the firm.

Even so, we should be using the tools available to make some connection between the inputs and the outputs – to confirm what works, what doesn't, and where we are getting the best bang for our buck, and also to avert any suspicions that our staffs and budgets are bloated. Such suspicions tend to surge with every recession.

Indeed, it is exactly when times are tough that PD expertise can make its greatest contributions: Helping retool competencies in a changing environment, reinforcing the competencies that are still valuable, and preserving the sense of community that sustains everyone's commitment to the effort.

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The Hastings Leadership Academy for Women: A Program Whose Time Has Come
Ida Abbott

The lack of women lawyers in positions of law firm leadership is alarming. Over several decades, women lawyers have represented a significant number – now close to half - of law firm associates. Yet today women comprise fewer than 16% of all law firm equity partners, only 16% of management committee members, and only 5% of managing partners.[1] A sizable number of law firms have no women in charge of offices or practice groups.[2] This striking under-representation of women in law firm leadership means that management, policy and strategy decisions that affect the careers and compensation of women in law firms are being made almost exclusively by men.

It is time to turn this situation around. Making more women partners is a crucial first step. The next step is to ensure that women who do become partners receive the rewards and recognition they deserve and are placed into roles where they can have an impact on firm management and direction. One way to do this is to prepare women partners for leadership positions by giving them the skills, knowledge, techniques, and support that will enable them to achieve their highest potential as leaders in their firms, communities, and profession.

That is what we plan to do at the Hastings Leadership Academy for Women, the first leadership development program designed exclusively for women law firm partners. This unique course is designed specifically to address the leadership challenges faced by women in law firms. The educational curriculum will address those challenges within the political and economic context of law firms. Participants will learn how to attain leadership positions, utilize their influence, authority and power in constructive ways, and become role models and catalysts for positive change.

Why focus on women partners? Even at the partner level, women continue to face bias and stereotyping that undermines their advancement into leadership positions. They also face unique conflicts and pressures because of their gender. Not only do they have more responsibilities at home than men, associates expect women partners to be more active mentors and role models, and to be more sympathetic and supportive, than their male counterparts. Moreover, women are less likely than men to promote their self-interest and consequently, are compensated less than men.

Women who become law firm partners have demonstrated leadership abilities and talents over many years of practice. They have worked extremely hard, made a strong commitment to their careers, and proven their staying power. But to become recognized as leaders in today's law firms, women partners must be able to succeed within a male-oriented culture. They may want that culture to change, but first they have to muster the clout necessary to influence and direct the change. To do that, women partners must learn how to play - and win - the leadership game. They need to become politically savvy, find influential mentors and champions, build powerful alliances, and negotiate effectively on their own behalf for full compensation and client credit. And they need to develop authentic and effective leadership styles – as women,

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[1] *National Association of Women Lawyers' First National Survey on Retention and Promotion of Women in Law Firms*, October 25, 2006 (www.nawl.org)

[2] *2005 Vault/MCCA Guide to Law Firm Diversity Programs*

not as "men in skirts" – that are effective in spite of the biases and conflicting expectations that they face.

This is no small task. That is why the Leadership Academy is designed to give women partners the tools, confidence and support to help them persevere and succeed. And while the focus of this program is on women's career advancement, law firms will be major beneficiaries. Women partners constitute a vital and valuable pool of talent. Their leadership is essential to the long-term success of the firm in every aspect of management, client relations, and lawyer hiring and retention. Firms that fail to optimize the leadership potential of women partners are wasting – and losing – a critical resource.

The Hastings Leadership Academy for Women is sponsored by the Project for Attorney Retention at the University of California Hastings College of the Law in San Francisco. It is a six-day course that takes place in two intensive three-day sessions, May 31 - June 2 and July 19-21, 2007. The program's rigorous coursework is bolstered by one-on-one consultations with leadership coaches. In session one, participants will develop and begin to execute their own personal leadership plans. In session two,

they will again meet with their coaches to review their progress and refine their leadership plans. They will also work closely with other program participants to give each other feedback during the sessions and ongoing support thereafter.

Registration for the Leadership Academy will be limited to keep the group small and allow for meaningful dialogue, hands-on learning, and interaction with faculty and peers. Further details about the Leadership Academy and registration information are available at http://www.uchastings.edu/site_files/WLL/LAW brochure.pdf.

Ida Abbott is President of Ida Abbott Consulting LLC (www.IdaAbbott.com), which helps clients manage, develop and retain talented lawyers. She is the co-founder and Director of the Hastings Leadership Academy for Women at Hastings College of the Law. She is a Fellow of the College of Law Practice Management, Vice-Chair of the Academic and Professional Development Committee of the International Bar Association, and on the Advisory Committee of the Women in Law Empowerment Forum. Ida is the author of several books on mentoring and professional development, and publishes an electronic newsletter, Management Solutions. She can be reached at IdaAbbott@aol.com or 510-339-6883.

Quote of the Quarter:

"[W[hat I see in our large organizations is that there has been a devastating return to command and control after 9/11. The misconception seems to be that in high-risk times we need high-control leadership. I have done a lot of work with the U.S. Army and heard from soldiers who have been in Iraq and Afghanistan about what leadership is really like in high-risk situations such as battle – it's completely self-organized and dependent on the decisions of every soldier. I don't know when we're finally going to understand that people are the ultimate resource, and that the only way to succeed is to engage the intelligence of everyone."

– Margaret Wheatley, author of *Leadership and the New Science*, in *T+D*, May 2007.

PD Job Descriptions

The compensation figures reported in this issue may raise a question for any firm thinking of starting a PD program: What is the difference between a Director of Professional Development and a PD Administrator or Coordinator? What role might each be expected to play, what contributions might s/he be expected to make?

The following sample job descriptions highlight some of the possible comparisons in the qualifications and compensation for, and the roles and responsibilities of, the two types of positions. Of course, capabilities and duties will vary with the firm and the incumbent.

– Gaye Mara

Comparative Job Descriptions

PD Administrator/Coordinator	PD Director/Chief PD Officer
Qualifications	
A "bright beginner" in PD with some transferable skills. Ideal candidate has a BS/BA, 2+ years of previous administrative experience in a law firm, and strong customer service and organizational skills.	A seasoned PD professional. Ideal candidate has a graduate degree in law and/or adult education/human resource development, and 5+ years of experience in creating and implementing training and development programs and resources for professionals.
$50-90K　　**Salary Range**　　$100-300K	
Support (Staffing ratio: 1 PD staff member per 100 lawyers)	
Clerical assistance for producing and distributing reports and course materials, data input, recordkeeping, filing. Designated liaisons in each office and practice area. Membership in National Association for Law Placement and attendance at its Newer Professionals Forum for PD. PD reference library, including *Professional Development Quarterly* and *Lawyers' Professional Development: The Legal Employer's Comprehensive Guide.*	Administrative assistance for managing program logistics and resource materials, CLE credit applications; clerical assistance as for Position 1. Designated liaisons in each office and practice area. Membership in Professional Development Consortium. Library of PD references identified by incumbent; space for incumbent's personal PD library.

Reporting Relationships	
Reports to Director of PD, Legal Personnel, or Human Resources. Supports a PD Chair and/or Committee; provides input to and implements their decisions. Supervises assistant and/or secretary.	Reports to Executive Committee or Managing Partner. Regularly consults to and collaborates with firm and practice area leaders to develop and revise PD initiatives. Supervises other PD staff.
Possible Roles and Responsibilities	
Program Development and Oversight. Support PD Chair/Committee and/or outside consultant in planning, developing, and implementing PD program. Supervise or perform all regular program functions.	*Program Development and Oversight.* In collaboration with firm leadership, assess firm's learning and performance needs, and design and implement a comprehensive program (or revise an existing one) to meet them. Monitor & revise program as needed; supervise PD staff.
Education, Training, and Orientation. Coordinate scheduling, logistics, distribution of materials; serve as point of contact with contracted outside presenters and as staff support to internal presenters; collect, compile, and report program evaluations and recommend program revisions; arrange and track CLE credits.	*Education, Training., and Orientation* Assess learning needs and design curricula; for appropriate subjects, design and/or deliver program content and/or materials; select and contract with outside trainers; select, recruit, and coach internal faculty; revise/update curriculum as needed.
New Lawyer Integration. Serve as point of contact for new arrivals and coordinate exchanges of administrative information.	*New Lawyer Integration.* Design and implement processes to facilitate integration of new lawyers into the firm's practice and internal and external relationships.
Resources for Information and Self-Study. Purchase pre-approved resources; serve as staff support for others' development of internal resources; organize, maintain, and coordinate access to the resources and track their utilization.	*Resources for Information and Self-Study.* Determine what resources are needed, identify and evaluate those to be purchased, and develop or oversee development of internal resources.
Outside CLE. Compile and publish a regular schedule of authorized CLE courses in the firm's areas of practice; track course attendance, expenditures, and evaluations.	*Outside CLE.* Develop CLE budget and guidelines for approval. Select or help develop CLE tracking system.
Mentor Program. Match mentors and mentees under established system; track and report participation.	*Mentor Program.* Develop matching system, coach mentors and mentees, monitor program effectiveness.
Performance Appraisals. Administer form distribution and collection, recordkeeping, and file maintenance and control; review evaluation ratings and comments for patterns revealing training and other needs and recommend followup actions.	*Performance Appraisal.* Review and update evaluation criteria, procedures, and materials; coach evaluators and/or assist in preparing and delivering evaluations; initiate appropriate followup on training and other needs revealed in evaluations.
Departures/Terminations. Serve as point of contact for outplacement consultant. Coordinate departure arrangements.	*Departures/Terminations.* Select outplacement consultant. Conduct exit interviews of departing lawyers, analyze results, and initiate appropriate followup actions.
Career Development. Refer lawyers to appropriate resources. Coordinate new partner orientation and training events and materials.	*Career Development.* Develop a system of competencies and/or performance benchmarks for career planning. Develop new partner orientation and training program; coach presenters.

Department Managers and Practice Group Chairs: What They Do, What They Need

Stephen R. Chitwood and Evelyn Gaye Mara

(**Editor's Note:** This article was first published in the November 1999 issue.)

Department managers, known in some firms as practice group chairs, fulfill a key role in the day-to-day operations and long-term success of every practicing law office. They link the grassroots of the firm with central management. In addition, they typically generate legal work of great value for most of each day and, at the end of the day, assist their colleagues to do the same.

With the right preparation and support, department/practice group managers can make a significant contribution to the firm and their department while achieving tremendous personal growth and satisfaction. Without such preparation and support, however, they will perform poorly to the detriment of the firm, or perhaps adequately but at excessive personal cost, making it hard for the firm to fill their position in the future.

Let's consider what is expected of department/practice group managers in most firms, the challenges they face in trying to meet those expectations, and how a firm can help its managers to succeed, thereby ensuring its own success.

The Expectations: Typical Responsibilities

Most law offices expect their department/ practice group managers to fulfill most if not all of the following responsibilities:

Resource Allocation and Management

1. Ensure an appropriate and fair distribution of work among associates.
2. Monitor the ongoing workload of associates.
3. Negotiate, and help resolve disputes regarding, work allocation.
4. Determine needed staffing and allocate attorneys for specific engagements.
5. Develop strategies to improve department productivity.

Resource Development: Hiring, Training, Evaluation, and Coaching

6. Evaluate associates during their first year with the firm.
7. Provide input to the annual evaluations of partners and associates about whom they have first-hand knowledge.
8. Ensure the training of associates, especially first-year associates.
9. Give feedback to partners on their performance (e.g., billable hours, client development, profitability), and assist partners whose performance has declined.
10. Monitor carefully the work of associates who have been placed on probation or identified as experiencing performance problems.
11. Recruit new associates and lateral hires to fill vacancies and/or expand the practice.

Administrative Management and Communications

12. Monitor group financial performance in conjunction with the firm's Financial Management Committee (including billings, receivables and collections, and some oversight of expenditures for CLE, client development,and travel).
13. Address administrative details and make decisions about the day-to-day operations of the group.

14. Oversee the intake of new clients with particular reference to fee arrangements, retainers and related matters.
15. Promote group communications and information dissemination through regular meetings and other activities.
16. Meet about every two weeks with the Managing Partner on status and new developments, and confer day-to-day with the Managing Partner and other department heads on operating issues as they arise.
17. Provide the Executive Committee with quarterly reports on department operations.

Client Relations and Practice Development

18. Promote client development efforts by partners and senior associates.
19. Provide visibility and leadership to promote the group's practice in and outside the firm.
20. Maintain contact with the group's clients to monitor their satisfaction with the firm.
21. Negotiate and help resolve differences with existing clients.

Client Legal Work

22. Commit 75 to (preferably) 85 percent of their time to legal work for their own clients.

The Challenges: Issues to Be Resolved

In most firms a number of issues must be resolved with firm-wide management, other partners, and firm clients for the manager to be successful.   Those issues include:

1. **Balancing managerial tasks and law practice.** The common expectation is that the department/practice group manager will spend no more than 15 to 25 percent of his or her time on managerial responsibilities (15% is preferred). Considering the many administrative tasks to be done, little time is left for the more creative and challenging strategic aspects of the job. Other possible problems are loss of the manager's existing client base or inability to expand it while in the position, and difficulty revitalizing his or her practice upon leaving the position.

2. **Role redundancy.** Some departments are groupings of various legal practices, with a senior partner from each practice acting as a *de facto* practice head. In this situation, what value is added by the position of department/practice group manager?

3. **Unclear and/or unpublished responsibilities.** Partners assuming the position of department/practice group manager rarely have carefully written job descriptions detailing their responsibilities or authority, and often must learn their roles through informal discussions and observation. The result is frequently a lack of clarity throughout the firm about the role, which hinders the new manager's ability to succeed and increases the likelihood of conflict with partners and associates in the group.

4. **Limited evaluation authority.** Department/practice group managers often believe they should have significant input into the evaluations of partners and associates within their departments. More specifically, they think the evaluation committees should consult them after all performance information has been gathered and before final evaluations are made. Evaluation committees, on the other hand, are more inclined to treat the managers on a par with other evaluators.

5. **Differing expectations about financial authority.** Department/practice group managers believe they should have significant input into the development of their departmental budgets, and often feel their budgets have little relationship to the financial needs of their departments. At the same time, individual managers may differ

significantly regarding their responsibility for managing the CLE, travel, and client development expenses of partners and associates. Some believe they must watch these expenses carefully, while others take a more relaxed attitude in the belief that their job is primarily to prevent abuse.

6. ***Insufficient time to develop plans and initiatives.*** As mentioned above, the combined pressures of day-to-day administrative tasks and the manager's own legal practice severely limit the time available for developing plans and initiatives to improve department performance and productivity. If the department/practice group managers do not think about these improvements, who will?

7. ***Training of Associates and Younger Partners.*** While some department/practice group managers devote significant attention to associate training, more often such training is uneven because no one in the firm is accountable for it. Similarly, while young partners may have learned much about the firm and law practice as associates, partnership requires a new perspective and skill set and therefore additional training, particularly on client development and other new responsibilities. Should the department/practice group manager be responsible for associate and young partner training? If so, what is the scope of this responsibility?

8. ***Pros and Cons of Younger Managers.*** What should be the criteria for selecting a department/practice group manager? Some firms seek younger partners for the position, an approach which has both advantages and disadvantages.

Advantages:

- Development of a substantial group of future firm leaders.
- Instilling a sense of the business dimensions of law practice in younger partners and emphasizing the

importance of such concerns to the firm's future well-being.
- Utilization of the expertise of younger partners before they have developed their practices to such an extent they cannot take on management responsibilities.

Disadvantages:

- Managerial responsibilities restrict the time younger partners need to build their practices.
- Younger partners may have difficulty leading older and more experienced partners to undertake new activities or practices.

- Younger partners may be unwilling to confront older partners about following firm practices, which may require the Managing Partner or Executive Committee to become involved.
- Younger partners may lack the status needed to work with particular clients of the group.

How A Firm Can Help Its Department/ Practice Group Managers to Succeed

A firm that understands the challenges facing its practice chairs can help them in several ways:

1. ***A Position Description with Clearly Stated Responsibilities and Authority.*** Individual department/practice group managers may emphasize different aspects of the job because of differences in their personalities, practice expectations, and personal styles. Still, a common set of expectations regarding specific responsibility and authority for all department/practice group managers is a minimal requirement. This would eliminate much of the ambiguity that often exists about the position. It would also provide a sound basis for selecting new managers and for orienting and training them as they assume the role.

2. ***Careful Selection of the Most Suitable Candidates.*** At most firms, department/practice group managers have limited authority and succeed in their role largely by persuasion. The most valuable skill a department/practice group manager can possess, therefore, is the ability to persuade, cajole and otherwise nag colleagues preoccupied with client work to do the right thing. An inclination to plan and organize is also helpful, as well as any other specific skills indicated by the position description, such as budgeting, interviewing candidates, etc. Most candidates will have acquired training in many of these skills from prior service on committees or as deputy managers.

There are two types of inappropriate candidates: those who do not possess the necessary skills, and those who seek the role only for its status, having no intention of performing the work involved.

3. ***Training.*** The firm should develop a training program specifically tailored to the needs of its new department/practice group managers, building on the requirements outlined in the above position description and covering:

- working relationships with firm committees, the Managing Partner, and other relevant groups
- monitoring financial performance
- providing leadership for partners, associates, and support staff
- thinking and acting strategically as a Department/practice group manager

4. ***Succession Planning***. The firm's continuing success and profitability depend on the ability of future partners to provide the management and leadership required in today's changing legal market. The requisite skills for these activities must be developed and nurtured to assure their availability in the future. Thus, the Managing Partner, department/practice group managers, and Executive Committee should develop a

process for identifying and preparing future firm managers and leaders.

5. ***Continuing Support by the Executive Committee and Managing Partner.*** Neither the Managing Partner nor the Executive Committee alone can provide the necessary day-to-day oversight needed to ensure effective firm operations. Neither can provide the wide range of innovative and creative thought needed to maintain the health and growth of the firm's varied practices. A group of motivated and highly skilled department/practice group managers is necessary to accomplish these goals.

Once these managers have been selected, trained, and placed in their positions, the Managing Partner and Executive Committee must continue their support. This support should include setting high performance expectations for both the managers and their departments, delegating the necessary authority to carry out their responsibilities, assistance and collaboration in problem-solving, and allocating appropriate rewards for contributions to the growth of the firm. Without such support, the position of department/practice group manager will degenerate into something hard to fill and hardly worth filling.

Steve Chitwood is a university professor, lawyer, trainer, and management consultant with over 30 years of experience teaching and coaching professionals on leadership and management. He is the founder and former Director of the Center for Law Practice Strategy and Management at The George Washington University in Washington, D.C. He can be reached at (202) 994-6064 or chitwood@gwu.edu.

Gaye Mara is a former law firm professional development director, principal in the Alexandria-based consulting firm Professional Development Services, and editor of this journal.

Professional Developments

Events

Future PD-related conferences, seminars, and workshops:

Legal Profession:

❀ 6/7-8/07, Denver, CO. *The 2007 Lawyer Development Institute. Building a Winning Team: Meeting the Challenges of Lateral Integration.* National Association for Law Placement/ALI-ABA, www.nalp.org.

❀ 7/26-28/07, Boulder, CO. *PDC Summer Meeting.* Professional Development Consortium, www.pdclegal.org. (Members only)

❀ 7/28-31/07, Philadelphia, PA. *ACLEA 43rd Annual Meeting.* Association for Continuing Legal Education, www.aclea.org.

General Audience:

❀ 5/16-18/07, San Diego, CA. *The 2007 Employee Engagement & Retention Conference: Inspiring Loyalty and Commitment.* The Conference Board, www.conference-board.org/retention.htm. (Repeated 6/20-22 in New York.)

❀ 5/22-24/07, Chicago, IL. *The 2007 Annual Diversity Conferences: Rhythms of Our World: Examining and Honoring Our Uniqueness and Multiplicities.* The Conference Board, www.conference-board.org/diversity.htm.

❀ 6/3-6/07, Atlanta, GA. *ASTD 2007 International Conference & Exposition.* American Society for Training and Development, www.astd.org.

❀ 6/3-6/07, Bryn Mawr, PA. *Managing a Future Search – A Learning Workshop.* Future Search Network, www.futuresearch.net. (Repeated 8/26-29 in Stockholm.)

❀ 6/7-13/07, Phoenix, AZ. *Training Directors' Forum.* Training Magazine, www.trainingmagevents.com.

❀ 6/12-13/07, New York, NY. *Work Life 2007 Conference. How the Global Economy Is Affecting Work Life: What Work Life and HR Professionals Need to Know.* Conference Board/Families and Work Institute, www.conference-board.org/worklife.htm.

❀ 6/12-14/07, San Diego, CA. *The 2007 Leadership Development Conference: Building Organizational Capability to Execute Business Strategy.* The Conference Board/Center for Creative Leadership, www.conference-board.org/leadership.htm.

❀ 6/18-20/07, Lake Geneva, NY. *Accelerated Learning Training Methods Workshop.* The Center for Accelerated Learning, www.alcenter.com. (Repeated 7/16-18 in Denver, 8/6-8 in Toronto, 8/27-29 in Chicago, 9/17-19 in Dallas, 10/8-10 in Lake Geneva, 11/14-16 in Seattle, 12/10-12 in Phoenix.)

❀ 6/24-27/07, Phoenix, AZ. *The Leadership Summit for CEOs and CLOs.* Training Magazine, www.trainingsummit.com.

❀ 7/26-27/07, New York, NY. *The 2007 Annual Diversity Seminars. The New Diversity: Beyond Borders & Beyond Barriers.* The Conference Board, www.conference-board.org/diversityseminars.htm. (Repeated 8/16-17 in San Diego, 9/10-11 in Chicago.)

Resources

Hot off the presses:

Building Career Connections – Networking Tools for Law Students and New Lawyers, by Donna Gerson (104 pages, $17-25 depending on quantity). New from NALP, tips for beginning lawyers on how to initiate, cultivate, and maintain beneficial professional contacts. www.nalp.org.

Summer Associate Toolkit: Write Your Way to Law-Firm Success, by Ross Guberman (130 pages, $100-150 depending on quantity). This is a new publication from Guberman, of Legal Writing Pro, encapsulating the writing advice most often needed by summer associates. He is

also soliciting suggestions for topics to include in a forthcoming Associate Toolkit. www.legalwritingpro.com/toolkit/.

Studies

PD where you least expect it. Two studies recently reported in *The Atlantic*:

Video games hone surgical skills: Researchers time-tested 33 surgeons at Beth Israel Medical Center in New York on their laparoscopic skills (operating tiny surgical instruments while viewing the surgery on a TV screen). Those who had played video games for more than three hours a week averaged 64 minutes and 197 errors on the test; those who had never played averaged 87 minutes and 314 errors. Video gaming skills accounted for 31 percent of the variance in performance. ("The Impact of Video Games on Training Surgeons in the 21st Century," James C. Rosser et al., *Archives of Surgery*.)

When "learn by doing" is not an option, choose age and education: Researchers reviewed data from the Israeli Security Agency on Palestinian suicide bombing attacks in 2000-2005. On average, the 5 deadliest bombers were almost five years older, and 3 of the 5 (60%) had or were pursuing advanced degrees, compared with 17% of the sample. Younger, less-educated bombers more often lost their nerve, got caught, or detonated prematurely. ("Attack Assignments in Terror Organizations and the Productivity of Suicide Bombers," Efraim Benmelech and Claude Berrebi, National Bureau of Economic Research.)

MCLE Watch

(We thank David Carr of Reqwired, Inc. for most of the information on which this column is based.)

Mississippi has revised its ethics requirement, effective January 25, to an "Ethics/Professionalism" requirement and accordingly permits lawyers to take professionalism courses to satisfy it. www.mssc.state.ms.us/cle.

New Jersey is starting down the MCLE path. An ad hoc committee from the Supreme Court and the State Bar are meeting on May 18 to discuss possible requirements. Stay tuned…

The **North Carolina** Supreme Court has approved rules defining accreditation standards for law practice management and skills training courses. www.nccle.org.

As of January 29, **Wisconsin** will accept online, on-demand courses that repeat approved live programs for up to 10 hours of credit in a reporting period. No ethics or professional responsibility credit will be given for such courses, and they may not be used for reinstatement, readmission, or reactivation. www.wicourts.gov.

Quote of the Quarter:

"Research shows that protégés influence the amount of mentoring they receive. You're more likely to get mentored if you're talented, have an outgoing personality and are career- and goal-oriented. Once a mentor sees that you're eager, the more likely it is the mentor will want to spend the time and social capital on you, introduce you to the right people, and so on. One unfortunate consequence of this is that sometimes people who are most in need of guidance don't have mentors, which means companies must make a special effort to reach out to the people who really need mentors."

– Katherine Klein, Wharton Management Professor, in *Knowledge@Wharton*, May 16, 2007.

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