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**PRESIDENTS' AWARD OF EXCELLENCE**

**“Roadmap to Success”**

***Recognizing chapter activities from January 1, 2018-February 28, 2019***

***The Presidents’ Award of Excellence, named in honor of ALA Past Presidents, recognizes chapters for their efforts in effective chapter leadership and establishes both mandatory and recommended annual chapter performance standards.***

ALA is the undisputed leader for the business of law, focused on the delivery of cutting-edge management and leadership products and services to the global legal community. We identify and provide solutions to the most strategic and operational challenges our members and customers face today, while we prepare them for the opportunities and challenges of tomorrow.

The Presidents’ Award of Excellence is a chapter performance guideline to encourage chapters to take effective and collaborative action in support of ALA’s mission to promote and enhance the competence and professionalism of legal administrators and all members of the legal management team; improve the quality of management in law firms and other legal service organizations; and represent professional legal management and managers to the legal community and to the community at large.

A member of the Regional Leadership Team (usually the focus chapter liaison) will meet with the incoming or new Chapter President (and potentially other chapter leaders) to review these performance objectives and to help the chapter set goals for the year. This will be accomplished either in person or over the phone. Throughout the year, the Regional Leadership Team and ALA’s professional staff are available to assist chapters in achieving these objectives.

It is hoped that ALA chapters will meet and exceed these performance objectives. As an incentive to recognize chapter success and continued innovative growth, we ask each chapter to strive to achieve the Presidents’ Award of Excellence. The guidelines that follow include items that are mandatory, while others are recommended and strongly encouraged.

Use the following checklist to chart your progress and highlight your chapter successes! Initiatives should be completed within a 14-month period prior to the Award submission date. Members of your Regional Leadership Team and ALA Headquarters Staff are available to help at any time.

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| **√** | **Required or Recommended** | **Description** | **Individual Responsible** |
| [ ]  | Required | Provide chapter members with a calendar of major chapter and Association events. This can be achieved by sending a regular newsletter or email blast or by publishing dates on chapter website. |  |
| [ ]  | Required | Create educational programs in **at least three** of the five educational areas of knowledge as identified by the ALA Knowledge, Skills and Abilities (KSA) Survey. These include: (1) Communication and Organizational Management, (2) Financial Management, (3) Human Resources Management, (4) Legal Industry/Business Management, and (5) Operations Management. |  |
| [ ]  | Required | Create awareness among members and the legal community at large of [ALA's Mission Statement](http://www.alanet.org/about/about-ala), [Code of Professional Responsibility](http://www.alanet.org/docs/default-source/default-document-library/ethics.pdf?sfvrsn=0), and [strategic plan](http://www.alanet.org/about/about-ala/ala-strategic-plan). Develop and maintain communication methods to announce and promote all levels of ALA activities and events. Such methods may include announcements at chapter meetings, newsletters, websites, event calendars and/or other communications provided to members on a regular basis. See [ALA's Downloadable Web and Print Ads](http://www.alanet.org/membership/chapters/chapter-leader-resources/promotional-resources#publicity kits) for ready to use ads. |  |
| [ ]  | Required | Take specific action to advance and support diversity and inclusion in the Association, in the legal management community and in all legal service organizations through educational opportunities, activities, and initiatives.  |  |
| [ ]  | Highly recommended | Enhance the visibility of members, the legal management profession, and ALA through activities such as community service projects and/or alliances with bar associations and other law-related professional associations. Participate in [ALA’s Community Connection initiative](http://www.alanet.org/about/about-ala/community-connection).  |  |
| [ ]  | Highly recommended | The chapter makes full use of [ALA’s Diversity & Inclusion Scorecard – A Roadmap to Change for Chapter Leaders](http://www.alanet.org/about/diversity/scorecard-for-ala-chapter-leaders) and encourages chapter members to utilize the [Scorecard for Law Office Administrators](http://www.alanet.org/about/diversity/scorecard-for-law-office-administrators). |  |
| [ ]  | Highly recommended | Reinforce ALA’s position as the thought-leader within the legal management industry by promoting readership of [*Legal Management* digital magazine](http://www.alanet.org/education/publications/legal-management-magazine-november-december), including monthly distribution of current articles or relevant features.  |  |
| [ ]  | Highly recommended | Regularly recognize achievements and/or contributions by members, volunteers, business partners and the like. Such recognition could be made part of the chapter’s website or newsletter, a chapter meeting, social media postings or business partner events.  |  |
| [ ]  | Highly recommended | Actively promote and educate members about [ALA’s Certified Legal Management (CLM) SM program](http://www.alanet.org/education/certification). This could be achieved by recognizing CLMs at chapter events, advertising the benefits of the program with the local bar association and/or including a CLM focused presentation as part of the chapter’s annual educational programing.  |  |
| [ ]  | Highly recommended | Maintain the chapter’s website with current news and upcoming events. If the chapter does not currently have a website, create a plan to launch one. |  |
| [ ]  | Recommended | Promote and/or create awareness of the articles and resources available in [ALA’s Career Center](http://www.alanet.org/career-center/career-resources-and-articles). |  |
| [ ]  | Recommended | Maintain the chapter’s social media accounts with current news and upcoming events. If the chapter does not have a social media presence, create a plan to establish one.  |  |
| [ ]  | Recommended | Develop a written plan with measurable goals and objectives to increase membership and attendance at meetings and events. |  |
| [ ]  | Recommended | Promote and/or create awareness of the ALA online communities. |  |
| [ ]  | Recommended | Educate members on the importance of sustainability (“green initiatives”). This could be achieved by hosting an educational session, publishing an article in the chapter’s newsletter, or posting information on the chapter’s website.  |  |
| [ ]  | Recommended | Reinforce ALA’s position as the thought-leader within the legal management industry. Make presentations on law firm management at law schools and/or bar associations or by authoring original articles for inclusion in a law school or bar association publication.  |  |

**Responsibilities to Chapter Members: \_\_\_\_\_ Required (4) \_\_\_\_\_ Highly Recommended (6) \_\_\_\_\_ Recommended (6)**

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| **√** | **Required or Recommended** | **Description** | **Individual Responsible** |
| [ ]  | Required | Meet with your assigned Regional Leadership Team focus chapter liaison (or someone else from ALA leadership) to go over the Presidents’ Award of Excellence checklist. These meetings are encouraged as part of a chapter visit or other in person meeting, such as at Chapter Leadership Institute or ALA’s Annual Conference; however, they can be done by phone.  |  |
| [ ]  | Required | Adhere to and abide by the chapter’s own bylaws. In addition, the chapter shall seek and obtain approval by ALA headquarters of proposed amendments to chapter bylaws prior to any vote by members on proposed amendments. |  |
| [ ]  | Required | Create a workable structure to maximize chapter efficiency by taking into consideration leadership succession, chapter strategic planning, and the interests and expertise of members. Install officers annually (April preferred) to facilitate effective leadership training opportunities offered by ALA. |  |
| [ ]  | Required | Ensure the chapter is incorporated. Obtain tax exempt status and annually file tax returns, where appropriate and as indicated by pertinent regulatory bodies. Maintain procedures for ensuring that annual filings and renewals are made with appropriate agencies. (International chapters should take comparable measures in accordance with local requirements.) |  |
| [ ]  | Required | Protect personal assets of members by taking appropriate safeguards, which may include securing and maintaining insurance coverage, fiduciary bonds and chapter incorporation. |  |
| [ ]  | Required | Ensure that the chapter's treasury is not commingled with employer or personal funds and that the chapter maintains appropriate internal controls to ensure financial security. Maintain procedures for annual audit or detailed review of books, accounts and records by chapter officers (other than by the chapter treasurer or other officer with primary financial responsibilities) and/or by outside, independent auditors. |  |
| [ ]  | Required | Create and maintain awareness of antitrust/competition issues, such as those published in [ALA's Antitrust Guide](http://www.alanet.org/docs/default-source/default-document-library/antitrust-guide.pdf?sfvrsn=0).  |  |
| [ ]  | Required | Promote participation in ALA’s Compensation and Benefits Survey. Or, if the chapter produces its own survey, obtain approval by ALA headquarters prior to dissemination of any compensation/economic survey questionnaires. |  |
| [ ]  | Highly recommended | Maintain a continuous retention and recruitment effort to create a diverse chapter membership from all cross-sections of the legal management community, with the following goals in mind:a. retention rate goal exceeding 80% (industry average for individual associations).b. total membership equal to or greater than its membership total on December 31 of the previous year. Headquarters will develop and share the 2018 recruitment and retention chart in early January 2019. |  |
| [ ]  | Highly recommended | On annual basis, survey members to determine what issues they are facing in their jobs as well as their satisfaction with chapter benefits and activities.  |  |
| [ ]  | Highly recommended | On regular basis (at least annually), conduct a “benefits of membership” session for new and prospective members and invite existing members who may want a “refresher.” Highlight benefits for all levels of the Association (chapter/region/international) and the value of our business partner relationships. This can be part of Regional Leadership Team chapter visit.  |  |
| [ ]  | Highly recommended | Create and/or maintain a mentor or “buddy” program for new members. |  |
| [ ]  | Highly recommended | Maintain regular communication with the chapter’s assigned Regional Leadership Team focus chapter liaison. |  |
| [ ]  | Highly recommended | Create measurable plans and opportunities to promote aspects of membership to appeal to current and prospective members across all generations, focused on developing long-term leadership and involvement. |  |
| [ ]  | Recommended | Create and/or maintain a program to keep seasoned administrators, including Past Presidents, actively involved in chapter activities. |  |
| [ ]  | Recommended | Provide educational enrichment within the community through activities such as internship programs, advisory panels, curriculum development efforts or teaching. |  |
| [ ]  | Recommended | Conduct a joint event or initiative with another professional organization (see ALA’s listing of [Strategic Alliance Partners](http://www.alanet.org/docs/default-source/chapter-resources/strategic-alliance-partner-chapters.pdf?sfvrsn=4)). Submit [Strategic Alliance Profile Form](https://alanet.wufoo.com/forms/strategic-alliance-profile-form/). |  |
| [ ]  | Recommended | Assist ALA headquarters with recruitment efforts by regularly providing them with names and contact information for prospective members. |  |
| [ ]  | Recommended | Provide [IDEA Award](http://www.alanet.org/about/about-ala/member-recognition/idea-awards-criteria-and-guidelines) information to chapter members and business partners. Encourage chapter, firm, group and/or individuals to apply. |  |

**Responsibilities to Chapter Management: \_\_\_\_\_ Required (8) \_\_\_\_\_ Highly Recommended (6) \_\_\_\_\_ Recommended (5)**

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| **√** | **Required or Recommended** | **Description** | **Individual Responsible** |
| [ ]  | Required | Develop and implement procedures and policies that facilitate business partner involvement in chapter-selected activities. Examples include: business partner appreciation events; public acknowledgement for financial or “in kind” support; business partners permitted to attend an entire meeting they sponsor; business partners encouraged to participate in special projects (e.g., Community Connections) or social events; business partners invited to serve on a business partner advisory panel. |  |
| [ ]  | Required | Actively promote and educate members of benefits delivered directly with ALA membership, specifically promoting two times a year the exclusive ALA member savings found within the [VIP Program](http://www.alanet.org/about/vip-program).  |  |
| [ ]  | Required | Support the engagement and growth of the international membership by not scheduling any chapter conference, event, or expo thirty (30) days prior to or following the ALA Annual Conference & Expo and the Regional Legal Management Conferences. *(NOTE:* [*This policy*](http://www.alanet.org/membership/chapters/chapter-leader-resources/policies-guidelines-and-legal-opinions#window) *was reinstated as a formal policy beginning 1/1/2017).* |  |
| [ ]  | Highly recommended | Publish at least one article per year in the chapter newsletter or on the chapter website to educate members about the importance and value of business partners. The article should contain at least two testimonials — one from the member perspective and one from the business partner perspective — about the value or success in working together.  |  |
| [ ]  | Highly recommended | Subscribe to and participate in [ALA’s Business Partner Listserv](http://www.alanet.org/membership/chapters/chapter-leader-resources/chapter-business-partner-relations-resources/ala-bp-listserv).  |  |
| [ ]  | Highly recommended | Encourage members to use the [Legal Marketplace](http://legalmarketplace.alanet.org/) program. |  |
| [ ]  | Recommended | Inform business partners about regional and ALA opportunities by providing them with a link to [ALA’s Business Partner Center](http://www.alanet.org/marketing-opportunities/marketing-opportunities-overview). |  |
| **[ ]**  | Recommended | On annual basis, submit an updated [Chapter Business Partner Program profile](https://alanet.wufoo.com/forms/chapter-business-partner-relations-program-profile/).  |  |
| **[ ]**  | Recommended | Assist ALA headquarters with growing business partner relationships by regularly providing names and contact information for relevant business partner prospects. Send details to *marketing@alanet.org*.  |  |

**Responsibilities to Business Partners: \_\_\_\_\_ Required (3) \_\_\_\_\_ Highly Recommended (3) \_\_\_\_\_ Recommended (3)**

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| **√** | **Required or Recommended** | **Description** | **Individual Responsible** |
| [ ]  | Required | Provide ALA headquarters with a [list of individuals](http://www.alanet.org/membership/chapters/chapter-leader-resources/chapter-forms) who will assume chapter office as soon after election as practicable and before installation occurs. Provide ALA with current digital photo of Chapter President.  |  |
| [ ]  | Required | The chapter president shall update and return the Chapter Profile Form on an annual basis. Semiannually, chapters will review, reconcile and return chapter membership rosters to ALA headquarters. |  |
| [ ]  | Required | Ensure that all chapter members are also members of ALA at all times. On an annual basis, the chapter president will submit a timely statement certifying compliance with this ALA bylaw provision. |  |
| [ ]  | Required | Provide copies of board and chapter meeting minutes to chapter members. |  |
| [ ]  | Required | Use the ALA logo and other Association symbols pursuant to the [Brand Identity Guidelines](http://www.alanet.org/docs/default-source/default-document-library/identitystandards.pdf?sfvrsn=0) provided by ALA headquarters. |  |
| [ ]  | Required | For those chapters that maintain a chapter website, ensure a link to [www.alanet.org](http://www.alanet.org) is included on the home page of the chapter site. |  |
| [ ]  | Required | Ensure all chapter board members are subscribed to and participate in [ALA’s Chapter Leaders Community](http://community.alanet.org/p/co/ly/gid%3D158).  |  |
| [ ]  | Highly recommended | Ensure that one or more chapter board members (or other designated individual/s) attend the Chapter Leadership Institute annually. The President-Elect is encouraged to attend. Limited financial assistance is available for those chapters that demonstrate need. Contact chapters@alanet.org for further information related to financial assistance.  |  |
| [ ]  | Highly recommended | Actively promote and educate members about ALA’s Annual Conference & Expo, Regional Legal Management Conferences, and specialized conferences and other educational opportunities, such as [webinars](http://www.alanet.org/education/online-learning/webinars). |  |
| [ ]  | Highly recommended | Ensure that a Regional Council Representative (or other designated individual/s) attends Regional Council Meetings held in conjunction with ALA’s Annual Conference and Regional Conference. The Regional Council Representative (or other designated member) shall provide reports of each meeting to chapter members. |  |
| [ ]  | Highly recommended | Regularly provide chapter activity reports and photos to ALA headquarters, for inclusion in various ALA publications. Submit details to *chapters@alanet.org**.*  |  |
| [ ]  | HighlyRecommended | Enter at least one educational program summary and evaluation into [ALA’s Chapter Education Database](http://my.alanet.org/chapter-education-database/chapteradmin/). Preference is to provide submissions for all quality education programs, especially when an outside speaker is used. Use [evaluation forms and summary forms](https://www.alanet.org/membership/chapters/chapter-leader-resources/chapter-education) to compile data. |  |
| [ ]  | Highly recommended | Upload chapter newsletters, news blasts, and chapter meeting minutes to the [chapter’s online community](http://community.alanet.org/p/co/in/faid%3D7) regularly (bi-monthly preferred).  |  |
| [ ]  | Highly recommended | Actively promote the social media postings of the international Association by liking, sharing, retweeting and/or reposting from chapter accounts. |  |
| [ ]  | Recommended | Make a monetary donation to [the Foundation](https://www.alanet.org/about/about-ala/foundation) or donate an item to the Silent Auction for the Annual Conference.  |  |

**Responsibilities to the Association: \_\_\_\_\_ Required (7) \_\_\_\_\_ Highly Recommended (7) \_\_\_\_\_ Recommended (1)**

Responsibilities to Chapter Members: \_\_\_\_\_ Required (4) \_\_\_\_\_ Highly Recommended (6) \_\_\_\_\_ Recommended (6)

Responsibilities to Chapter Mgmt: \_\_\_\_\_ Required (8) \_\_\_\_\_ Highly Recommended (6) \_\_\_\_\_ Recommended (5)

Responsibilities to Business Partners: \_\_\_\_\_ Required (3) \_\_\_\_\_ Highly Recommended (3) \_\_\_\_\_ Recommended (3)

Responsibilities to the Association: \_\_\_\_\_ Required (7) \_\_\_\_\_ Highly Recommended (7) \_\_\_\_\_ Recommended (1)

TOTAL: \_\_\_\_\_ Required (22) \_\_\_\_\_ Highly Recommended (22) \_\_\_\_\_ Recommended (15)

**REQUIREMENTS FOR PRESIDENTS’ AWARD OF EXCELLENCE:**

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| Required categories\*  | 22 out of 22 |
| Highly Recommended categories | 16 out of 22 |
| Recommended categories  | 7 out of 15 |

\*These items are required for attaining the Presidents’ Award of Excellence recognition

As the Chapter President, I affirm the information above is true and accurate to the best of my knowledge. I understand ALA reserves the right to verify the accuracy of the information submitted.

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Chapter Name Chapter President’s Name (please print)

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Chapter President’s Signature Email Address

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Telephone Number Date

Completed entry forms must be submitted to awards@alanet.org on or before February 28, 2019.