



2015 PSALA Education Summit

February 11, 2015

Welcome!

- Education Committee
- Incoming & Outgoing Section Co-Chairs
- Board:
 - Technology & Communications
 - Professional Outreach
 - Diversity & Inclusion
 - Newsletter



Agenda

- Business Plan & Education Overview
- Section Meetings & Handouts
- **Idea Exchange/Brainstorming**
 - Speakers & Education Calendar
 - Goal Setting
 - Take away: Meeting Ideas
- Technology
 - Checklist
- ALA Requirements
- Meeting Planning Tips



3

Business Plan: Leadership & Diversity

- Leadership Focus at Chapter Level
 - Shine a Light on Section Meetings
 - Business Partners, NWLIA
 - Add a Personal Touch
 - Break the Mold, keep topics current
- Diversity
 - Maintain diversity through all Chapter Activities
 - Include new members, veteran members
 - Business Partners, other Associations



4

Survey Says - Fewer Meetings!

- Four Chapter Meetings per Year
 - July 22, 2015 – **Sandra Yamante**
 - October 15, 2015 – **Bruce MacEwan & Janet Stanton**
 - January 28, 2016 – **Kristen Stark**
 - March 15, 2016 – **Dr. Bob Nelson**
- Business Skills Series for Attorneys
 - Spring 2015 –Fall 2015: 3 sessions
- BP Events, Socials, Service
- ALA & Professional Meetings
- WORK!



PSALA Calendar - DRAFT 2015-2016

April '15	May '15	June '15	Chapter Meetings	4th Thursday of July, October, January, March
July '15	August '15	September '15	Facilities	2nd Thursday of EVEN months (Over lap w/ board meetings)
October '15	November '15	December '15	Finance	1st Thursday of EVEN months
January '16	February '16	March '16	Small Firms	3rd Wednesday of EVEN months
			Technology	1st Friday of ODD months (2nd in January & July)
			Human Resources	2nd Tuesday of ODD Months
			Leadership Journal	3rd Tuesday of March, July, November (ODD)
			ALA Conferences	National Conf. in Nashville, TN Bus. of Law - West in Las Vegas
			BP Event	Networking Event April 1st
			Socials	September & December - NEED DATES
			Next Generation Leaders	NEED DATES- Quarterly
			Holidays	

Drafted 2/9/2015

PSALA Calendar (with Committee Meetings) - DRAFT
2015-2016

Month	Calendar Grid	Meeting Details
April '15		<ul style="list-style-type: none"> Chapter Meetings (Red): 4th Thursday of July, October, January, March Facilities (Green): 2nd Thursday of EVEN months (Over lap w/ board meetings) Finance (Yellow): 1st Thursday of EVEN months Small Firms (Blue): 3rd Wednesday of EVEN months Technology (Purple): 1st Friday of ODD months (2nd in January & July) Human Resources (Orange): 2nd Tuesday of ODD Months Corp./Gov./Judicial (Dark Blue): 3rd Tuesday of March, July, November (ODD) Annual Conference (Grey): National Conf. in Nashville, TN/ Bus. of Law-West in Las Vegas BP Event (Brown): Networking Event April 1st- Need additional Event Dates Socials (Light Green): September & December - NEED DATES Next Generation Leaders (Light Purple): NEED DATES- Quarterly Board Meetings (Pink): 2nd Thursday of EVERY month Professional Outreach (Light Blue): 1st Wednesday of EVERY at Perkins Coie at 12 Education Committee (Light Green): 4 Wednesday of EVERY month at 8am Community Service (Light Orange): 3rd Monday of EVERY Month BP Relations (Light Purple): 3rd Friday of EVERY month Holidays (Light Brown)
May '15		
June '15		
July '15		
August '15		
September '15		
October '15		
November '15		
December '15		
January '16		
February '16		
March '16		

Drafted 2/6/2015



Idea Exchange

DATE	Chapter Mtg.	Section Mtg. Topic IDEAS	Section Mtg. Topic IDEAS	Section Mtg. Topic IDEAS
April 2015		Facilities:	Finance:	Small Firms:
May 2015	ALA Conference	Technology:	Human Resources:	
June 2015		Facilities:	Finance:	Small Firms:
July 22, 2015	<i>Diversity & Inclusion</i> <i>Sandra Yamate</i>	Technology:	Human Resources:	Corp./Gov./Judicial
August 2015		Facilities:	Finance:	Small Firms:
September 2015	Summer Social	Technology:	Human Resources:	
October 22, 2015	<i>Law Firm Leaders</i> <i>Bruce MacEwan</i>	Facilities:	Finance:	Small Firms:
November 2015		Technology:	Human Resources:	Corp./Gov./Judicial:
December 2015	Holiday Social	Facilities:	Finance:	Small Firms:
January 28, 2016	<i>Kristen Stark</i>	Technology:	Human Resources:	
February 2016	Education Summit & BP Expo	Facilities:	Finance:	Small Firms:
March 24, 2016	<i>Generations</i> <i>Dr. Bob Nelson</i>	Technology:	Human Resources:	Corp./Gov./Judicial:

Section Meetings

- Collecting Information
- Registration and Surveys
- Analyzing Results
- Setting Goals



Section Meetings

Meeting Type

Row Labels

Ahluwalia, Neil

2014, November 20: Chapter (What Really Matters About Pay: Using compensation to drive positive results)
 2014, September 09: Section-HR (Emotional Intelligence in Reviews, Recruiting, and Conflict Resolution)
 2014, September 26: Chapter (Emotional Intelligence for Leaders)

Alskog, David

2014, October 23: MPD (Managing Partners Dinner)

Anderson, Kimberly

2014, October 23: MPD (Managing Partners Dinner)

Anderson, Susan

2014, September 26: Chapter (Emotional Intelligence for Leaders)

Anderson, Susan P.

2014, November 20: Chapter (What Really Matters About Pay: Using compensation to drive positive results)

Barnes, Jennifer

2014, September 10: Section-Technology (Technology Security Roundtable: Navigating the Minefield)

Barry, Chris

2014, October 23: MPD (Managing Partners Dinner)

Bates, Chelsea

2014, December 10: Webinar (Change Management)
 2014, November 20: Chapter (What Really Matters About Pay: Using compensation to drive positive results)



Section Survey Summary

Corporate/Government/Judicial Section

Meetings	Total Number of Attendees	Average Score
Your Internal Client	3	4
Diversity in Government Agencies	8	3.92

Ideas for future Corporate/Government/Judicial Section meetings:

- None were provided through the evaluations



Section Survey Summary

Facilities Section

Meetings	Total Number of Attendees	Average Score
Sustainability in Office Supplies	13	3.56
Shelter-in-Place -- or what to do during the zombie apocalypse	25	3.68
Ergonomic Trends	Not received	Not received
Using SaaS to Manage Office Space	Not received	Not received
Art - Best Practices	6	3.83

Ideas for future Facilities Section meetings:

None were provided through the evaluations



Human Resources Section

Meetings	Total Number of Attendees	Average Score
Delivering Difficult Messages with Tact and Leadership	28	3.53
Management the Age Gap	24	3.75
Employment Law Update	28	3.84
ALA Conference Round Table Recap	18	3.71
Emotional Intelligence in Reviews, Recruiting and Conflict Resolution	14	3.5
Law Firm Wage and Hour Issues	17	3.81
Implementation of an Electronic Performance Management System: Fostering change around managing performance	15	3.53

Ideas for future Finance Section meetings:

- Exempt vs. non-exempt; employee vs. independent contractor
- Succession Planning
- HIPAA Laws / electronic transmittal of client docs
- Employee handbooks - "put in or leave out"
- Discussion of changing performance reviews to be forward focused
- More examples on how managing performance changed other than the PM tool
- Coaching-giving feedback
- Inside-out Coaching
- Fierce Conversations
- Bias in the review process



Section Survey Summary

Small Firm Section

Meetings	Total Number of Attendees	Average Score
Strategies and Advice for Developing a Successful Marketing Plan Within Your Firm	13	3.68
Partner Succession Planning	15	3.44
Embracing Culture: Integrating lateral attorneys and staff into your firm	Not Received	Not Received
Happy Hour	Not Evaluated	Not Evaluated
EPLI, CGL, Key Person, ERISA Bond, Professional Liability, Excess & Umbrella...Where does it stop?	13	3.66
Law Firm Cash Flow	8	4

Ideas for future Small Firm Section Meetings:

- Strategies to multi-task and manage your work in a fast-paced office



Section Survey Summary

Technology Section

Meetings	Total Number of Attendees	Average Score
Social Media for Law Firms and Lawyers	18	3.83
Telecom Today, presented by Netstar, Inc.	Not Received	Not Received
Law Firm Technology: Where are we and where are we going?	15	3.46
Technology Security Roundtable: Navigating the Minefield	19	3.65
Legal Technology Reset: A Clear Path Forward	8	4.81*

* - the ILTA evaluation form was used for this event and they have a different rating scale than PSALA

Ideas for future Technology Section Meetings:

- Would like to hear more for solo & small firms
- Remote
- Email 0365
- Video conferencing, hardware refresh, mailbox size issues
- Basic overview of Technology areas for new tech managers



Section Meetings

■ Goals

- One Joint Meeting with another section
- One Business Partner panel discussion
- Host a Section Happy Hour or Morning Coffee - purely social
- Attendance by at least 2 new PSALA members
- Attendance by 4 veteran members who haven't come in a while
- Generate at least one new idea for a topic at each meeting
- **Sections generate their own goals and submit in April.**



17



Technology

Sections

- Facilities
- Finance
- Government, Corporate, Public Interest
- Human Resources
- Small Firm
- Technology



19

Checklist and timing

- Establish meeting schedule and frequency for the year during Education Summit.
- Submit new online form at least 30 days in advance of meeting:
 - Provide topic, description, location, date, time, contact person, and CLM credit.
- Information posted on PSALA website, in PSALA weekly announcements and on PSALA social media, as appropriate.
- Meeting organizers send invite and encourage attendance through section listserve.
- Registration is online. Confirmation emails go to the registrants and contact person. Meeting materials sent by George Thomas to meeting organizers the day before each meeting usually in the morning. Materials include sign-in sheet, evaluation form, name tags, and attendance spreadsheet.
- After meeting, return PDF of sign-in sheet and evaluation forms along with updated attendance spreadsheet to George Thomas.
- Draft article for Soundings or other publications.
- Forward any photos and meeting highlights to the Communication Co-Chairs.
- Send thank you to speakers.



20

Sample of New Form

Meeting Information

Contact Information

Section/Committee	<input type="text"/>
Topic	<input type="text"/>
Description	<input type="text"/>
Presenter	<input type="text"/>
Date	<input type="text"/>
Time	<input type="text"/>
Location	<input type="text"/>
Contact Person	<input type="text"/>
Contact Email	<input type="text"/>
CLM Credit	<input type="text"/>

[Continue](#)

21

Website

- Taskforce update
 - Streamlining homepage
 - Revising site map
 - Reviewing content
 - Input from Section and Committee Chairs welcomed



22



ALA requirements

ALA – requirements to keep in mind

- Sessions must be 60 minutes in length
 - Round tables and panels do not count
- President's Award of Excellence
 - Requires educational offerings in 3 of 5 areas
 - Financial Management (FM)
 - Human Resources Management (HR)
 - Legal Industry/Business Management (LI)
 - Operations Management (OM)
 - Communications/Organizational Mgmt (CM)



ALA – CLM credits

- Two broad areas around CLM credits
 - Qualification (becoming eligible to take the test)
 - Recertification



25

ALA – CLM credits: qualification

- Qualification – 5 categories
 - Writing skills
 - Communication skills
 - Self-Management skills
 - Information Technology
 - Organizational Development
- Functional specialists need additional credits in different categories



26

ALA – CLM credits: recertification

- Recertification – 7 categories
 - Financial Management (FM)
 - Human Resources Management (HR)
 - Legal Industry/Business Management (LI)
 - Operations Management (OM)
 - Communications/Organizational Mgmt (CM)
 - Substance Abuse
 - Business Ethics



27

ALA – CLM credits

- PSALA education only part of the picture
 - Conferences and webinars cover the gamut
- Resources
 - “How to Determine What Education Qualifies for CLM Credit” – ALA website
 - “Competencies by Subject Area” – ALA website
 - Speaker leads – ALA website
 - Call ALA Headquarters and ask!



28



CLE credits

CLE credits

- Two broad areas around CLE credits
 - Ethics
 - Business Skills for Attorneys
- Working to centralize chapter resource re how to apply to bar
- Handouts are a required aspect
- Unlikely to involve section presentations





If You Plan It (Well),
They Will Come

Meetings

- Plan, Plan, Plan
 - Vary: time, location, format, room set-up
- Start & end on time
 - Welcome & Business announcements
 - Business Partner & Volunteer recognition
 - Education portion (start/stop on time – always)
- Resources:
 - Board, Education Committee, PSALA Members
 - Firms, ALA Website, Professional Organizations
 - BP's, Friends, Community members





Thank You!