

2019 SUMMARY REVIEW FORM

Reviewed Attorney: _____

Lead Reviewer: _____

Identity Within Firm	<p><u>Overall Evaluation (Check One):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>
	<p><u>Issues to Discuss in Narrative Summary:</u> 1. What is this Attorney’s role within the firm? 2. To which practice group(s) does the Attorney belong? Is the group a “home”? 3. (For Senior Associates and Of Counsel – What legal issue/specialty is this Attorney “better at” than anyone else in the firm?).</p>
Workload, Productivity	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>
	<p><u>Issues to Discuss in Narrative Summary:</u> 1. Is this Attorney meeting billable hour requirements? If not, why not? 2. Do senior attorneys readily direct work to this Attorney? 3. Does this Attorney make himself/herself available for work? 4. Can this Attorney handle a large volume of work?</p>
Responsiveness	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>
	<p><u>Issues to Discuss in Narrative Summary:</u> 1. Does this Attorney perform assignments and respond to senior attorneys on time? 2. Does this Attorney expend effort appropriate to the assignment (too little, too much, just right)?</p>
Legal Skills	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>
	<p><u>Issues to Discuss in Narrative Summary:</u> 1. Has this Attorney demonstrated superior ability to recognize, comprehend and analyze legal issues, and propose reasonable and practical solutions to issues? 2. Has this Attorney demonstrated superior ability to communicate effectively (orally and in writing) regarding legal issues?</p>
Responsibility, Independence, Initiative	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>
	<p><u>Issues to Discuss in Narrative Summary:</u> 1. How much supervision of this Attorney’s work is required? 2. How independent is this Attorney? Does this Attorney demonstrate initiative? 3. Does this attorney demonstrate appropriate level of ambition?</p>
Client	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations</i> [] <i>Meets Expectations</i> [] <i>Needs Work</i> []</p>

	<p><u>Issues to Discuss in Narrative Summary:</u></p> <ol style="list-style-type: none"> 1. Does this Attorney work directly with clients? 2. Does this Attorney impress and “handle” clients, or is he/she capable of doing so? 3. Does this Attorney have primary responsibility for any clients?
<p>Integrity, Teamwork</p>	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations [] Meets Expectations [] Needs Work []</i></p>
	<p><u>Issues to Discuss in Narrative Summary:</u></p> <ol style="list-style-type: none"> 1. Does this Attorney demonstrate integrity and good judgment? 2. Does this Attorney work well with others in the firm (senior attorneys, peers, support staff)? 3. Does this Attorney take on practice development activities (articles, CLEs) and pro bono matters when appropriate?
<p>Business Plan, Growth, Strengths & Weaknesses</p>	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations [] Meets Expectations [] Needs Work []</i></p>
	<p><u>Issues to Discuss in Narrative Summary:</u></p> <ol style="list-style-type: none"> 1. Did this Attorney develop a good business plan for this year, and implement it? 2. Did this Attorney make developmental progress this year? 3. Does this Attorney have a level of skill and maturity commensurate with a typical attorney at the same level of experience? 4. What are this Attorney’s strengths and weaknesses? 5. (Senior Associates and Of Counsel Only – Does this Attorney demonstrate an aptitude for bringing new business to the firm? Does this Attorney effectively delegate work to, and supervise, younger attorneys as appropriate?).
<p>Community Involvement</p>	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations [] Meets Expectations [] Needs Work []</i></p>
	<p><u>Issues to Discuss in Narrative Summary:</u></p> <ol style="list-style-type: none"> 1. Does this Attorney involve himself/herself in professional, charitable or community activities outside of the firm? 2. Is this Attorney building skills, relationships and reputation from such activities? 3. Does this Attorney network effectively with potential clients?
<p>Potential Shareholder</p>	<p><u>Overall Evaluation (check one):</u> <i>Exceeds Expectations [] Meets Expectations [] Needs Work []</i></p>
	<p><u>Issues to Discuss in Narrative Summary:</u> Does this Attorney have potential to be a shareholder, including:</p> <ol style="list-style-type: none"> 1. Ability to achieve a high quality work product 2. Good judgment and ability to exercise it under pressure 3. Ability to assume primary responsibility for major matters for major clients 4. Ability to attract and hold clients 5. Willingness to contribute adequately in time and effort to firm administration, non-fee work and other projects 6. Good character, integrity, honesty 7. Ability to relate well to firm’s other lawyers and staff members 8. Able to supervise and lead subordinates 9. Demonstrated ability to contribute positively to the economic success of the firm, including consistent performance at or above acceptable levels of billable hours, fee revenues and realization. 10. Good reputation in the legal profession and the community.

Annual Review Comments

Prepared by:

Date: _____, 2019

Lead Reviewing Attorney

Review meeting held and evaluation discussed:

Date: _____, 2019

Reviewed Attorney