

Annual Non-Shareholder Attorneys Review Process

1. August Planning

- a. Obtain client information from Accounting as to top matters per associate and hours.
- b. Meet with each associate to confirm primary shareholder on each matter / add'l matters / major non-billable projects.
- c. Finalize **Matters Chart** (associate / matter / shareholder / hours)
- d. Create Review Teams and include Mentor on each team into **Review Team Chart**

2. September Associates Committee Meeting

- a. Confirm Matters Chart with committee:
 - i. Confirm Lead Reviewer
 - ii. Confirm team
 - iii. Address Of Counsel
- b. Confirm process (see below)
- c. HR Director to prepare links to online review by Oct. 1

3. October 1 Kick-Off

- a. Issue shareholder email with Review Team assignments, links to **online reviews**.
- b. October 15th deadline and follow-up October 20th follow-up for finals.
- c. October 20: Review Team Leaders meet and compile **Summary Review**
 - i. Review Lead can/should meet individually or as a group with each reviewer if negative review or other substantive concerns are raised.
 - ii. Summary Review to be completed by Team Leader
 - iii. Compiles comments into Narrative (form to be provided)
 - iv. Narrative is in Shareholder Annual Meeting Book and is provided to associate in Dec meetings.
 - v. Summary Review to HR Director by November 10.

4. November / December Follow-Ups

- a. Nov 10: HR Director includes Summary Reviews in Shareholder Annual Meeting Books
- b. Nov. Annual Meeting: Team Leader presents attorney's review
- c. Nov. 30: email scheduling review lunches by December
- d. Dec 10: review lunches held and Summary Reviews signed, back to HR Director