Associate Attorney Curriculum Plan
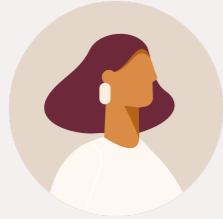
Produced by Montage Learning 2022

Summary

The ▓▓▓▓▓▓ Associate Attorney Curriculum Plan defines the learning path for new associate attorneys. The Plan identifies the user persona, steps through the learning solution and strategy, and plans the build phases of the program.

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Persona

Alex

They work remotely, individually and collaboratively on case teams with other attorneys and support staff, to perform their roles and responsibilities on cases and non-case work. Their main role is to support Responsible Attorneys with case work. They have general legal writing skills but lack knowledge around the practice of law and B&F's processes. They may have been a legal intern, clerk, or summer associate.

On a case, they may find themselves directing (or listening) interviews/investigations to clarify/define the client's circumstances, report their findings, and draft legal documents. If they don't know something, they usually ask a more senior attorney for help. They have a difficult time navigating case nuance, directives from attorneys, and juggling deadlines. They have to keep learning to maintain or excel in their role.

Goal(s)

- To improve their skills to become a better attorney
- To be a reliable member of the case team
- To be able to address their needs through training or without constant input from senior attorneys

Obstacles

- Learning on the job
- Gaining confidence in world where I don't know what I don't know
- Conflict between role/responsibility and the desire to be handheld throughout the process

Cause

- I am unsure of my responsibilities in cases
- I don't always know the right process or way of completing a task
- I find it difficult to grow as an attorney because I'm so busy

Effect

- Ability to understand the requirements of the position
- Ability to produce deliverables
- Ability to address/ask questions when needed

Reflection

What feels real about this persona? How so? Why?

- Conflict to be better attorney
- They dont know what they dont know
- Feel and lack of confidence
- What they are trusted with to develop their skills during case work

What would you add or change?

- conflict between role tasks and entitlement (desire to be handheld and spoon fed but always want more responsibility)

How might this differ compared to...?

- ability to raise problem with leadership and drill down to root
- recognizes importance of non-urgent case related forward thinking tasks - doing more than the minimum) tasks - significantly increases value of case
- tenured associate not afraid to ask for help or figure it out
- thinking more strategically about advancing cases
- offensive vs defensive
- what 3rd yr associates should be capable of
- understanding the minimum leads to losses
- noticing difference in workplace
- understanding of different workplaces - appreciate the differences
- understanding of difficulties and ability to address

Solution Overview

Associate Attorney Curriculum

Summary The Associate Attorney Curriculum addresses the initial questions of a first year associate by providing on-the-job access to content and training for their main responsibilities, and builds their legal expertise into their second and third years in practice.

Goal

The goal of the Associate Attorney Curriculum is to provide a platform for new attorneys to build their legal skills through training, on-the-job learning, and instilling confidence in their knowledge.

Creation of Knowledge Base

Summary A knowledge base is the life of B&F and provides access to firm, role, and industry knowledge/content like responsibilities, processes, best practices, templates.

Goal

The knowledge base is a library of material that is routinely used by everybody at the firm.

What are the filing rules for the Middle District of Georgia? Find out in the knowledge base.

Creation of Training Solutions

Summary Training solutions are opportunities where AA can practice what they know, how to do a process, like filling out EEOC template or how to conduct a deposition.

Goal

Training solutions improve the overall skills, knowledge, and how to of attorneys.

I've never interviewed a witness. Complete the Interview Witness training to be more prepared for your first interview.

Evaluate

Summary A knowledge base and training solutions are only as valuable as they are relevant. Providing a way for AA to self-assess, and for manager/mentors to assess AA work/progress enables the assessment of the content's effectiveness.

Goal

A knowledge base and training solutions breath life into an organization. Ensure the health of B&F by continuously evaluating and updating content.

Let's score myself on how I did on completing the EEOC template.

Solution Map

Solution Alignment

Summary Here outlines examples of how the curriculum topics are structured. AA Actions grouped by Case Timeline Topics, in sequence, are on the left (top to bottom) while Knowledge Base, Training Solutions, and Evaluate align from left to right with each AA Action.

Example
- *Alex can find information about EOCC Charge in the Knowledge Base to help establish understanding of the material.*
- *And as the Training Solution they are able to follow along with a "how-to" in filling out a template.*
- *After submitting the filled out EOCC template, Alex can self-assess while her manager can review and grade, both using the same rubric.*

Roles and Responsibilities	**Knowledge Base** BF Associate Attorney Case Responsibilities	**Training Solutions** Matter Gantt Access, Review, Update	**Evaluate** Have first year associate responsibilities changed? Has Matter Gantt process been updated?
Attorney Best Practices	**Knowledge Base** How to Handle Mistakes	**Training Solutions** Soft skills	**Evaluate** Update best practices
Client Meeting Prep	**Knowledge Base** Client Meeting Overview, Typical Questions	**Training Solutions** Review client intake, Prepare questions for RA Witness Interview	**Evaluate** Update best practices
Draft EEOC Charge	**Knowledge Base** Link to template, Best Practices	**Training Solutions** How to fill out template	**Evaluate** Common mistakes
Draft Complaint	**Knowledge Base** Best Practices, Court Requirements	**Training Solutions** Drafting legal documents - the well-pleaded complaint	**Evaluate** Update best practices, templatize
Prepare Client for Deposition	**Knowledge Base** Preparing Client for Deposition Best Practices	**Training Solutions** Role play, Draft Preparation Standards	**Evaluate** Create client preparation standards
Calculate Damages	**Knowledge Base** Damages checklist	**Training Solutions** Calculate back pay	**Evaluate** Update Checklist
Collect Documents from Client	**Knowledge Base** Document Checklist	**Training Solutions** None	**Evaluate** Update checklist

Components

Knowledge Base

Definition The knowledge base is the expert. The knowledge base categorizes articles, best practices, processes, etc into easy to find resources. The knowledge base helps your attorneys to find answers on their own.

Format

Utilize the case timeline to format the resource categories.

- Initial Investigation
- Prepare for litigation
- Pre-Discovery
- Discovery

When

The knowledge base will be used on a daily bases by all employees. Once attorney grasp their responsibilities (no longer need training), they will likely live in the knowledge base to pull and review information.

Recommendations

The knowledge base lives in Appinium. The structure should follow the case timeline:

Legal Practice
- Associate Attorney Introduction
  - Roles & Responsibilities
  - Best Practices
  - Courts
- Case Timeline
  - Initial Investigation
  - Prepare for Litigation
  - Pre-Discovery
  - Discovery
  - Summary Judgement
  - Trial Prep
  - Trial
  - Settle
  - Withdraw

Impact

Knowledge base enables efficiencies. Resources are categorized and centrally located for all firm members to use and evaluate.

Examples

- Templates
- Best Practices
- Checklists
- Processes
- Articles
- Court information
- Background information

Components

Training Solution

Definition Training solutions are where Alex can learn about their new profession, practice the skills and behaviors required of attorneys, and begin to grow in their new role. The knowledge base is the information about a topic, training solutions develop the skills to perform the tasks related to that topic.

Format

Utilize the case timeline to format the resource categories.
- Initial Investigation
- Prepare for litigation
- Pre-Discovery
- Discovery

Impact

Training solutions improve the learners understanding of the practice of law and the overall skills and behaviors needed to practice law.

When

Training solutions will be used when an associate attorney is unsure how to complete a task or responsibility. Training solutions can be accessed and reviewed the moment the attorney recognizes the need.

Examples

- Walkthroughs
- Scenarios
- Role plays
- Activities
- Videos
- Use cases
- Short sims

Recommendations

The training solutions live in Appinium alongside the Knowledge Base. The topic structure layout can look something like this:

- Case Timeline:
  - Initial Investigation
- Topic:
  - EEOC Charge
- Knowledge Base:
  - EEOC Charge Template
  - Best Practices
- Training Solution:
  - How to fill out EEOC template
  - Example
- Evaluation:
  - Content Survey
  - Rubric

Components

Evaluation

Definition Evaluation is a necessary component to the Associate Attorney Curriculum plan and consists of two components. We recommend using a rubric that assesses the actions taken by an AA, deliverables that an AA produces, and any other behavior that may be a benchmark. The rubric evaluation allows AAs to self-assess and track progress, while enabling their managers/seniors to do the same of their performance. Sharing the same rubric means they are speaking the same language. Synthesizing the results of rubric scores across AAs also allows the us to assess the effectiveness of the content – helping to locate areas of improvement.

A standard Learning Experience Survey (LES) is always provided and required by learners to fill out after completing different sections in the LMS.

Format

Content Evaluation Per Topic
- Standard LES
- SME Review

Learner Evaluation
- Rubric
- Manager/Senior/Mentor

When

Content can be evaluated at any moment by any user. SMEs can review content and user surveys on a schedule. Learner evaluations should occur on a scheduled basis and/or when a deliverable is submitted.

Impact

Evaluation keeps content fresh and relevant. It also allows Alex to understand where they are excelling and where they need additional focus.

Examples

- Standard LES
  - *From a scale of 1-5, This content was relevant to my role...*
- Scheduled SME Reviews on a cadence
- Rubric (Included in this document)

Recommendations

Content Evaluations in the form of LES can be posted on each topic. On a quarterly or semi-annually basis, SMEs should review user surveys and content. Content should be updated based on needs, relevance, and thoroughness.

Learner Evaluations, via Rubrics, for first year associates, should occur more frequently. Building good habits and understanding of the practice of law in associates is key to building good attorneys. Associate deliverables should be evaluated often to give insight into where the associate is performing/underperforming.

Evaluation Example

Rubric

Summary Assessment is key to growth. During evaluation, Alex can self assess using this rubric. The RA or mentor can use the same rubric to asses Alex's performance. And the firm can asses the resources available to the learner based on performance.

Know Does Alex understand the task, its process, and if they can explain it?

Do Can Alex use their understanding of the task to actually perform it, successfully, without guidance or error?

Goal

Rubric is designed to be used by multiple parties to assess individual learner performance as well as the curriculum efficiency.

Knowledge Topic	Associate Task	Emerging (1)	Developing (2)	Proficient (3)	Advanced (4)	Expert (5)	Score	Notes
Identified Knowledge Topic: Initial Investigation	**Identified Task:** Draft EEOC Charge	**Know** AA does not understand what the task is and its process	**Know** AA understands what the task is but does not understand the process	**Know** AA understands what the task is and its process	**Know** AA understands what the task is, why it is important and its process	**Know** AA understands what the task is, why it is important, its process, and can teach others	**Scoring:** 3	Great job! Just pay close attention to the best practices. **Know**: Alex was able to talk about the task knowledgeably and also was able to describe the process that needs to be followed. **Do**: Alex was able to draft the EEOC, but needed to ask RA for advice on section and to review their work.
		Do AA requires guidance and help in completing task	**Do** AA requires guidance in completing task	**Do** AA is proficient in completing task with minimal supports, but some errors occur	**Do** AA can complete task on their own with few errors	**Do** AA can successfully complete task with no errors		

Curriculum Overview

	Knowledge Base	Training Solution	Kbase/Training
Associate Attorney	**Topic:** Roles and Responsibilities	**Topic:** Litigation Process	**Topic:** Attorney Best Practices
Initial Investigation	**Topic**: Prepare for Client Meeting	**Topic**: Review Client Meeting	**Topic**: Draft EEOC Charge
Pre-Discovery	**Topic**: Prepare Discovery Requests	**Topic**: Manage/Attend Hearings	**Topic**: Draft 30b6 Notice
Discovery	**Topic**: review/Evaluate Evidence	**Topic**: Take and Defend Depositions	**Topic**: Prepare Client for Deposition
Trial Prep	**Topic**: Trial and Arbitration Prep	**Topic**: Prepare Client and Witnesses	**Topic**: Prepare Trial Notebooks
Trial	**Topic**: Witness Preparation	**Topic**: Draft Opening Statement	**Topic**: Draft Pretrial Orders
Settle	**Topic**: review/Update Settlement Agreement	**Topic**: Draft Mediation Statement	**Topic**: Participate in Negotiations
Withdraw	**Topic**: Withdraw Rules	**Topic**: Document Client Issues	**Topic**: Ensure Privilege

Curriculum Example

Summary The curriculum structure should follow the case timeline. This allows for easy categorization of content and structure in Appinium.

The Case Timeline Topics flow from top to bottom in sequence, extending from each are example topics and how they might be broken down as content between the Knowledge Base and Training Solutions.

Example Task

Draft EEOC

Alex is assigned to draft the EEOC charge draft for the case. Alex has never drafted an EEOC Charge before. Alex searches Appinium to review information on EEOC Charge.

Moments for Growth

- Evaluate
- Reflection
- Peer Support

Knowledge Base

Alex reviews the knowledge base for information on EEOC charges and positions statement. They also review EEOC best practices. A link to the EEOC template is provided.

Training/Practice

Alex watches the training video on how to draft an EEOC charge. Alex uses the template to start on drafting using the how-to provided by the video.

Deliverable

Alex delivers the draft to the RA. The RA reviews and provides Alex with comments to pay special attention to specific case details. Alex edits EEOC charge and resubmits.

Evaluate

Alex requests the RA to evaluate their performance on the task using the rubric. Alex also self-assesses using the rubric. This creates a more focused, richer discussion about EEOC charges. Alex makes an appointment to speak with their manager/senior/mentor about the evaluation and ways to improve.

Technical Overview

Using Curriculum Plan to Pull Content

1 — Use the Associate Curriculum Plan - Tab Phase 1 to pull content for Appinium: **A.** Case Timeline, **B.** Topic, and **C.** Content resource

	Case Timeline	Topic	Objective(s)	Resource Type	Implementation	Content	Content Location
1							
20	Initial Investigation	Draft EEOC Charge	1. Follow EEOC template section by section 2. Identify all claims and facts needed to bring EEOC charge 3. Understand the difference between needed and unnessacry facts 4. Ensure information is correct	Knowledge Base		1. EEOC Charges and Position Statement	Shared Drive
21				Training		2. How to Fill out an EEOC Charge	Shared Drive
22				Training		3. How to create an EEOC Charge	Worldox (BF Manual)
23				Knowledge Base		4. Create EEOC Charge	Spekit

2 — Verify content is relevant for Associate Attorney

3 — 1. Create new Object on Appinium *"AA Curriculum - Initial Investigation - Filing out EEOC"*, 2. Add *"How to fill out EEOC Charge"* content to Object, 3. Add new Object to Plan *"AA Curriculum - Initial Investigation"*

How it works in Appinium

1 — Create Trac (AA Curriculum)
Associate Attorney Curriculum

2 — Create Plan (based on Case Timeline Topics)
AA - Curriculum - Initial Investigation

3 — Create Objects (based on Curriculum Plan Topics)
AA - Curriculum - Initial Investigation - How to Fill Out EEOC

1 — Learning Tracs
Recently Viewed
1 item • Updated a few seconds ago

Learning Trac Name
1 — Associate Attorney Curriculum

2 — Learning Plans
Recently Viewed
5 items • Updated a minute ago

Learning Plan Name
1 — AA - Curriculum - Initial Investigation

3 — Learning Objects
Recently Viewed
29 items • Updated a few seconds ago

Learning Name
1 — AA - Curriculum - Initial Investigation - EEOC

Program Strategy

On-the-Go Learning

Summary A On-the-Go learning strategy incorporates the concept that for Alex learning is a continuous process and requires certain opportunities to learn on their own time but also receive guidance from the experts.

On-the-Go AKA In-the-flow-of-work

Goal

Provide access to information in the time of need (knowledge base) while giving opportunities to practice and make mistakes (training solutions).

Understand What It Is

Summary Review the knowledge base to understand an AA's responsibilities, actions, and overview of concepts.

Train and Deliver

Summary An Associate can access, review, try the task and learn from their mistakes, then ask questions from the RA. Giving time back to RAs and experts, but open when critically needed.

Evaluate

Summary Did the Associate understand the concept, task, and its importance? Did they try the task before asking for help? Are the resources provided effective?

Ask Yourself

- What is required of me?
- What is the task?
- What information from the knowledge base can help me prepare?

Ask Yourself

- Am I confident in completing this task?
- Should I ask for feedback from RA?
- What questions should I ask the RA?

Ask Yourself

- How can I improve on this task?
- RA: How can the AA improve on this task?
- What other resources would help make this task easier?

Example

I was assigned to Draft 30(b)(6) Notice. Let me check the knowledge base to learn what this is and what resources are available.

Example

I found a template and how-to instructions a 30(b)(6) Notice. Let me try completing on my own and have my RA review.

Example

I submitted my draft to my RA. The RA gave me feedback and asked me to make edits. I'm not 100% sure of my errors but I review the kbase again and ask some follow questions.

Build Overview

Build Phases

Summary Based on the identification of AA responsibilities and mistakes during Journey Mapping aligned with the audit of B&F content, Montage recommends the Associate Attorney Curriculum Plan to be built in 3 phases.

Goal

Establish a training framework to ramp up AA during their early tenure at B&F.

30 Days

Phase 1

Goal Build initial curriculum strucutre and content for Associate Attorney Curriculum.

Basic How-to Montage will develop the curriculum structure in Appinium, transfer available materials into Appinium format and structure, and develop a strategy to address content gaps.

Includes these topics/components
- Appinium Curriculum Structure
- Current Available Content
- Communications
- Content Gap Plan

B&F Resources: 10 SME Hours

90-120 Days

Phase 2

Goal Develop content that addresses gaps identified in the Associate Attorney Curriculum.

Basic How-to Montage and B&F will use the Content Gap Plan to further develop the AA Curriculum. Montage will translate content for Appinium and publish. Gap development may or may not include 2/3 year AA materials.

Includes these topics/components
- Content Gap Plan

B&F Resources: 30 SME Hours

60 Days

Phase 3

Goal Optimize the efficiency of the learning content in the AA Curriculum.

Basic How-to Montage will review feedback about current content available in Appinium and create a strategy to further enhance how the content works in Appinium using learning best practices.

Includes these topics/components
- Optimization Strategy Plan

B&F Resources: 20 SME Hours

Phase Overview

Phase 1

Goal Build initial curriculum strucutre and content for Associate Attorney Curriculum.

Basic How-to Montage will develop the curriculum structure in Appinium, transfer available materials into Appinium format and structure, and develop a strategy to address content gaps.

Includes these topics/components
- Appinium Curriculum Structure
- Current Available Content
- Communications
- Content Gap Plan

Priority

Item 1 (Appinium Curriculum Structure) Build curriculum skeleton in Appinium

Item 2 (Current Available Content) Translate current content to Appinium format

Item 3 (Current Available Content) Stage and publish translated content in Appinium

Item 4 Design communications that update AA about learning content "coming soon"

Item 5 (Content Gap Plan) Collaborate on a strategy that address the identified content gaps and how/who will develop content

Start
September

End
Early October

Item 1

Item 2

Item 3

Item 4

Item 5

Item 5 can run parallel to other items

Notes

Current topics with available content: Role and Responsibilities/ Litigation Process, Best Practices, Initial Investigation, Pre-Discovery, Discovery, Trial Prep/Trial, Settle

*As content is translated and transferred into Appinium, B&F will have to determine how they will deprecate content used from other platforms (Worldox, Spekit, Stream)

Phase Overview

Phase 2

Goal Develop content that addresses gaps identified in the Associate Attorney Curriculum.

Basic How-to Montage and B&F will use the Content Gap Plan to further develop the AA Curriculum. Montage will translate content for Appinium and publish. Gap development may or may not include 2/3 year AA materials.

Includes these topics/components
- Content Gap Plan
- Communications

Priority

Item 1 (Content Gap Plan) Assign roles and responsibilities per content

Item 2 (Content Gap Plan) Execute content development plan

Item 3 (Content Gap Plan) Montage will help translate and publish to Appinium

Item 4 (Communications) Develop communications to be sent to AA when new content is available

Start October

End Late December 2022 / Early January 2023

Item 1

Item 2

Item 3

Item 4

Notes

Content identified with gaps: Mentor Program, Courts and Requirements, Employee Rights Background Info, Prepare for Litigation, Discovery, Summary Judgment, Withdraw

2nd and 3rd AA/RA content may be addressed during this phase if capacity allows, this will be determined during Phase 1 - Content Gap Plan, otherwise this may be addressed in another phase of development.

If Optimization Strategy Plan (Phase 3) is ready, we will use the resulting format and development strategy identified in order to require less redevelopment and restructuring during/post Phase 2.

Phase Overview

Phase 3

Goal Optimize the efficiency of the learning content in the AA Curriculum.

Basic How-to Montage will review feedback about current content available in Appinium and create a strategy to further enhance how the content works in Appinium using learning best practices.

Includes these topics/components
- Optimization Strategy Plan
- Rubric Development

Priority

Item 1 (Optimization Strategy Plan) Review and synthesize content feedback from Phases 1 & 2

Item 2 (Optimization Strategy Plan) Develop a plan that enhances content for learning and in-the-flow-of-work learning (e.g. bitesized learning, short simulations)

Item 3 (Optimization Strategy Plan) Enact optimization strategy on content from Phases 1 & 2 in per topic approach for redevelopment

Item 4 (Rubric Development) Outline and develop the topics, actions, and scale to use for the rubric

Start Mid-October

End Early December

Item 1

Item 2

Item 3

Item 4

Notes

This phase is meant to run parallel during Phase 2 - after having Phase 1 content live for learners, collect and review their feedback in order to create the optimization strategy and possibly prototype a solution before enacting.

Phase Timeline

September	October	November	December	January

Phase 1

Phase 2

Phase 3

Next Steps

Do Now

Summary Here are our recommended (ordered and summarized) next steps based on our detailed build phases in order to build out your AA Curriculum.

Goal

Create a curriculum framework that B&F can easily develop and maintain.

1   Build AA curriculum skeleton in Appinium

2   Translate and transfer available and aligned content into Appinium

3   Communicate with learners (AA) about content "coming soon"

4   Design a strategy to address content gaps and develop content as needed

5   Continue to develop gap content and publish

6   Review feedback about live content, incorporate and optimize based on learning best practices