

The Certified Legal Manager (CLM)[®] Approved Provider Program

Presented by
Kathryn Vidal, CLM, SHRM-CP
and Karie Rivkin, CLM

Poll #1



Do you know that to award CLM credits, your chapter must be an Approved Provider?

A. Yes, that's why I attended today!

B. No, not until today.

Go Local – Award CLM credits!

- Attract and retain members - Chapter members can obtain CLM credits to take the exam and recertification locally.
- Chapter Visibility – Be seen as a local legal industry leader by other chapters, independents, attorneys, or other legal industry organization members.
- Add more credibility to your already amazing educational programs with approved CLM sessions.
- Market your education opportunities using the CLM Approved Provider seal
- Be included in a list of approved providers on the ALA website
- Designated contact person can provide consistent and intentional planning
- No cost!

How many ALA chapters are currently qualified for the CLM Approved Provider Program?

- A. Less than 20
- B. 21-50
- C. 51 or more

It's Easy Breezy!

STEP 01

COMPLETE APPLICATION

Each organization must complete the online application.

STEP 02

PROVISIONAL APPROVAL

Notifications will be sent via email to designated contact on application.

STEP 03

OFFICIAL APPROVAL

Provider must complete training before obtaining approval.

ALA CHAPTER APPLICATION

Link to CLM Credit Approved Provider Application
https://www.alanet.org/docs/default-source/certification/2020-02-clm-approved-provider-guide.pdf?sfvrsn=736a23ab_2



Approved Provider Application and Renewal

Please review the [Program Guide](#) before starting this application. Then complete this application and submit for approval.

Section 1: Applicant Information- Primary Planner is responsible for the application contact and the primary contact throughout the review process.

Section 2: Eligibility: Organizations must meet and agree to all eligibility requirements before proceeding with the application.

Direct any questions to certification@alonet.org or call 847.267.1252.

SECTION 1: APPLICANT INFORMATION

* ALA CHAPTER

CHAPTER WEBSITE

* PRIMARY CONTACT

* Email

* PHONE NUMBER

* CHAPTER PRESIDENT NAME

* CHAPTER PRESIDENT'S EMAIL ADDRESS

Select a choice

- 1-24 education sessions
- 25+ education sessions
- Other...

SECTION 2: ELIGIBILITY REQUIREMENTS

We said easy and we mean it:

- **ALA Chapter Name and Website**
- **Primary contact's name, email address, phone number**
- **Chapter President's Name and Email Address**
- **Number of sessions: 1-24, 25+, or other**

SECTION 2: ELIGIBILITY REQUIREMENTS

Please review and check the box below to agree:

The approved organization must designate one primary contact with authority to assure compliance with the CLM Accreditation Program criteria in the provision of continuing education that awards contact hours.

The primary contact named in Section 1 accepts responsibility to serve as the primary contact for the ALA Chapter and ensure compliance with the CLM accreditation criteria.

The primary contact is responsible for the orientation of all education planning personnel in the organization to the current CLM accreditation criteria.

The Approved Provider must ensure that each CLM activity must be intended and designed to maintain or increase the professional competence of legal managers. The program must be an organized continuing education experience under responsible sponsorship capable direction and qualified instruction

The Approved Provider must be administratively and operationally responsible for coordinating the entire process of planning, implementing, awarding contact hours, and evaluating for all CLM continuing education activities in the organization when contact hours are awarded.


The Approved Provider must not approve social activities, business meetings (Chapter or other) roundtable discussions, idea exchanges, business partner or consultant presentations intended to sell a product or service, or intended for any other purpose other than educational instruction.

The Approved Provider must agree to use the "CLM Approved Provider" logo and formal approval language on all print and digital marketing material regarding education sessions

The Approved Provider must agree not to alter the "CLM Approved Provider" Logo in any way.

The Approved Provider must provide each attendee with an evaluation form of the activity.

The Approved Provider (ALA Chapter) must agree to add each session to the Chapter Education Database



New code
Please type the code above

SUBMIT

- **Read Statements**
- **Check Agree**
- **Enter Code**
- **Click Submit**

What is provisional approval?

The time between the notification (e-mail) of provisional approval to the designated contact person and the successful completion of training by the contact person.

1. Submit
2. Provisional Approval
3. Training
4. Approval

TRAINING

Time
Difficulty
Renewal



What
now?

A large, red, circular stamp is centered on the page. The word "APPROVED" is written in a bold, red, sans-serif font across the center of the stamp. The stamp has a double-line border, with the inner line being a dotted pattern. Two horizontal lines cross the stamp, one above and one below the word "APPROVED".

APPROVED



[This Photo](#) by Unknown Author is licensed under [CC BY-SA](#)

Educational Sessions MUST:

- maintain or increase the professional competence of legal managers
- be organized, under responsible sponsorship, capable direction, and qualified instructor



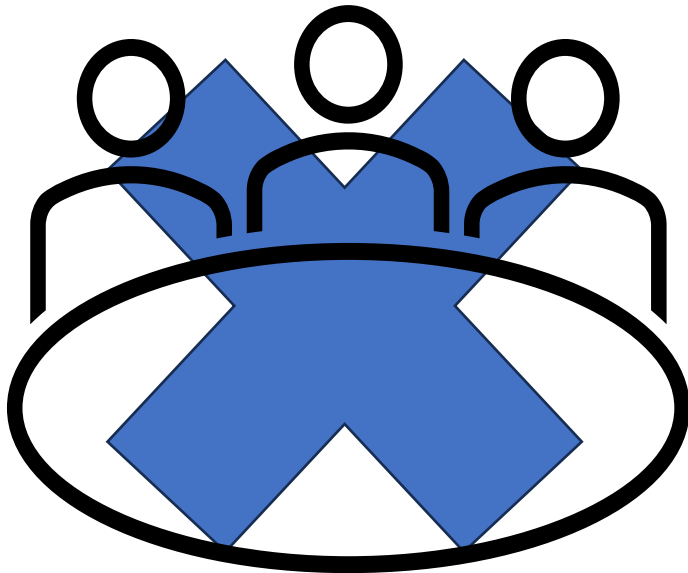
Awarding Credits



MUST BE AT LEAST ONE (1) HOUR
IN LENGTH, NO MORE THAN 10
MINUTES OF INTRODUCTIONS,
BREAKS, OR OTHER NON-
INSTRUCTIONAL ACTIVITY



PROGRAM MUST HAVE A COURSE
DESCRIPTION THAT INCLUDES
LEARNING OBJECTIVES



Not eligible for CLM credit:

- Business and chapter meetings
- Social activities
- Roundtable discussions or idea exchanges
- Product-specific presentations intended to promote a product or service

Knowledge Areas



Financial Management



Operations



Human Resources



Legal Industry

What are KSAs and why are they important to the Approved Provider Program?

Knowledge Skills & Abilities (KSAs) of a Legal Management Professional

The most recent Knowledge Skills & Abilities Study identified 65 competencies in 4 Knowledge Areas in a legal administrator job

CLM Credentialing is based on:

1. Knowledge areas associated with legal professionals and in the industry
2. Knowledge, skills, and abilities (KSAs) of the legal management professional and testing and recertification requirements

CLM Education Requirements

All applicants: at least 2 hours of coursework in each of 5 Management Skills categories:

Writing, Communication, Self-Management, Information Technology, and Organizational Development

Functional specialists: 15 hours of additional coursework in areas other than the field in which the specialist is employed:

Finance Management, HR Management, Operations Management (includes IT), and Business Management /Legal Industry

Visit <https://www.alanet.org/education/credentialing/application-requirements> for specifics



SESSION TITLE: Office Processes

SESSION DESCRIPTION:

Exchange ideas and fresh perspectives with your peers on the following topics:

- Stress-Free A/R Collection Calls
- Tracking and Counseling for Billable Hours Goals
- Managed Services – Ins and Outs of Outsourced Staffing
- Records Best Practices (Closing Files, Storage, Digital File)
- Client Conflict Systems & Procedures

NO

WHY?

No clearly identifiable learning objectives and no presenter/instructor with proven expertise in the field to facilitate and guide the session.

If this were changed to a panel discussion with stated objectives and an expert guiding the discussion, it may qualify for CLM credit.

Session Title: Advanced Strategies to Combat Rising Health Plan Costs

Session Description: This session will include information about cost drivers affecting employers' health plan costs and solutions employers can implement to control or reduce them. We will discuss opportunities to increase transparency in your plan costs, drive better utilization from your membership, ensure your plan is not overpaying for services/coverage, and examine some more progressive approaches.

Objectives:

1. Review of cost drivers you should be monitoring in your health plan
2. Overview of strategies in the employee benefit plan marketplace and their pros and cons
3. How to develop your own 3 - 5-year plan to keep costs under control

YES

APPROVAL LANGUAGE:

CLM[®] App Credit: 1 hour in the subject area of Human Resources (HR) toward the additional hours required for the CLM application. **CLM[®] Recertification Credit:** 1 hour in the subject area of Human Resources (HR)

WHY THIS SESSION IS TRICKY:

This session covers the health care costs and involves some financial analysis, however, the overall objectives focus on employee benefits.

SESSION TITLE: Use an Effective Budgeting Strategy to Drive your IT Roadmap

SESSION DESCRIPTION:

Yes, it's that time of year again and it's time for firms to begin compiling their budget requests for the new year. Many firms find the budgeting process daunting when it comes to IT. Come to this session to see the current trends in where IT budget dollars are being allocated at small to medium sized law firms.

Learning Objectives:

- Determine if IT budget dollars are being allocated correctly in your firm.
- Analyze the IT needs of your firm.
- Eliminate unnecessary spending and reallocate IT spending to more impactful projects.

YES

APPROVAL LANGUAGE:

CLM[®] App Credit for Functional Specialists: 1 hour in the subject area of Financial Management (FM) toward the additional hours required of some Functional Specialists to fulfill the CLM application requirement

CLM[®] Recertification Credit: 1 hour in the subject area of Financial Management (FM)

IT's TRICKY:

This session covers the budget process for IT spending. Initially, it may appear that the session would be OM, but because of the technology, it actually fits in with FM because it covers budgets and allocates funds correctly.

SESSION TITLE: Integrity's Indispensable Ingredient

SESSION DESCRIPTION:

Ethical lapses across the cultural landscape and the uncertainties of a post-9/11 world confirm that integrity is a timeless yet increasingly timely virtue. In this session we explore the crucial components of integrity and why it is of vital importance to today's workplace.

Learning Objectives:

- Understand that integrity is more than simply “being honest” and why all four of its components are necessary for a meaningful sphere of influence.
- Conclude that while an effective leader must have many admirable traits and skills, integrity is ultimately the indispensable ingredient.
- Focus ultimately on the two impactful byproducts of integrity that will keep one vigilant and grounded—even when the going gets tough.

Yes, but a little tricky

APPROVAL LANGUAGE: CLM[®] Application Credit: 1 hour in the category of Organizational Development

CLM[®] Recertification Credit: 1 hour in the subject area of Communications & Organizational Management (CM). This session also satisfies the 1 hour in Ethics requirement

WHY THIS SESSION IS TRICKY:

This session is CM because it covers leadership traits and skills. It also qualifies for CLM Application credit in Organizational Development because of the leadership skills component. Since integrity is the main focus of the presentation, it could be used to complete the 1-hour Ethics requirement for recertification.



Contacts and Links:

[Approved Provider Program](#)

[Certification Committee](#)

Certification@ALAnet.org

[Knowledge Skills and Abilities \(KSAs\)](#)



Kathryn and Karie thank you for attending the session and for considering becoming an Approved Provider!