Professional Development Consortium

Linkletter

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Chair's Note

by Jim Lovelace

Our Spring 2015 issue of the Linkletter wonderfully illustrates what the PDC is all about. First, our PDC colleagues and their firms constantly innovate, and what's more, they share their best practices with their peers. (See our new "Innovations in the Industry" feature showcasing Orrick's partnership with the Fullbridge Program to teach corporate savviness to senior associates.) Second, the PDC delivers topical and cutting-edge programming featuring our members, Trusted Advisors and other industry thought leaders. (See the highlights and links for the four Trusted Advisor webinars held since last fall, plus information on our upcoming Summer Conference in San Francisco July 9 - 11.) Third, PDC members lead and participate in vibrant local groups throughout the U.S. and Canada. (See the Local Group Spotlight updating us on the Texas Professional Development Group.) Finally, and most importantly, for 25 years the PDC has fostered a community of professionals who love to learn and grow and help others do so as well. In the process, we've had a lot of fun . . . and many of us literally have walked some miles together (thank you, Burt). (See "Reflections on the PDC's 25th Anniversary" interview with longtime PDC member, former PDC Chair, and current New York City Local Group Leader, Burt Lipshie.)

This is my last Chair's Note, as I'll be leaving the PDC Board in July after five rewarding years. I'd like to offer a "shout out" to the Fullbridge Program, which has agreed to be the PDC's first-ever Visionary Corporate Partner. I'd also like to pay special thanks to several people who've been instrumental to the Linkletter: PDC Board colleague Gillian Murray, who conceived of and launched the Linkletter in early 2013; PDC Board colleague Marni Becker-Avin, who took the reins as editor in 2014 and transitioned the newsletter to its "current look"; and the indispensable Sally Burroughs, Coordinator of Association Services, who solicits and pulls together all of the content.

Thank you!

Jim
PDC Chair

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REFLECTIONS ON THE PDC'S 25TH ANNIVERSARY

BURT LIPSHIE is a 1967 cum laude graduate of Columbia Law School, and since 1977, has been the Managing Attorney of the Litigation Department of Stroock & Stroock & Lavan, Director of the firm's Attorney Enrichment Program, and Co-Chair of its CLE Committee. Burt is also Adjunct Professor of Law at Cardozo School of Law, where he teaches Legal Writing and New York Practice. He has been voted "Outstanding Adjunct Professor" by the graduating class 18 times in the last 22 years. Burt is Past Chair of the PDC. He also served on the New York State CLE Board. He is a former member, and Panel Chair, of the Departmental Disciplinary Committee of the First Department. He is a long-time member of the Advisory Committee on Civil Practice to the Chief Administrative Judge of the State of New York. Burt is co-author of *New York Civil Procedure Before Trial*, published by James Publications. He delivers an annual Civil Practice Update for the New York State Unified Court System Judicial Seminars. He lectures on New York Civil Practice at various Bar Associations throughout the State, as well as the annual CPLR Update program for the Practising Law Institute.

A member of the PDC since 1995, Burt Lipshie has long served as one of the organization's leaders and active members. Whether as the Chair of the PDC Board or as the leader of his annual conference walking tour, Burt is known for his dedication to the PDC and its members. As the PDC celebrates its 25th anniversary, Burt reflects on the history of the PDC, his favorite memories as a PDC Member, and his ideas regarding the role of the PDC in the future of the legal professional development industry.

Burt attended his first PDC conference in San Antonio in 1996. Due to growth of the PDC and the evolution of the industry, early PDC conferences had a very different look and feel than today's conferences. Burt recalls, "In the early days, most of us were responsible in our firms pretty much exclusively for training: writing programs, corporate drafting programs, litigation skills programs, substantive law updates, etc. The agendas at PDC conferences reflected that responsibility. We rarely had outside speakers. We had no RFPs. Conference planners would think about topics that we thought ought to be covered, and then we'd reach out to members we thought would cover those topics well. I can recall Steve Armstrong, Clyde Leland and I doing an all-morning program on teaching writing and Josie Ganek doing one on teaching corporate skills. I remember Debra Forman regaling us and demonstrating this new-fangled toy for delivering information that most of us were convinced would never catch on. I think she called it PowerPoint." Some of Burt's favorite memories of the PDC's early days are from these conferences, during which the 30-40 attendees had time to really discuss the successes and failures of various programs they had tried. "If someone talked about having done a program you were thinking about doing – whether it had worked or failed – you then knew there was someone you specifically wanted to catch up with," says Burt. "Having each person talk about what they have done is obviously much harder to do now with attendance at the conferences having grown so much. But our creative conference planners seem to always find a way to make the networking work." Today, even with greatly increased conference attendance, the PDC conferences creatively foster networking opportunities for PDC members to maintain the intimate atmosphere.

In the years since Burt's first conference in San Antonio, the field of legal professional development has evolved to encompass a much wider range of responsibilities and roles, and Burt sees that the PDC has evolved with it to meet the needs of its members. "Now our members tackle much vaster initiatives, and our conferences reflect that. We are responsible for not just teaching, but also guiding our firm leaders in things like business development, leadership, succession planning, and project management. We do reviews, sometimes of 360 degrees. Some of us are trained as coaches. The list is ever-expanding, and the PDC has expanded to meet that need. Some of us are now the 'thought leaders' (whatever in the world that means) in areas of law firm life that were not remotely envisioned 25 years ago. And the sharing of that expertise – whether by members, or by 'trusted advisors,' or by other consultants – has become the core of most of our conferences."

> *"If someone talked about having done a program you were thinking about doing – whether it had worked or failed – you then knew there was someone you specifically wanted to catch up with..."*

In addition to the evolving look of the PDC's conferences, the role of the PDC throughout the year has evolved as well. The PDC has developed the Competency Model, increased educational offerings, and enhanced communication vehicles. While Burt sees that the roles and responsibilities of the PDC and its members have grown and changed in the 25 years since the PDC was founded, he finds that the heart and soul of the PDC remain the same. "The most important role of the PDC is to continue to be the ultimate 'support group' for those of us constantly struggling to accomplish the goals we each set out in our own elevator speeches," Burt reflects. "I know that when I am wrestling with an issue, there is a vast audience of colleagues who have dealt with the same issue, or are struggling as I am, just an e-mail away. That has been, is, and I have no doubt will remain, the heart of this organization. It is what makes us unique in this field."

While it is difficult to look ahead to predict the future of legal PD, Burt predicts that the role of legal professional development professionals will continue to expand and evolve and that the PDC will continue to grow and adapt to meet the new needs of its members and stay on the cutting edge of the industry. Regarding the future of the PDC, Burt says, "I see the organization continuing to be the most reliable resource for those doing their firm's professional development, and therefore continuing to grow. I remember at one turn-of-the-millennium conference, our then Membership Chair, Mark Cowing, proudly announced at the business meeting that the PDC had just enrolled its 200th member. And look at us now, just a decade and a half later. I also think the need for the things we do in our firms will only increase as the practice of law continues to get more complicated. And, soon, there will be a whole new generation emerging from the law schools and into our firms – what will we call them, 'post-millennials', perhaps? And they will be completely different from the mid-level and junior associates we guide now. In what ways? Ahhh, that will be what makes it interesting. And everything we do will have to adjust, yet again. But I know this group. We're up for it."

In addition to serving as a leader in the PDC, Burt Lipshie is also known for his annual walking tours held each year during the PDC Summer Conference. A tradition since 2002, Burt has hosted some of his most memorable walking tours in cities including Boston, Seattle, San Francisco, and most recently, Montreal. Burt says, "my favorite PDC Walk memories include Boston, where Larry Brown acted as 'sweep' as we walked across the city to our dinner at the harbor, and, but for him, half of the large group would have gotten lost; Seattle, where a bunch of us did get lost on our way to dinner – again around a construction site; and last year in Montreal, where I led a pre-conference historical (if not hysterical) walking tour of Old Montreal, including views of the original city wall, a house from the 18th century, and a stop for croissants at the site of the original settlement of Montreal." Burt's San Francisco walking tour in 2003 went from Union Square to the Golden Gate Bridge and was so popular that Burt hosted a second walk for members who missed the first and wanted to take the tour after hearing about it from other conference attendees. Burt looks forward to hosting the same walk at this year's conference, and invites any PDC members to join him who would like to take a walk from Union Square to the Golden Gate Bridge.

Throughout the 25 years since the PDC was formed, Burt feels that the PDC has played an important role supporting professionals in legal PD, and he knows that the PDC will continue to support professionals in the legal PD field as the industry evolves. "Our roles will continue to expand and change, and the PDC will respond to those changes," Burt says. Whatever changes the industry undergoes in the future, Burt is confident that the PDC and its members are up for it.

INNOVATIONS IN THE INDUSTRY

Orrick, Herrington & Sutcliffe's Business Training Program for Senior Associates

CAROLYN OLDER BORTNER is the Director of Lawyer Development at Orrick, Herrington & Sutcliffe LLP. Carolyn leads the performance review and bonus process for all associates and of counsel, and oversees attorney training and development. During her tenure at Orrick, Carolyn has played a key role in developing and implementing Orrick's merit-based talent model. Prior to joining Orrick, Carolyn was the Manager of Professional Development and the Manager of Legal Recruiting at Clifford Chance. She also practiced as a litigator and worked in career services. Carolyn holds a B.A. and a J.D. from the University of Pennsylvania.

ANGELIQUE MAGLIULO-HAGER is the Lawyer Development Manager at Orrick, Herrington & Sutcliffe LLP. Angelique oversees attorney training firmwide, including academies and bootcamps, practice group trainings, and business development initiatives. Prior to joining Orrick, Angelique was the Assistant Director for Law Career Development at Santa Clara University School of Law. Angelique practiced as a transactional attorney for several years before transitioning into professional development. Angelique holds a J.D. from Boston University School of Law and a B.A. in Politics & Drama from Occidental College. Angelique co-leads the San Francisco Bay Area PDC city group and is a member of the Nominations Committee.

In a highly competitive legal environment, it is vital for firms to distinguish themselves on the commerciality of their advice. Associates capable of providing commercially savvy advice gain an edge in the market when they develop a relationship with clients as a trusted advisor with an understanding of the distinct needs of each client. Believing the development of this commercial savviness to be vital to the success of associates, Orrick, Herrington & Sutcliffe has elected to provide training in this area to its associates rather than leaving the development of these skills among associates to chance. To supply this training, Orrick has partnered with Fullbridge, a provider of business-focused training to leading law firms, to deliver training in business and commercial savviness directly to its senior associates. This training program is the first of its kind provided for senior associates by Fullbridge and aims to provide them with the skills necessary not only to compete in the legal market but to become successful firm leaders in the future.

Fullbridge has delivered such programs to junior associates in the past, but this training created in partnership with Orrick was the first program specifically designed and delivered for senior associates. Together, Orrick and Fullbridge developed an intensive seven-day immersion program for Orrick's senior associates designed to provide the skills necessary to deliver legal advice reflecting a distinctive understanding of each client's industries and business challenges. This program was co-taught by Fullbridge trainers and Orrick partners, and was designed like a mini-MBA course. In addition to leadership, communication, relationship-building and effective project management skills, dozens of senior associates from across Orrick's offices and Business Units learned how to analyze financial information, understand the drivers of valuation and conduct sophisticated business research.

The culmination of this training program was a competitive team project requiring teams to convince a hypothetical board of executives to buy or build a product. Each team provided both written and oral presentations to Orrick partners outlining a business, financial and legal analysis of the product and their strategy. The winning team then presented to Orrick's chairman and other firm leaders. Throughout the program, each team was assigned to a Fullbridge coach with deep experience in finance and business who was able to effectively impart knowledge to the participants, adding a unique dimension to the training program.

The training is challenging for associates, but highly valuable, as the skills gained in this program go beyond simply providing a competitive edge in the market. In Orrick's view, commercial savviness is vital not only to delivering quality results and developing trusted advisor relationships, but also to making those critical cost-benefit decisions that keep projects on time and on budget.

> *"Associates capable of providing commercially savvy advice gain an edge in the market when they develop a relationship with clients..."*

In its inaugural year, Orrick took 32 senior associates off the playing field for seven intensive days to complete this course. As of this April, Orrick has hosted the Senior Associate Academy a total of four times, with over 100 graduates. Participants in this training program liken the intensity to trial preparation or a major closing, and have described this program as the best training experience of their careers.

A note from the Linkletter staff regarding the Innovations in the Industry section

The "Innovations in the Industry" is a new feature section of the Linkletter dedicated to showcasing the innovations and accomplishments of our PDC members. Whether you or your team has created a new program, established a ground-breaking method of approaching professional development in your firm, or researched an alternative process for finding success in the legal PD field, we want to hear from you! Send us your article of 500-1000 words discussing some of the following items:

- What is the purpose of your program/model/research?
- How did you/your team accomplish this?
- What makes this accomplishment innovative?
- What has been the impact of your program in your firm or in the legal PD field?

All submissions may be emailed to newsletter@pdclegal.org. If you have questions about your article submission, contact Sally Burroughs at sburroughs@pdclegal.org, or the PDC office at 703-506-2027.

LOCAL GROUP SPOTLIGHT: Texas

The Linkletter is adding a new recurring feature where we will focus on the work being done at the local level by members of the PDC. If your local group is interested in featuring its programs in an upcoming issue of the Linkletter, contact Sally Burroughs at sburroughs@pdclegal.org.

Local Group Leaders: Amy Hancock, Andrews Kurth LLP, and Cindy Lindsley, Thompson & Knight LLP
Cities: Houston, Dallas, Austin
Meets: Quarterly

AMY HANCOCK

CINDY LINDSLEY

TEXAS PD
Texas Legal Professional Development Group

The Texas Legal Professional Development Group (Texas PD) was founded in 2006 by current group leaders Amy Hancock, Director of Attorney Professional Development at Andrews Kurth LLP, and Cindy Lindsley, Practice Group Manager at Thompson Knight LLP, with Kelly Mixon Morgan, National Director of Attorney Hiring at Fish & Richardson P.C., and Tammy Patterson, formerly the Director of Recruiting and Professional Development, Gardere Wynne Sewell LLP (and now the CEO and President of the NALP Foundation). Presently, the group includes about 40 members and meets quarterly, rotating between Houston, Dallas, and Austin for meetings during which members attend in person at the hosting law firm or call or video conference in.

> *"This time of sharing allows members to glean useful information regarding industry trends and developments from their colleagues in the field and to discuss takeaways and applications from recent educational conferences and events."*

Each meeting focuses on one topic and group members take turns "hosting" that topic. Sessions include an information sharing time during which members have the opportunity to hear about the industry practices and information. This time of sharing allows members to glean useful information regarding industry trends and developments from their colleagues in the field and to discuss takeaways and applications from recent educational conferences and events. In addition to information sharing, Texas PD meetings may also include presentations by vendors or consultants, which typically last no more than 30 minutes and are selected for inclusion in the agenda according to surveys of group interest in various topics. Most recently, the Texas PD group met on May 7, to discuss a presentation by Tammy Patterson, President and CEO of the NALP Foundation, on the findings of several of the Foundation's latest studies. See the article on these findings on page seven in this issue for more information.

The next Texas PD meeting is scheduled for September 2015, and will feature a presentation by the Fullbridge program. If you are interested in attending this meeting or in learning more about the Texas local group, email Amy Hancock at amyhancock@andrewskurth.com or Cindy Lindsley at cindy.lindsley@tklaw.com.

Additionally, Texas PD maintains an interest in establishing ties with other city groups and collaborating on their program offerings and resource-sharing capabilities, and would love to connect with other local groups or individuals interested in participating in or collaborating with the group. If you are interested in connecting with Texas PD, contact Amy Hancock at amyhancock@andrewskurth.com or Cindy Lindsley at cindy.lindsley@tklaw.com.

NALP FOUNDATION RESEARCH FINDINGS

A summary of the findings presented by Tammy Patterson, President and CEO of the NALP Foundation

On May 7, 2015, the Texas PD group welcomed Tammy Patterson, President and CEO of the NALP Foundation, for a presentation about the NALP Foundation's latest research findings from several newly released studies that offer well-considered insights and cutting-edge information for the legal profession. The studies summarized in this article include the *2015 Update on Associate Attrition, How Lawyer Evaluations Measure Up II, After the JD III: Third Results from a National Study of Legal Careers, and the Study of Law School Alumni Employment and Satisfaction Class of 2011 - Employment Outcomes Three Years After Graduation.*

The 2015 *Update on Associate Attrition* for calendar year 2014 is the fourteenth report in a series of research studies conducted by the NALP Foundation on associate attrition and mobility in law firms. Patterson shared some of the following findings from this study:

- Between 2013 and 2014, the NALP Foundation saw little change in associate hiring with respect to median hiring numbers. However, lateral hires outpaced the number of entry levels hired, something the Foundation has not seen reflected in other studies.
- Hiring levels have, overall, remained very flat over the last several years.
- Lateral hiring is on the uptick, especially at firms with 500 or more attorneys.
- The majority of those departing their firms, approximately 70%, went to a firm that was larger in size and in the same geographic region as the firm they were leaving.

This year, the NALP Foundation's second survey on lawyer evaluations, *How Lawyer Evaluations Measure Up II*, included all non-partner lawyers in a law firm in the study (not just those defined as "on-track towards partnership" associates). Tammy reported the following findings:

- A majority of firms do not offer any training to those conducting reviews. The evaluation committees at most firms seem to be composed of the same types of members, regardless of the firm's size.
- There seems to be a disconnect between what the firms think they are accomplishing with the self-evaluations/evaluations process and what the attorneys who are actually being evaluated think these self-evaluations accomplish. Firms report they administer them to establish future performance goals and assess and address performance but attorneys themselves reported they are either unsure as to why the evaluations take place or they are only a required "ritual or procedure" prior to being reviewed.

Patterson additionally covered the recently compiled and released findings from *After the JD III: Third Results from a National Study of Legal Careers*, which included research beginning in the year 2000 conducted by the ABF and the NALP Foundation to include over 5,000 lawyers studied over thirteen years with three specific, different points of contact, or "waves". One of the main parts of the study looked in-depth at mobility and movement over the thirteen year period.

- Between the first point of contact (Wave 1) and the third (Wave 3), the percentage of law school graduates in the business world not practicing law (and presumably not utilizing their law degrees) went up from 8.4 - 28%.
- These findings were also true for the surveyed participants who graduated from law schools ranked by US News and World Report in the Top 10 (and had many legal employment opportunities). 24% of grads from those law schools were not practicing law 13 years after graduation.

Finally, Tammy shared findings from the Foundation's *Study of Law School Alumni Employment and Satisfaction Class of 2011 - Employment Outcomes Three Years After Graduation.* On average, responding attorneys working in private law firms self-reported themselves as ranking 4.1 on a 5 point scale of satisfaction with their current jobs. Additional interesting findings from this report included that:

- Upon graduation, law students reported they felt the least prepared for law practice management and client relationship building skills, but felt law school had better-honed their legal skills and levels of ethics and professionalism.
- People were still generally satisfied (44% were extremely satisfied) with their decisions to get a law degree.

All of these findings provide great insight into the current state of the legal profession. The NALP Foundation has taken the lead on projects of importance to the profession, including initiating the first longitudinal study of lawyer careers, providing benchmark research on associate retention, and documenting attorney contributions to public service. There are many opportunities for members of the PDC to contribute to and benefit from the NALP Foundation. For more information about the Foundation, contact Tammy Patterson at tpatterson@nalpfoundation.org.

PDC PROGRAMS OVERVIEW:
Trusted Advisor Webinars

When the PDC launched the new Trusted Advisor program late last summer, one of the goals was to connect the Trusted Advisors with PDC members to share their insights and expertise. As a part of this initiative the PDC has hosted Trusted Advisor webinars on key issues in the industry, including diversity and sponsorship, leadership development, partner development, and writing skills.

Our next PDC Trusted Advisor Webinar will be hosted by Tracy LaLonde on Thursday, June 11 at 2:00pm ET.
This webinar is full. If you are interested in obtaining a recording of the webinar following the presentation, please email us at info@pdclegal.org.

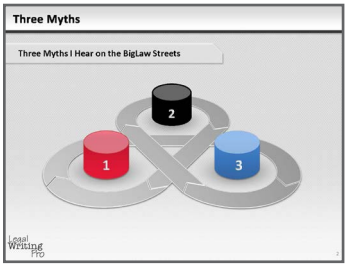
Even if you missed these educational events, it's not too late to learn from them and share them with your colleagues! Take a look at just a few of the insights shared during these presentations and follow the links to view the recorded webinars or presentation slides provided by our Trusted Advisors in the PDC Online Community.

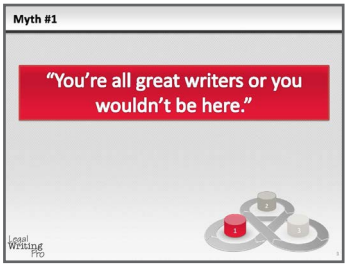
Legal Writing Rx: Diagnosing Symptoms and Prescribing Solutions

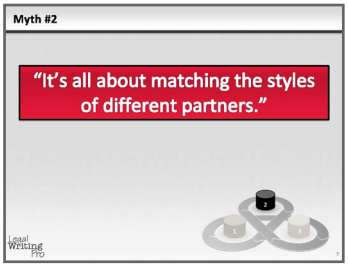
Presented by Ross Guberman, Legal Writing Pro

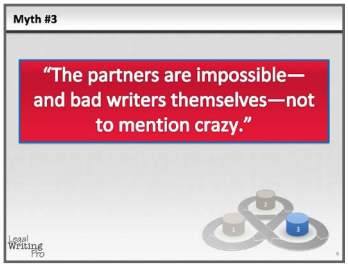
- There are three major myths prevalent among law firms in regards to writing skills:
  1) all legal PD practitioners are good writers;
  2) it is important to match the styles of different partners; and
  3) partners are often bad writers.
- Some of the top six symptoms of poor writing skills include a lack of control at the word level, trouble articulating case analysis and trouble articulating key takeaways.

To view the slides of this webinar, click here.

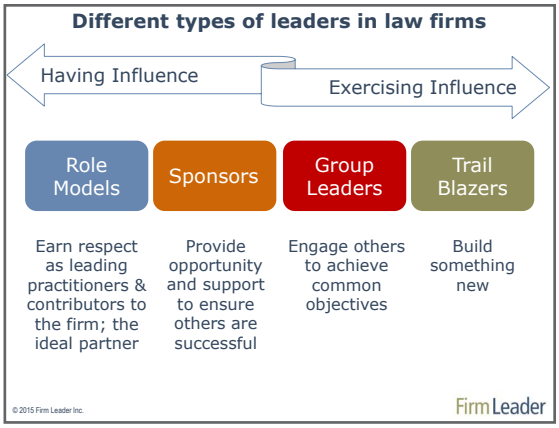








Developing Leaders in Your Law Firm
Presented by Steve Armstrong, Firm Leader, Inc. and Tim Leishman, Firm Leader, Inc.



- Some of the most effective means of developing law firm leaders occur outside of traditional leadership training opportunities and instead encompass a "learning-by-doing" approach, in which rising leaders are given new responsibilities such as management roles or as a position as chair or co-chair of a committee.
- New responsibilities should be carefully selected for rising leaders in order to set them up for success and avoid damaging "sink-or-swim" situations.
- Creating program and job descriptions addressing clear goals and responsibilities for both group leaders and mentors and senior management creates accountability and responsibility among both rising leaders and senior management and contributes to a successful "learning-by-doing" program.
- Sample modules for leadership training include topics such as strategic planning, managing change, building a leadership network, and more.

To view the recording of this webinar, click here.
To view the slides of this webinar, click here.

Strategies for Dealing with Difficult Partners
Presented by Scott Westfahl, Harvard Law School

- Difficult behaviors include abusive language and obnoxious behavior as well as disorganization and poor management. All of these behaviors have a negative effect on firm culture and productivity, decreasing employee engagement and increasing turnover.
- The three levers of influence on partners are generally money, power, and peer pressure. Money and power are generally not effective as incentives in influencing negative partner behavior, but creative forms of peer pressure such as upward feedback and metrics rating partners' perception among peers can encourage partners to improve their performance.
- Law firms will succeed when client service and development of the firm's people are equally valued. These values should be well articulated and prominent in all aspects of firm operations and culture, and positive behaviors and performance should be promoted and rewarded in partners who perform well in developing their associates.

To view the recording of this webinar, click here.
To view the slides of this webinar, click here.

Cultivating Diverse Talent through Sponsorship Programs
Presented by Ida Abbott, Ida Abbott Consulting

- The primary role of a sponsor is to advocate for their protégés and provide professional opportunities through key introductions and assignment of responsibility to the protégé. This allows firms to support women and minorities effectively by placing them in roles of leadership, rather than simply providing them with advice as they seek opportunities independently.
- Law firms are just beginning to explore sponsorship programs as a means of promoting the success of women and minorities and law firms. In a survey completed by PDC members, only 8 firms reported that their firms currently have sponsorship programs.
- Sponsors have the ability to influence outcomes within their firm, enabling them to focus on the career advancement of their protégés. Sponsors incur risk when they place their protégés in positions of greater leadership and responsibility, and so they must have great confidence in the ability of the associates they choose to sponsor.
- Firms that are beginning to implement sponsorship programs may use a variety of methods for selecting sponsors and protégés. In some instances protégés and sponsors may self-identify while in others they may be selected or nominated by a committee.

To view the recording of this webinar, click here.
To view the slides of this webinar, click here.

JOIN US IN THE CITY BY THE BAY!

Don't miss your chance to attend the 2015 PDC Summer Conference in San Francisco.

July 9-11, 2015 • San Francisco Marriott Uninon Square
480 Sutter Street, San Francisco, CA 94108

We are looking forward to a great conference this year with an outstanding lineup of educational sessions and networking opportunities. Read on to learn more about this year's conference schedule and to hear from some of our members about their own experiences at the Summer Conference. For complete information, visit our Summer Conference Web Page.

SCHEDULE AT A GLANCE

Thursday, July 9, 2015

- First Time Attendee and New Member Welcome Event
- Keynote Presentation
- Networking Welcome Event
- Concurrent Sessions
- PDC Talks
- The PDC Development Fair
- Welcome Reception
- Small Group Dinners

Friday, July 10, 2015

- Plenary Session
- Roundtable Programs
- 25th Anniversary Luncheon
- Concurrent Sessions
- PDC Talks
- The PDC Development Fair – Part 2
- Reception and Large Group Dinner

Saturday, July 11, 2015

- PDC Annual Business Meeting
- Concurrent Sessions

PDC LARGE GROUP DINNER

Join your PDC colleagues for a reception and dinner Friday, July 10, 2015 starting at 6pm at San Francisco's E&O Kitchen and Bar. Located only a short walk from the hotel, the E&O Kitchen and Bar is an Asian Fusion restaurant offering modern Asian cuisine. Pre-registration is required, and the cost of this event is $100 per person.

Click here to register.

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Click here to Register for the PDC Summer Conference!