



2017 ANNUAL REPORT

Professional Development & Inclusion

Ogletree
Deakins



contents

Executive Summary | 3

Professional Development: Profile, Programs, and Initiatives | 4

Diversity and Inclusion: Profile, Programs, and Initiatives | 10

Professional Development and Inclusion Publications | 18

Conclusion | 19



executive summary



The 2017 Report of the Professional Development and Inclusion (PDI) department highlights the accomplishments of the department and how these accomplishments have been made possible by a hardworking, visionary team with the support of the firm's leadership and administrative departments. This was the last year of our second three-year PDI Strategic Plan, and the 2017 goals of the PDI department have been exceeded within budget.

In 2017, the PDI department continued to support the firm's Strategic Plan and Client Pledge. The areas of quality and culture were our focus this year. By ensuring that our attorneys had access to quality developmental and advancement opportunities, we fostered consistency of quality across our 52 offices and provided the firm with the best return on its investment.

The firm solidified its place as a leader in both the professional development and the diversity arenas. Having sponsored a multitude of national and local events, we favorably impacted the communities around us and saw our visibility in those communities increase. We also actively supported our shareholders in reaching out to their clients and participated in multiple client meetings and discussions, all of them with positive results. Additionally, as PDI Director, I participated in a number of local, regional, and national speaking engagements representing the firm.

Our professional development efforts focused on driving the use of ODPro (our labor and employment benchmarks) and ODPro Immigration. We worked diligently with practice group leaders and subject matter experts to create ODPro benchmarks for additional specific practice areas (namely Employee Benefits-Compliance, ERISA Litigation, and Class Action); to further ensure consistency of quality and service across offices. We continued to drive use of the Success the OD Way (SODW) Learning

Guide, which, when used in conjunction with ODPro, provides supervising attorneys the opportunity to speak about specific behaviors they want to reinforce or course-correct. This allows attorneys—especially associates—to take greater ownership of their careers by proactively charting the course of their advancement within the firm, thereby also increasing retention. In that regard, we worked collaboratively and proactively with five other firm departments (Knowledge Management, Client Services, Learning and Employee Development, Litigation Support, and Legal Project Management) on both ODPro and SODW to harness their resources and talent in both initiatives.

Our other professional development initiatives ranged from an advanced legal writing and editing seminar and a client development program for junior associates to a business growth program for top-performing nonequity shareholders. We continued to expand the availability of business development and professional skills training to all attorneys through a cost-effective subscription to Lawcountability, multiple new business development webinars, and an e-learning initiative on key topics (e.g., conducting effective performance evaluations, networking, delegating effectively, working with multiple supervisors, and mentoring effectively). Our Leadership Development Program continued to support selected top-performing associates to advance to shareholder. Finally, the PDI senior leadership team provided individual coaching as well to address the specific professional development needs of associates, of counsel, and shareholders.

Our diversity and inclusion efforts included, but were not limited to, providing firm-wide cultural competency training for attorneys and staff by incorporating it into their onboarding and formal learning paths, professional development support for the firm's diverse lawyers, and active support of the firm's six Business Resources Groups—ODAlliance (supporting LGBT attorneys),

ODA3 (the Asian business resource group), ODAdeleante (the Hispanic/Latino business resource group), ODFamily (supporting parents and families), ODWIN (our women's initiative), and ODBAR (the African-American business resource group). We supported the firm's efforts to launch a new Women's Task Force with several initiatives impacting the retention, development, and advancement of our women lawyers. Furthermore, we also cultivated relationships with numerous diverse organizations, completed 28 diversity and inclusion surveys, responded to over 25 client requests for proposals requiring diversity metrics and/or initiatives, and won diversity and inclusion awards/recognition for our efforts, including receiving a perfect score on the Human Rights Campaign's Corporate Equality Index, being named a Gold Standard Firm by the Women in Law Empowerment Forum, ranking fifteenth out of the top 25 firms for diversity on the Vault Associate Satisfaction Survey, and winning the Riley Institute's Upstate Diversity Leadership Award.

Overall, 2017 was a standout year for the firm's Professional Development and Inclusion department. The department embodied the firm's Client Pledge by ensuring attorneys had access to quality developmental opportunities across offices, fostering an inclusive culture reflecting the firm's core values of mutual respect and teamwork, supporting the firm's diversity recruiting efforts, collaborating strategically with other administrative departments, and developing specific initiatives to support all attorneys. We look forward to completing a needs assessment in 2018 and working on a new three-year strategic plan throughout this next year.

Warm regards,
Michelle Wimes
Chief Diversity and Professional
Development Officer

2017 professional development:

PROFILE, PROGRAMS, AND INITIATIVES



PDSC Members in 2017

Professional Development Steering Committee

The Professional Development Steering Committee (PDSC) acts as an advisory body to the PDI department and its members offer their expertise as reviewers, content developers, presenters, and panelists for internal trainings. In 2017, PDI and the PDSC further refined their roles and responsibilities and modified members' term limits to ensure historical continuity as well as new leadership opportunities. Joseph L. Beachboard (Managing Director, Torrance); Benjamin R. Holland (Shareholder, Charlotte); Sharon P. Margello (Shareholder, Morristown); and Charles T. (Ted) Speth II (Shareholder, Columbia) are rotating off the PDSC in January 2018. Katessa Charles Davis (Shareholder, Los Angeles); Tobias E. Schlueter (Shareholder, Chicago); and Gillian P. Yee (Shareholder, Detroit Metro) are rotating on the committee.



PD Ambassadors in 2017

Professional Development Ambassadors

Professional Development Ambassadors represent the PDI department and the PDSC in each office and champion local professional development (PD) initiatives.

Throughout 2017, the ambassadors liaised with—and received guidance and support from—their PDSC liaison for the office to support national PD initiatives and to identify local development needs and resources.

Professional Development Initiatives

Ogletree Deakins defines professional development as the ongoing process of expanding knowledge and refining current skills or acquiring new skills through access to formal and informal training opportunities for all attorneys. It is a mission-critical endeavor the firm undertakes systematically to strengthen its position as the premier labor and employment firm in the United States and beyond.

In 2017, our professional development efforts helped ensure all attorneys had access to top-quality legal, leadership, professional skills, and business development training. We drew on existing firm resources as well as outside consultants.

Our PD initiatives and programs engaged attorneys in a variety of distinct learning modalities (visual, auditory, and kinesthetic) in different environments (virtual, face-to-face) across a broad range of substantive legal topics and professional skills. Initiatives and programs seamlessly incorporated inclusion as an essential skill that is integral to each attorney's professional development and his or her ability to provide the best service for our clients in a dynamic legal marketplace.

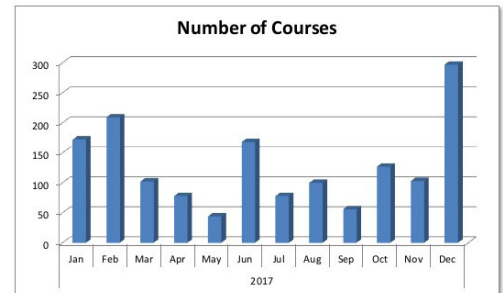
Throughout the year, we remained committed to ensuring that all attorneys, and especially associates, had the opportunity to develop the commercially viable skills that lead to success and, most importantly, directly benefit Ogletree Deakins' clients and the firm as a whole.

Firm-Wide Professional Development Programs and Initiatives

Substantive Legal Training and CLE

Ogletree Deakins is enrolled in a subscription with West LegalEdcenter, a web-based Continuing Legal Education (CLE) and professional development service from Thomson Reuters that provides comprehensive, relevant

continuing legal education. This service provides consolidated, firm-wide access to CLE training for all our attorneys and paralegals.



In 2017, our attorneys expressed great satisfaction with the service and used it more than ever. Our attorneys and paralegals accessed a total of 1,534 programs; 1,365 were on-demand, and 169 were live webcasts as of December 31, 2017.



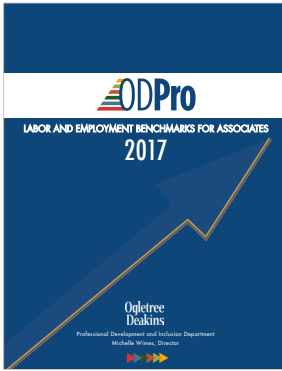
Thomas B. Song (Associate, Orange County)

"It's the easiest way to quickly grab MCLE when you're in a busy practice. I can even listen to them on the app during my commute."

– Thomas B. Song (Associate, Orange County).

Additionally, the firm renewed its firm-wide subscription with the American Bar Association (ABA) which allowed our attorneys to participate in the ABA Free CLE Series and earn up to 18 hours of free CLE every year.



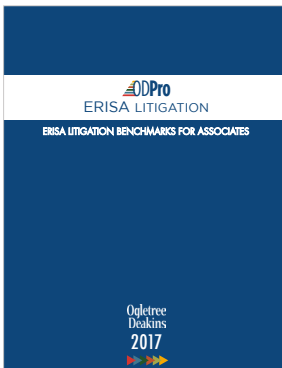
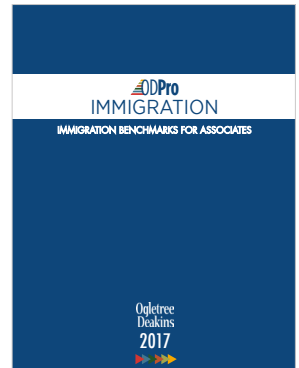


Labor and Employment Benchmarks

ODPro is an inventory of benchmarks that PDI and the PDSC have determined associates should meet to progress and succeed within the labor and employment practice. The benchmarks are designed to help associates, practice area leaders, and the PDI department assess associate progress. They were updated in 2017, with information provided to us by six administrative departments, Knowledge Management, Learning and Employee Development, Legal Project Management, Litigation, the General Counsel's office, and Client Services. PDI took steps to ensure ODPro was being used effectively across all office locations and has met with associates and Office Managing Shareholders to track progress.

Immigration Benchmarks

PDI continued to support the leaders of the Immigration Practice Group to drive use of ODPro Immigration. At the Immigration Practice Group meeting during the 2017 Attorney Retreat, Laura Rogora (PD Manager), together with Jacquelyn P. Maroney (Shareholder, Austin) and Andrew W. Merrills (Shareholder, Raleigh, and Immigration Practice Group Leader) relaunched ODPro Immigration to ensure consistent and effective benchmarking. This included a comprehensive 2018 Drive-Use-of-ODPro Plan, championed by Jacky Maroney, which includes group calls, individual meetings, etc. PDI is currently working with Stephen H. Smalley (Shareholder, Raleigh) and KM Research to create a PD onboarding plan that ensures newly-hired immigration associates are trained in the fundamentals of immigration law as practiced at the firm.

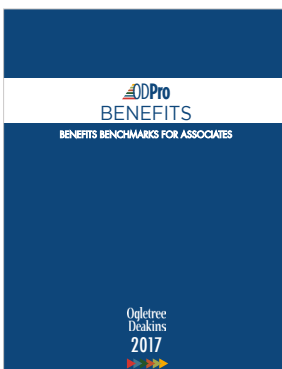
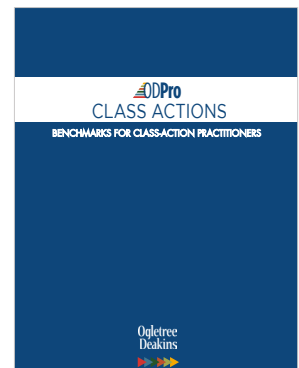


ERISA Litigation Benchmarks

PDI continued to work with Mark E. Schmidtke and Eric P. Mathisen (Shareholders, Chicago) to create ODPro ERISA Litigation benchmarks and finalized the junior and mid-level benchmarks.

Class Action Benchmarks

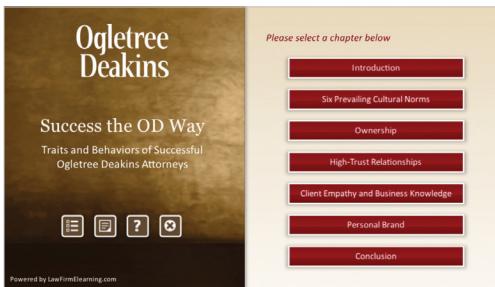
Laura Rogora (PD Manager) and Patrick F. Hulla (Shareholder, Kansas City) presented a draft of ODPro Class Actions during the Class Action Practice Group meeting at the Attorney Retreat. The draft is undergoing one last round of review by class action experts and will be final by the end of the first quarter of 2018.



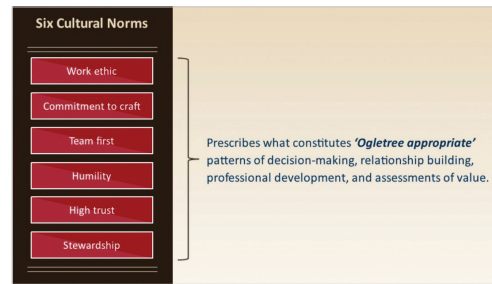
Employee Benefits Benchmarks

Joel A. Daniel (Shareholder, Greenville, and Employee Benefits Practice Group Leader) finalized ODPro Benefits Compliance benchmarks.

Success the OD Way Learning Guide: Making What It Takes to Be Successful More Transparent



PDI continued to drive use of the **Success the OD Way (SODW) Learning Guide**, which articulates the firm’s cultural norms and the behaviors and traits that lead to success.



PDI created an **onboarding SODW e-learning module** for newly hired Ogletree Deakins attorneys at all levels. This will be included in the mandatory learning path of every attorney as part of the onboarding process.

Writing Better Legal Memos



This one-day program brought together 65 first through fourth year associates to hone their legal writing skills under the guidance of internationally renowned lexicographer and teacher, Bryan Garner.

In consultation with the PDSC, the PDI department has established a three-year cycle of topics for this workshop to be held once a year as follows:

- In 2017, “The Garner Method for Better Legal Memos” was offered.
- In 2018, “The Winning Brief” will be offered.
- In 2019, “Advanced Legal Writing and Editing” will be offered.

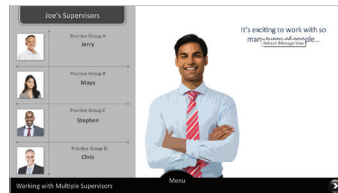
Since 2013, Ogletree Deakins has offered a legal writing workshop presented by Garner to over 300 of our associates. This seminar was—and will continue to be—a key element of the firm’s overall plan to strengthen associates writing skills.



Professional Communication and Organizational Skills

In 2017, attorneys had the opportunity to participate, individually or in a group, in tailor-made, on-demand webinars or e-learning modules that teach or enhance important professional skills that contribute to the consistency of quality client service delivery across the firm.

Making the Most of Working with Multiple Supervisors: This e-learning module is geared to all attorneys that work with several supervisors. It teaches practical tips on how to learn their preferences and styles.



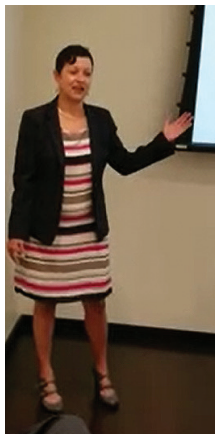
The Mentee Playbook: How to Make the Most of Your Mentoring Relationships: This e-learning module complements each office's current formal or informal mentoring program.

The Mentor Playbook: Getting Started as a Mentor: This is the companion webinar to "The Mentee Playbook."

Delegating Effectively: Delegate More, Achieve More (Level 2): This e-learning module offers brief yet substantive advice on how to delegate and supervise effectively.

Five Steps to Writing a Performance Evaluation: In this e-learning module, supervisors learn five helpful tips to assess associate performance.

The full-scale rollout of the **Public Speaking Workshop (PSW)** was a great success, with workshops taking place in eight Ogletree Deakins offices. In this interactive workshop, participants were filmed as they gave previously prepared talks and then had the opportunity to review their performances with constructive feedback from their colleagues and the facilitator, Laura Rogora (PD Manager).




Alexis Martin (Associate, Detroit (Metro))




John P. Bramble (Associate, Houston)

Business Development Skills – Blended Learning

- 

This year, PDI opened up the **Client Development Program (CDP)** to 50 associates. The CDP presents the foundational client development skills and habits that associates should acquire to strategically plan and gradually begin to execute their business development plans. The format included three live webcasts with consultant Brianna Leung.
- Fourteen top-performing associates were invited to participate in the 2017 **Client Development Plus Program (CDP+)**, which offered them support in their real-time business development efforts and also enabled them to peer-coach one another. The program format included three web-based sessions and one in-person meeting at the Attorney Retreat, with Brianna.

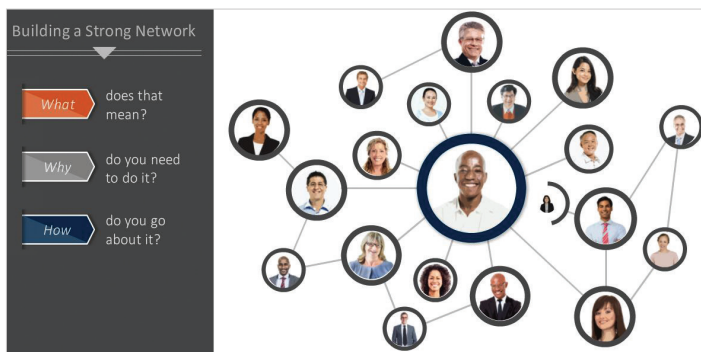

- Business Growth Program.** Designed for nonequity shareholders, this program focused on discovering and leveraging business development synergies among the 10 participants. The program included group calls as well as individual coaching.
- In 2017, PDI introduced **Lawcountability**, a weekly 10-minute webinar (also available on demand) that sets a series of tasks and reminders for business development. Six attorneys also had access to coaching with Ari Kaplan, Principal of Ari Kaplan and Advisors and creator of Lawcountability.



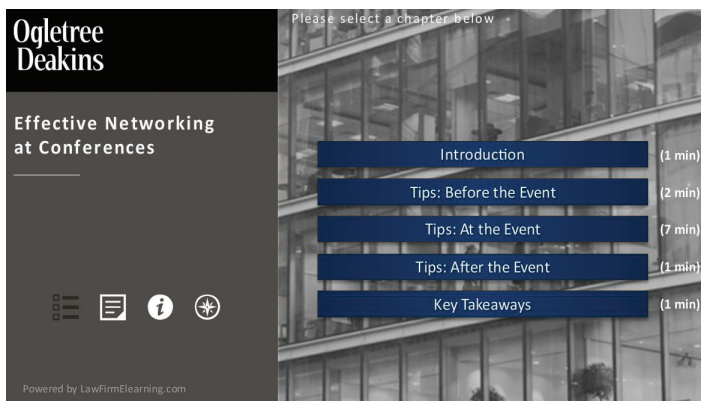
New E-Learning Modules for 2017

Adopting a Client Service Mindset: This e-learning module offers an overview of what a client service mindset is and how to develop one.

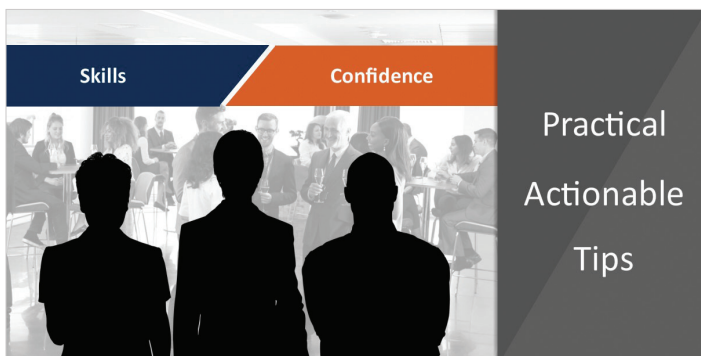
Networking 101 (Part 1): The Power of Networking: This e-learning module explains what networking is (and what it is not), what a strong network looks like, and how to begin building one early in your career.



Networking 101 (Part 2): Practical Tips for Networking Success: This e-learning module offers 10 practical tips for networking success, including what you can do during firm events.



Effective Networking at Conferences: This e-learning module offers practical tips for networking success at conferences, including tips for before, during, and after the event.



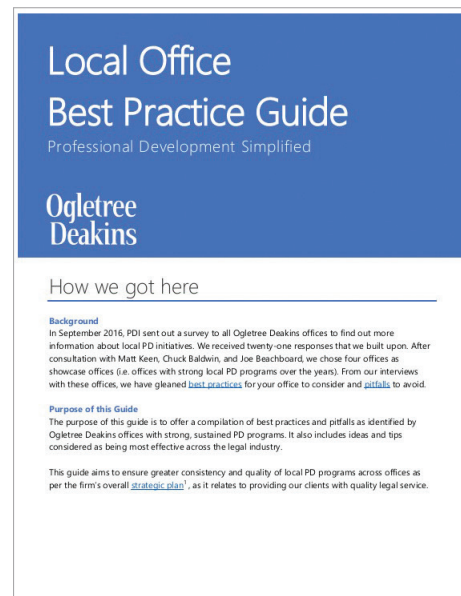
Leadership Development Training

For the sixth consecutive year, PDI has offered a formal leadership development program for senior associates who are within one year of shareholder eligibility, led by master coach Joan Newman, Esq. This program is aimed at helping participants identify and develop the leadership and organizational skills they need to meet the expectations of the firm.



The PDI department also worked with Newman to offer individual in-depth coaching to address specific developmental needs.

Local Office Professional Development Best Practice Guide



PDI has acted as a PD resource for offices at the local level for various professional and/or business development issues (e.g., providing PD resources for Atlanta, Birmingham, Dallas, Denver, Detroit (Metro), San Diego, and San Francisco, among others; connecting

individual attorneys with resources in other administrative departments, etc.).

This year, we also created the Local Office Best Practice Guide, which will be a guide for Office Managing Shareholders and PD Ambassadors to utilize in their local office PD initiatives. PDI interviewed several offices to put together the guide, which includes not only best practices, pitfalls, and sample PD opportunities, but also the resources that PDI and the firm make available to offices.

2017 diversity & inclusion

PROFILE, PROGRAMS, AND INITIATIVES



Diversity and Inclusion Steering Committee

The Diversity and Inclusion Steering Committee (DISC) supported the work of the PDI department by acting as an advisory body, as reviewers, and as content developers, presenters, and panelists for internal trainings.

The DISC has created a network of diversity office ambassadors who work with Office Managing Shareholders (OMS) to support national diversity initiatives and to identify local development needs and resources. Ambassadors liaise with the DISC member that oversees their diversity region.

DISC members are the diversity and inclusion (D&I) liaisons for the offices that are within the region they oversee. Each member has the overall responsibility for identifying and being a resource for the Diversity and Inclusion Ambassadors in those offices.



Diversity and Inclusion Ambassadors

The Diversity and Inclusion Ambassadors (DIA's) are the resident representatives of the PDI department at each Ogletree Deakins office.

The DIA's liaise with and receive guidance and support from the DISC liaison for the office.

Throughout 2017, the DIA's continued to work with the Office Managing Shareholder's to support local D&I initiatives and to implement national D&I initiatives locally.

Firm-Wide Diversity and Inclusion Programs and Initiatives

Impact and Recognition

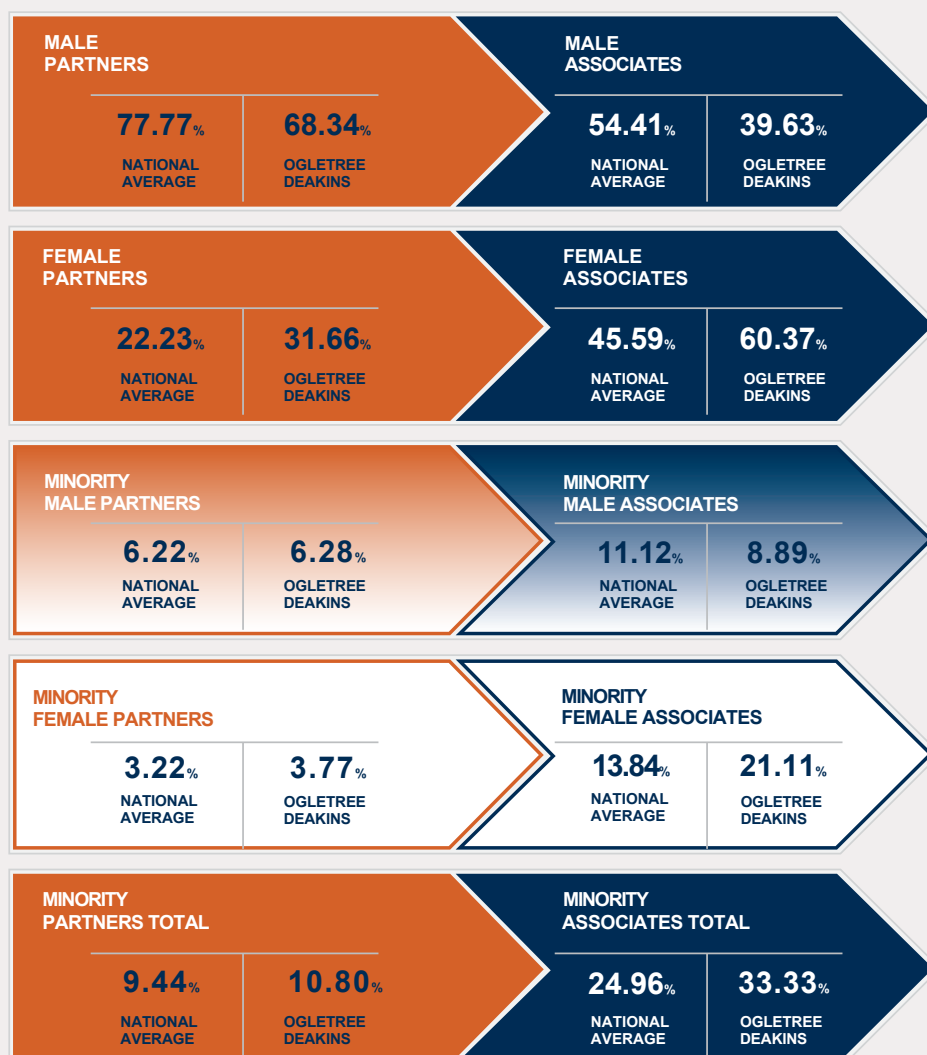
This year, the PDI department continued to work diligently to enhance the firm's overall profile for diversity and inclusion. As a result, the firm received several awards and recognition from various media outlets, organizations, and clients across the United States. Examples include:

- In May 2017, Ogletree Deakins won the Riley Institute's **Upstate Diversity Leadership Award for Outstanding Business**. Established in 2004, this award recognizes a business that exhibits leadership in promoting diversity in the Upstate South Carolina region.
- In June 2017, Ogletree Deakins earned the ranking of **#15 out of the top 25 firms for overall diversity on the Vault Associate Satisfaction Survey**. The firm maintained its **#4** ranking in the labor and employment practice area (out of approximately 120 eligible law firms). This survey measures associates' perception, of firm culture and diversity, and was administered to over 17,000 associates.
- In September 2017, for the second time in firm history, Ogletree Deakins was recognized as a **Women in Law Empowerment Forum (WILEF) Gold Standard firm** for leadership roles achieved by equity women partners.
- In October 2017, for the second time in firm history, Ogletree Deakins received a **perfect score on the Human Rights Campaign's Corporate Equality Index**, an instrument measuring LGBT-friendly policies and practices.



Diversity Metrics

Ogletree Deakins continued to exceed the National Association for Law Placement's national diversity numbers in all demographics except for minority male associates. PDI continued to work collaboratively with the firm's Recruiting and Retention department in cosponsoring and jointly interviewing potential candidates at various minority job fairs across the country. PDI will work to maintain its place as a leader in recruiting and retaining minorities, and to increase the firm's minority male percentage in 2018.



NALP vs. Ogletree Deakins U.S. Diversity Metrics

(2016 NALP vs. of ODNSS numbers are as of September 30, 2017)

Diversity Discussions

In 2017, PDI Director Michelle Wimes accepted seven speaking engagements (see list below). These local, regional, and national engagements allowed Michelle to share the successful programs and initiatives that Ogletree Deakins implements across its 52 offices.

Date	Event	Topic	Location
2/5/17	Charting Your Own Course Career Development Conference	“Inside the Performance Review Process: Deconstructing Formal Partner Appraisals and Self-Evaluations by Associates” (Panelist)	Orlando, FL
2/10/17	St. Teresa’s Academy Junior Law Society	“So You Want to Be a Lawyer: Myths and Truths” (Keynote)	Kansas City, MO
2/14/17	Central Exchange	“Work-Life Integration: The Heart of the Matter” (Keynote)	Kansas City, MO
3/31/17	National Summit of Black Women Lawyers	“Own the Room: Utilizing Resiliency Strategies to Overcome Implicit Bias and Forge Pathways for Success” (Panelist)	Chicago, IL
6/24/17	Suburban Balance	“The Journey to Becoming My Best Self” (Keynote)	Kansas City, MO
10/12/17	OD Kansas City: Managing a Workforce in 2018	“Diversity and Inclusion: Envisioning the Future Together” (Keynote)	Kansas City, MO
10/26/17	Manual Career and Technical Center Career Fair	“Embracing Technology in the Legal Profession” (Keynote)	Kansas City, MO

National and Regional Diversity and Inclusion Events Sponsored By PDI

To help move the diversity needle forward in the legal profession, Ogletree Deakins sponsored more than 30 national and regional events in 2017. These events provided professional and leadership development, client networking and relationship building, speaking engagements, and white paper publication opportunities to our lawyers.

NATIONAL EVENTS

Charting Your Own Course Career Development Conference
National Bar Association Commercial Law Section 30th Annual Corporate Counsel Conference
ACC Foundation Good Lawyers to Great Lawyers Retreat
Diversity & Flexibility Alliance Annual Conference
Human Rights Campaign Los Angeles Annual Gala Dinner & Auction
Black Women Lawyers Association
Hispanic National Bar Association Corporate Counsel Conference
National Employment Law Council Annual Conference
National Association of Women Lawyers Annual Meeting & Awards Luncheon
National Bar Association 92nd Annual Convention & Exhibits
LGBT Bar Annual Lavender Law Conference & Career Fair
ABA Commission on Women in the Profession – Margaret Brent Awards Luncheon
Hispanic National Bar Association Annual Convention & Career Fair
ACC Care and Feeding of In-House Counsel—Dinner Discussion Series
Corporate Counsel Women of Color Conference
Minority Corporate Counsel Association Diversity Gala
ACC Foundation Corporate Counsel Classic
Society for Human Resource Management Diversity & Inclusion Conference & Exposition
National Bar Association Labor and Employment Section Annual Conference
Human Rights Campaign National Dinner
National Asian Pacific American Bar Association Annual Convention
National Association of Women Lawyers General Counsel Institute

REGIONAL EVENTS

WIN for KC Women's Sports Awards Celebration
Project Equality Diversity and Inclusion Summit
University of Missouri at Kansas City Starr Women's Hall of Fame Luncheon
University of Missouri at Kansas City Diversity & Inclusion Annual Pride Scholarship Breakfast
Women of Color Leadership Conference
Hispanic Development Fund (Named Scholarships)
BoysGrow Fall Farm Festival
National Association for the Advancement of Colored People 50th Anniversary Freedom Fund Banquet
Heartland Men's Chorus Dinner of Note

Resource for Best Practices

Due to the Ogletree Deakins proven success as a D&I leader in the legal industry, several law firms and legal departments consulted PDI, which served as a resource on best practices throughout 2017 by providing numerous resources, having in-person meetings, and participating in conference calls. These organizations included:

- o Alstom Signaling Operation, LLC – Grain Valley, MO
- o Association of Law Firm Diversity Professionals – Washington, D.C.
- o Barnes & Thornburg – Indianapolis, IN
- o Children’s Mercy Hospital – Kansas City, MO
- o Compass Minerals – Overland Park, KS
- o Dentons – Atlanta, GA
- o DePaul University College of Law – Chicago, IL
- o Husch Blackwell – Kansas City, MO
- o K&L Gates – Washington, D.C.
- o National Football League – New York, NY
- o Niles Home for Children/KVC Health Systems, Inc. – Kansas City, MO
- o Sedgwick LLP – Kansas City, MO
- o St. Teresa’s Academy – Kansas City, MO
- o University of Wisconsin-Milwaukee – Milwaukee, WI
- o Winston & Strawn – Washington, D.C.

Diversity Recruitment Efforts

The PDI department **utilized its D&I network** to support the firm’s diversity recruiting efforts by sponsoring national diversity job fairs, interviewing candidates, and forwarding high-potential resumes to Office Managing Shareholders and the firm’s Recruiting and Retention department for employment consideration.

Support for Diverse Attorneys

Reduced-Hours Advisors



Theresa Donahue Egler
(Shareholder, Morristown)



Kelly S. Hughes
(Shareholder, Charlotte)

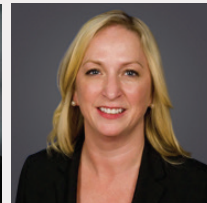
PDI continued its support of the firm’s two Reduced-Hours Advisors (RHAs), Theresa Donahue Egler (Shareholder, Morristown) and Kelly S. Hughes

(Shareholder, Charlotte), and local offices regarding requests for reduced-hours schedules by monitoring existing reduced-hours arrangements, providing access to resources that help to sustain success while working a reduced-hours schedule, and helping to ensure these arrangements are productive. The firm currently employs 83 attorneys who work a reduced-hours schedule. This number represents approximately 10 percent of the firm’s total attorney population.

Women’s Initiative



Ashley Prickett Cuttino
(Shareholder, Greenville)



Kerri S. Reisdorff
(Shareholder, Kansas City)

PDI continued its support of the firm’s women’s business resource group, ODWIN (Ogletree Deakins Women’s Initiative), which is co-chaired by

Ashley Prickett Cuttino (Shareholder, Greenville) and Kerri S. Reisdorff (Shareholder, Kansas City). The executive sponsor of this group is Melissa Bailey (Shareholder and Board Member, Washington D.C.). PDI successfully highlighted members of the group and its leaders in its new e-newsletter, *The PDI Connection*. PDI also helped ODWIN schedule and coordinate attendance at various events around the country, including the firm’s Attorney Retreat and regional professional development workshops for female in-house counsel.

ODWIN constantly seeks new avenues to focus its efforts more keenly on supporting women’s business development and leadership opportunities within the firm. This relentless effort has led to Ogletree Deakins progressive movement toward assisting female attorneys in attaining the highest leadership levels in the firm.

Notably, in April 2017, Ogletree Deakins Board of Directors established a task force consisting of six shareholders (four women and two men) to **study issues relating to the advancement and recognition of women** in the firm and to obtain feedback from shareholders

on improvements to promote and support the retention and advancement of women. The task force ultimately received feedback from 60 women shareholders, approximately 45 percent of the firm's total number of women shareholders, as well as a number of male shareholders. The task force received constructive feedback aimed at the advancement and recognition of women, as well as suggestions for improvements that will positively impact both men and women. The task force met in person for a full day to discuss the feedback. It provided its recommendations to the Board of Directors, and the two groups engaged in a thorough, thoughtful, and collaborative discussion.

The Board fully considered all information and recommendations provided by the task force, and announced the following initial steps:

- **Creation of a Credit Guidelines Committee:** The firm has established a limited-duration study committee to review its current credit definitions and allocation system, consider input from shareholders, and make recommendations to the Board on any needed clarifications or related guidance regarding the credit process and definitions used to designate credit allocations. The committee includes a diverse group of equity and nonequity shareholders.
- **Creation of a Credit Allocation Appeals Committee:** To create additional avenues for attorneys to be heard on credit issues, if after thorough discussion they cannot agree upon credit allocation, credit disputes may be brought before the Credit Allocation Appeals Committee, which includes the Managing Shareholder and four equity shareholders.
- **Enhancement of the Compensation Committee Process:** The Board and Compensation Committee will continue to review the established process to ensure that they remain fair and open as the firm continues to grow. The work of the Credit Guidelines Committee should promote improved understanding concerning the credits reviewed by the Compensation Committee. In addition, the following steps will be taken:
 - **Establish a Compensation Appeals Process:** As an additional check in compensation decisions, the firm will establish an appeals process for shareholder compensation recommendations.
 - **Pay Equity:** The task force emphasized the importance of pay equity. The Board agrees that this is an important issue to ensure fair treatment and the success of the firm. The Board has asked that the Compensation Committee take additional steps to ensure that the results of the compensation process are consistent with both the law and principles of pay equity.
- **Representation**
 - **Leadership Positions:** The Board remains committed to meaningful diversity in leadership positions at the firm, office, and practice group levels. The Board has considered this principle in all nominations.
 - **ODWIN:** The Board has asked that ODWIN continue to develop specific, regular programs aimed at women's business and leadership development across the firm.
 - **Training Opportunities:** The Board asked that the PDI Department continue to include equal representation of women in business development training programs.





A Women's In-House Counsel Leadership Institute program

- **Client-Facing Opportunities:** The Client Services Department will track participation in significant client proposals and pitches to help ensure proper representation by women and other diverse attorneys. Client Services will continue to involve women and diverse attorneys at firm seminars and events.
- **Ombudsperson:** The Board has created a D&I ombudsperson who will be available to consult with firm attorneys who desire guidance on related issues. The firm plans to implement an anonymous hotline that may be used to reach the ombudsperson or otherwise to report concerns that arise in the workplace.
- **Benefits and Flexible Work:** The Board reviewed the firm's current benefits offerings primarily impacting women and relating to leaves and flexible work arrangements. The Board has taken the following steps:
 - Effective October 1, 2017, the Paid Family Leave policy for attorneys was revised to increase the maximum paid leave period from 12 to 16 weeks.
 - Working-parent back-to-work support: The Board approved a ramp-up and backup childcare program to assist parents transitioning back to work, to include guidance from shareholders who have transitioned back with children, primarily through a new Business Resource Group, ODFamily.
 - Accounting for protected leave: The Compensation Committee will formally adjust hourly targets for shareholders on protected leave and on leave covered by the firm's policy on Paid Family Leave for attorneys, and reflect this on dashboards, a practice that has been done informally in the past. In addition, in reviewing historical and current compensation data, protected leave will be noted on compensation data and reporting provided to the committee.

PDI recognizes that one way to support female attorneys is to help them increase their books of business so that they can become equity shareholders. In 2017, the firm continued its participation in the national **Women's In-House Counsel Leadership (WIHCL) Institute** program, by hosting five cities in 2017: Detroit, New York, San Francisco, Costa Mesa and Boston. In this program, 25 women in high-level positions who were primed to become general counsel within five years were handpicked and given leadership development training as well as access to a robust women's resource network. The leadership workshops were exclusive to invited in-house attorneys, and designated Ogletree Deakins women shareholders moderated panel discussions in each city and participated in networking receptions and dinners hosted by the firm. Through these workshops, the in-house counsel took advantage of WIHCL's integrated series of programs to expand their skills, improve their competencies, develop their networks, and advance their careers. In doing so, our women lawyers built relationships and networks that will undoubtedly pay off in the future.

Additionally, the firm continued its membership with **Women's Leadership Edge (WLE)**, a program focused on advancing women attorneys to the next level of their career. Ogletree Deakins attorneys receive practical, evidence-based tools to effectively retain, support, and advance women from within the firm.

Throughout the year, PDI also continued to assist ODWIN with demographic/attrition metrics and resources on work-life balance to ensure the objectives of the attorneys and the firm were being met successfully.

As of September 30, 2017, the firm employed 389 female attorneys. This number represents approximately 45 percent of the firm's total attorney population.

African-American Business Resource Group



Dawn T. Collins
(Shareholder, Los Angeles)



Danielle Ochs
(Shareholder,
San Francisco)

PDI continued its support of the Ogletree Deakins Black Attorney Resource Group ODBAR, by working with the leaders of

this group, Danielle Ochs (Shareholder, San Francisco) and Dawn T. Collins (Shareholder, Los Angeles), to design initiatives to bring greater visibility to the group and support their new mentorship and sponsorship programs. The executive sponsor of this group is Ron Chapman Jr. (Shareholder and Board Member, Dallas).

Hispanic/Latino Business Resource Group



Rodolfo R. (Fito) Agraz
(Shareholder, Dallas/
Raleigh)



Stephen J. Quezada
(Associate, Houston)

PDI supported the firm's Hispanic/Latino business resource group, ODAdeleante, by collaborating with the leaders of this group, Rodolfo R.

(Fito) Agraz (Shareholder, Dallas/Raleigh) and Stephen J. Quezada (Associate, Houston), to assist with their professional and client development efforts.

Asian-American Business Resource Group



Gregory C. Cheng
(Shareholder,
San Francisco)



Sarah J. Hawk
(Shareholder, Raleigh/
Atlanta)



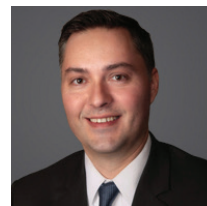
Gillian P. Yee
(Shareholder, Detroit
(Metro))

PDI continued its support of the firm's Asian-American business resource group, ODA3, led by Gregory C. Cheng (Shareholder, San Francisco); Sarah J. Hawk (Shareholder, Raleigh/Atlanta); and Gillian P. Yee (Shareholder, Detroit (Metro)). ODA3 sponsored a well-attended client event at the 2017 National Asian Pacific American Bar Association (NAPABA) Convention as well as a speed networking event at the firm's 2017 Attorney Retreat.

Lesbian, Gay, Bisexual, and Transgender (LGBT) Business Resource Group



Natalie N. Turner
(Shareholder, Atlanta)



Adam T. Pankratz
(Shareholder, Seattle)



Keith A. Watts
(Shareholder,
Orange County)

PDI supported the firm's LGBT business resource group, ODAliance, whose primary focus is on LGBT equality and workforce inclusion. This group is being led by Natalie N. Turner (Shareholder, Atlanta); Adam T. Pankratz (Shareholder, Seattle); and Keith A. Watts (Shareholder, Orange County).

Family Business Resource Group



Kelly S. Hughes
(Shareholder, Charlotte)



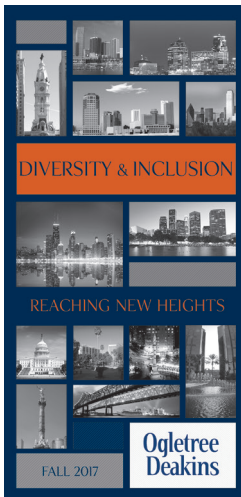
Trina R. Le Riche (Office
Managing Shareholder,
Kansas City)

PDI supported the launch of the firm's first family business resource group, (ODFamily), which is co-chaired by Kelly

S. Hughes (Shareholder, Charlotte) and Trina R. Le Riche (Office Managing Shareholder, Kansas City). ODFamily will serve as a resource to support attorneys during times of transition and stress, while allowing everyone to live authentic lives and bring their whole selves to work. This will be accomplished by utilizing the four C's: compassion, connection, confidentiality, and communication.

professional development & inclusion publications

The PDI department continued to provide greater visibility for the firm's accomplishments in the professional development and diversity and inclusion arenas. These efforts included a newly developed professional development brochure, an enhanced diversity brochure, and four new electronic issues of the *PDI Connection* and quarterly blog posts on the firm's internet site. Samples of PDI publications are below.



17 NOV Mitigating Employment Litigation Landmines With Workplace Diversity and Inclusion Efforts



Meaningful diversity and inclusion efforts in the workplace have evolved from being the right thing to do to being the smart thing to do—and now they are quickly moving toward being the essential thing companies must do to ensure success.

[LEARN MORE](#)

18 SEP Athletes and Employees Speak Out: Do Your Employment Practices Drop the Ball in Addressing Diversity, Controversial Speech, or Tensions at Work?



With the 2017-18 National Football League (NFL) regular season and National Basketball Association (NBA) pre-season underway, many spectators are excited to don their favorite players' jerseys and cheer on their teams. Yet in recent years, many fans also find themselves equally entrenched in controversial debates that have little to do with who wins or loses the game.

[LEARN MORE](#)

18 JUL Is Your Investigator More Biased Than You Think? Part II: How to Keep Truthiness Out of Your Workplace Investigations

All companies should have mechanisms through which employees can voice concerns and feel confident that (a) those concerns will be taken seriously, (b) those concerns will be fairly and promptly investigated, and (c) misconduct, if it is found, will be corrected. However, if unconscious bias infects decision-making when it comes to workplace investigations, employees will feel the system is rigged against them—no matter how well-written a company policy is, no matter how many avenues are given to employees to lodge complaints, and no matter how much a company talks about a culture of accountability. Fortunately, there are a number of steps workplace investigators can take to minimize the chances that this will occur.

[LEARN MORE](#)

12 JAN Raising the Bar to a Perfect Score: Corporate Equality Index to Look for Expanded Health Benefits as Measure of LGBT Workplace Equality and Inclusion



conclusion

We hope you enjoyed the 2017 Annual Report of the Professional Development and Inclusion Department of Ogletree Deakins. For more information about the firm's professional development and inclusion efforts, please feel free to contact Michelle Wimes at michelle.wimes@ogletree.com.





Ogletree Deakins

Atlanta ▪ Austin ▪ Berlin (Germany) ▪ Birmingham ▪ Boston ▪ Charleston ▪ Charlotte ▪ Chicago ▪ Cleveland ▪ Columbia ▪ Dallas ▪ Denver
Detroit (Metro) ▪ Greenville ▪ Houston ▪ Indianapolis ▪ Jackson ▪ Kansas City ▪ Las Vegas ▪ London (United Kingdom) ▪ Los Angeles ▪ Memphis
Mexico City (Mexico) ▪ Miami ▪ Milwaukee ▪ Minneapolis ▪ Morristown ▪ Nashville ▪ New Orleans ▪ New York City ▪ Oklahoma City
Orange County ▪ Paris (France) ▪ Philadelphia ▪ Phoenix ▪ Pittsburgh ▪ Portland ▪ Raleigh ▪ Richmond ▪ Sacramento ▪ San Antonio ▪ San Diego
San Francisco ▪ Seattle ▪ St. Louis ▪ St. Thomas ▪ Stamford ▪ Tampa ▪ Toronto (Canada) ▪ Torrance ▪ Tucson ▪ Washington, D.C.