



2016 CERTIFICATION PROGRAM

Information and Application Packet

Your connection
to knowledge, resources and networking



Association of Legal Administrators (ALA) was formed in 1971 to provide support to those professionals involved in the management of law firms, corporate legal departments and government legal agencies. The Associations' members, representing employers in 30 countries, are administrators who direct important areas of law office management including human resources, finance, technology, facilities and marketing.

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About the Certified Legal Manager Program

The Association of Legal Administrators (ALA) is the credentialing body of the Certified Legal Manager (CLM)^{SM*} Program.

Purpose of Certification

The CLM program allows a qualified legal administrator to demonstrate, through experience and coursework culminating in the examination process, a mastery of core areas of the body of knowledge identified as essential to the effective performance of a principal legal administrator. Legal administration professionals must deal effectively with financial management and accounting, human resources management and development, office services management, information systems management, and trends in the legal industry. By completing the CLM process and attaining CLM certification, the legal professional will have demonstrated proficiency in these core areas.

International Applicants

Legal administrators in Canada and other countries are eligible to apply to take the Certification exam. They must realize, however, that major portions of the examination are based on U.S. federal law.

Examination Centers

ALA holds CLM exams twice a year: once in the Spring, and once in the Fall. ALA's CLM exam is offered online at Pearson VUE's many testing sites throughout the U.S. For more information, see alanet.org/clm/nowonline.aspx

All approved CLM applicants will receive a unique password and URL to register at one of Pearson's testing locations.

Applicants are encouraged to apply early in order to secure their preferred exam location.

Application Submissions

1. Applications may be submitted online at alanet.org/clm/submit.aspx, emailed to certification@alanet.org or mailed to the
CLM Certification Center
Association of Legal Administrators
8700 W. Bryn Mawr Avenue, Ste. 110S
Chicago, IL 60631-3512
(See pg. 7 for complete information.)

2. Applications must be submitted or postmarked by the application deadline.

Application Review and Notification Process

1. Applications will be thoroughly reviewed at the CLM Certification Center to ensure that the applicant is eligible to take the examination.
2. Approved applicants will receive email notification of acceptance of their application, and information on registering for the exam at a Pearson VUE testing center.
3. Please keep a copy of your application materials.

Exam Dates	Application Deadlines
May 2, 2016	March 2, 2016
November 4, 2016	September 1, 2016

Apply early to secure your preferred exam location.

"Regardless of the results, the CLM process is one that can benefit everyone. Is it hard work? Yes. It is a challenge? You bet. A commitment? For sure. Worthwhile? Without a doubt!"

Michael Steiner, CLM
Executive Director
 Klinedinst, PC
 San Diego, CA

Step 1: Fulfill the Application Requirements

Employment and Experience Requirements

All applicants must meet the following employment and experience criteria:

- I. **Applicants must fall under one of the two following categories:**
 - A. Applicants who are Principal Administrators**
(See *Job Description 1* on page 9.)
Must have three (3) full-time years of experience as a principal administrator or a branch office manager of a law firm or legal department in an exempt level position.
 - B. Applicants who are Functional Specialists**
(See *Job Descriptions 2 through 7* on page 9.)
Must have three (3) full-time years of experience in a supervisory position as an exempt level specialist in a law firm or legal department in any of the functional areas. A supervisory position is one in which the candidate has primary responsibility for employee selection and termination, evaluation, salary determination and assignment of work.
- II. **All applicants must provide evidence of having completed, within the 24 months preceding the date of application, at least 10 hours of coursework as described for all applicants. Functional Specialists must provide evidence of having completed, within 24 months preceding the date of application, an additional 15 hours of coursework distributed in areas other than the field in which the Functional Specialist is primarily employed.** (See page 5 for full details.)
- III. **All applicants shall affirm that they endorse the ALA Code of Professional Responsibility.** (See page 11.)
- IV. **All applicants must be currently involved in the full-time work of managing a legal organization, such as a private law firm, legal clinic, government agency, corporate legal department or court system, or have been working in such full-time employment within 24 months of the date of application.**

Education Requirements for ALL Applicants

All applicants must complete, within 24 months preceding the date of application, at least 120 minutes of coursework in each of five (5) Management Skill Categories below. Coursework may be completed in any of the competencies or combination of competencies that comprise the category. A maximum of four (4) hours can be obtained in an interactive, technology-based self-study program. (See descriptions on page 6.)

Management Categories:

- **Writing Skills**

To meet the criteria of Writing Skills, it must show how to write effectively, clearly and concisely. It can include Grammar Skills, writing Memos, Emails, Policy Manuals, Proposals, etc. Writing Skills also includes education that provides vital information to creating technical documents as Employee Handbooks, RFPs and Job Descriptions.

- **Communication Skills**

To meet the criteria of Communication Skills, it must cover communication skills, either verbal or nonverbal, such as effective, clear and concise Oral Presentations to staff and lawyers, Interpersonal and Interaction Skills, Performance Counseling Skills, Body Language Skills, Listening Skills, etc.

- **Self-Management Skills**

To meet the criteria of Self-Management Skills, it must cover how to acquire and/or improve a particular skill that manages one's self and ultimately one's job, such as Time Management, Stress Management, (Simple) Project Management, Priority Management, Memory Skills, Problem-Solving, Producing Plans & Schedules, Self-Motivation Skills, Resilience-Building, Boundary-Setting, etc.

- **Information Technology**

To meet the criteria of Information Technology Skills, it must cover the "how to" aspect of information technology. Information Technology includes the features and capabilities of computer Network Hardware and Software Systems, including Practice Support Systems, Document Assembly and Management Systems, training in the use of Computer Systems, such as Word processing, and accessing informational Databases, etc. It also includes important features such as the ethical and security aspects, necessary for rolling out, for example, an extranet.

- **Organizational Development**

To meet the criteria of Organizational Development Skills, it must focus on developing effective management and leadership skills that lead people, departments and organizations, such as Leadership styles and techniques, Team development, Management principles, and organizational development techniques such as Change Management Skills, Coaching Skills, Negotiation Skills, Culture Management techniques, Conflict Management techniques, etc.

NOTE: Functional Specialists also need an additional 15 hours of coursework. (See description below)

Education Requirements for Functional Specialists

- Applicants who are Functional Specialists (see *Job Descriptions 2-7 on page 9*) must complete the 10 hours of educational coursework as prescribed for ALL applicants (see page 4.)
- Functional Specialists must also complete, within the 24 months preceding the date of application, **an additional 15 hours of educational coursework** distributed in areas other than the field in which the Functional Specialist is primarily employed.
- These areas include financial management, human resources management, legal industry/business management, and operations management (*which includes technology management*). (For a complete listing of subject areas, see *Content Outline of the Body of Knowledge* on pages 12-13.)
- **Of these 15 hours of coursework, a maximum of six (6) hours can be obtained in an interactive, technology-based self-study program. These self-study hours are in addition to the four (4) hours that may be used to fulfill the educational requirements for all applicants.** (See *Self-Study Criteria* on page 6.)

Education Criteria

Please list the courses that you have taken which correspond to the Management Skill Categories on the education Worksheet, downloadable at alanet.org/clm/submit.aspx, or in a similar document.

Each course must meet the following criteria:

- All educational courses or sessions must be at least one (1) hour in length.
- Each 60 minutes of educational instruction can include no more than 10 minutes of introductory remarks, breaks or other non-instructional activity.
- These courses may include accredited college or university coursework, workshops, seminars, live webinars and conference programs offered by ALA or its Chapters; the American Bar Association; state and local bar associations; International Legal Technology Association; Legal Marketing Association; American Institute for Certified Public Accounts and state CPA associations; International Facilities Management Association; The Society for Human Resource Management; American Management Association; and other law-related associations and nationally recognized professional education providers.
- A maximum number of minutes can be obtained through interactive, technology-based self-study programs (see page 6 for complete information.)
- Acceptable programs of learning 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 program has a course description that includes specific educational objectives.

The following activities are not eligible for credit:

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 purpose other than educational instruction.

Self-Study Criteria

An interactive, technology-supported self-study program is defined as a program that uses interactive learning methodologies that monitor learning or participation in the course through the use of software or online technologies. All self-study training formats must allow participants to communicate with an instructor. Email or phone communication is allowed. Technology-supported self-study programs must include **all** of the following:

1. The program has a **course description** that includes **specific educational objectives**.
2. The program requires participant response to **questions that test for understanding** and provides feedback to participant responses indicating the response is correct or incorrect.

A certificate of successful completion from the provider of the program **must** be submitted for consideration of any interactive, technology-based self-study program.

Note that recorded webinars have separate requirements for approval as self-study programs.

“While the (CLM) achievement is amazing, what is more amazing and certainly more important is how more well-rounded I am as a legal administrator and manager as a result of the various study groups and education.”

Mark Bridgeman, CLM

Federal Records Officer
U.S. Attorney's Office
Northern District of Illinois
Chicago, Illinois

Webinar Criteria

1. **Live webinars** are considered as regular, live sessions (not self-study).
2. **Recorded, on-demand webinars** are considered **self-study eligible for CLM credit only when they include all of the following elements:**
 - Participants can contact the presenter to ask questions and they will receive a timely response.
 - Participation is monitored throughout the program using a system that requires periodic responses from the user.
 - Fast-forwarding is disabled.

What Does NOT Count for Self-Study

The following are examples of what does not count as interactive self-study:

1. Online programs that lack the interactive elements of the self-study criteria.
2. Listening to an audio program that lacks the interactive elements of the self-study criteria.
3. Watching a video that lacks the interactive elements of the self-study criteria.
4. Reading an article or book that lacks the interactive elements of the self-study criteria.

ALL APPLICANTS:

A maximum of 4 hours can be obtained through self-study programs.

FUNCTIONAL SPECIALISTS ONLY:

An additional 6 hours of self-study can be used toward fulfilling the extra 15 hours of education required of the Functional Specialist.

Step 2: Apply

Application Submission Options

There are two (2) options for application submissions. Please note, applications must be submitted or postmarked by the application deadline. **Applicants are strongly encouraged to apply early to secure their preferred exam location.**

1. Online

Applicants can submit their applications online. Applicants will be asked to complete their application online, pay their exam fee and submit their Education Worksheet (see alanet.org/clm/aspx.)

2. Mail

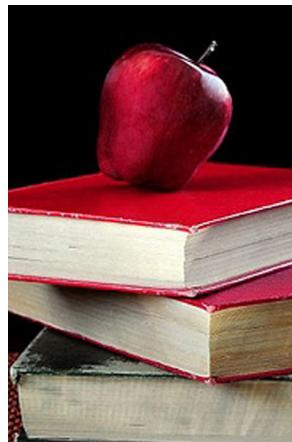
Applicants can submit their applications via mail if paying by check (see page 11).

“Having the certification gives me an advantage in the marketplace that is needed in these tough economic times. If you want to stand out from the crowd, take on the challenge of attaining certification and prove to yourself and others that you have what it takes to contribute to a firm’s success.”

Donald M. Anderson, CLM

Executive Director
Williams Montgomery & John, Ltd.
Chicago, Illinois

EXAM FEE	RETAKE FEE (see Policy page 18)	RESCHEDULE FEE (see Policy page 18)
\$529 (member)	\$259	\$159
\$629 (nonmember)	\$259	\$159



2016 Certified Legal Manager (CLM)SM Program Application Form



Please fill out the following pages of the application form or download the form at alanet.org/clm. Applications can be printed or typed. Be sure to sign the application and include exam payment with your mailing.

Last Name First Middle

Preferred Mailing Address for your CLM Exam Results

Business Phone () Fax ()

E-mail Home or Cell Phone ()

ALA Member Number

Employing Organization

Organization's Address (if different from Preferred Address)

Organization's General Phone

Please Select Exam Date:

Exam Dates	Application Deadlines
<input type="checkbox"/> May 2, 2016	March 2, 2016
<input type="checkbox"/> November 4, 2016	September 1, 2016

All applications must be submitted or postmarked by the application deadline. Applicants are encouraged to apply early to secure their preferred exam location.

Job Descriptions:

Please mark the description that applies to your most current job:

1. Principal Administrator/ Branch Office Manager

Responsible for overall management of activities, including principal elements or supervision of all of the following functional descriptions (2 through 7) and/or general management, including management of a majority of the following activities: policy making, strategic and tactical planning, business development, risk management, quality control, organizational development and other general management functions beyond mere attendance at management meetings.

2. Financial Management

Including management of a majority of the following activities: planning, forecasting, budgeting, variance analysis, financial reporting, operations analysis, general ledger accounting, rate determination, billing and collections, cash flow accounting, banking relationships, investment, tax planning, tax reporting, trust accounting, payroll, ERISA accounting and other financial management functions beyond mere recordkeeping.

3. Human Resources Management

Including management of a majority of the following activities for the legal, paralegal and support staff: recruiting, selection, placement, orientation, training and development, performance evaluation, salary administration, employee relations, motivation, counseling, disciplining, discharging, benefits administration, workers' compensation, personnel data systems, organizational analysis, job design, resource allocation and other human resource management functions beyond mere recordkeeping.

4. Systems Management

Including management of a majority of the following activities: systems analysis, operational audits, procedural handbooks, cost/benefit analysis, computer systems design, programming and systems development, information services, records management, library management, office automation, document construction systems, information storage and retrieval, telecommunications, litigation support, legal practice systems and other systems management functions beyond mere procedure manuals and computer program documentation.

5. Facilities Management

Including management of a majority of the following activities: space planning and design, office renovation, purchasing, inventory control, reprographics, records management, reception switchboard services, telecommunications, mail, messenger and other facilities management functions beyond mere purchase order processing.

6. Marketing Management

Including management of a majority of the following activities: participation in planning and developing firm, departmental and individual attorney marketing plans; collection and analysis of marketing research data; preparing and managing marketing budgets; developing and implementing marketing programs; coordinating marketing efforts among new departments and offices; and participation in developing strategies to identify, select and promote new services, offices and attorneys.

7. Practice Management

Including management of one or more of the following activities: lawyer recruiting, lawyer training and development, legal assistant supervision, practice development, work product quality control, substantive practice systems and other practice management or administration of any legal organization.

Candidates with Job Description 1 (Principal Administrators)

Candidates who are principal administrators (Job Description 1) must have three (3) years of experience as a Principal Administrator or a branch office manager of a law firm or law office in an exempt level position.

Dates of Employment in Your Current Position

Are you currently employed in this position?

Yes Starting Date: ____/____/____ Is this a full-time position Yes No

No End Date: ____/____/____

Employer: _____

If less than three years, list the dates of your previous employment as a Principal Administrator:

Starting Date: ____/____/____ Ending Date: ____/____/____

Was this a full-time position Yes No

Employer: _____

Candidates with Job Descriptions 2-7 (Functional Specialists)

Functional Specialists must have three (3) full-time years of experience in a supervisory position as an exempt specialist in a law firm or legal department in any of the functional areas. A supervisory position is one in which you have primary responsibility for employee selection and termination, evaluation, salary determination and assignment of work.

Dates of Employment in Your Current Position

Are you currently employed in this position?

Yes Starting Date: ____/____/____ Is this a full-time position Yes No

No End Date: ____/____/____

Number of employees you supervise(d): _____

Describe the positions you supervise(d):

Position title:

Date when you assumed supervisory responsibility for position:

____/____/____
____/____/____
____/____/____

If less than three years, list the dates of your previous employment as a Functional Specialist:

Starting Date: ____/____/____ Ending Date: ____/____/____

Was this a full-time position Yes No

Employer: _____

Number of employees you supervised: _____

Describe the positions you supervised (may use additional space):

Position title:

Date when you assumed supervisory responsibility for position:

____/____/____
____/____/____
____/____/____

ALA Code of Professional Responsibility

Please read and sign the Code.

As legal management professionals, members of ALA shall abide by high ethical standards. This ALA Code of Professional Responsibility sets forth standards for the administration of legal management practices. Legal administrators at all levels have a responsibility to uphold and incorporate these standards into their everyday performance. This Code applies to the administration of legal organizations including private firms, corporate legal departments, legal clinics, government agencies and courts.

I. Responsibilities to the Profession of Legal Management:

- A. Uphold the ALA Code of Professional Responsibility and the Mission of the Association of Legal Administrators;
- B. Conduct oneself with integrity and project a positive image of the legal management profession;
- C. Pursue continuing education to maintain a high level of proficiency in management procedures and issues;
- D. Promote initiatives for civic, economic and social well-being within our communities; and
- E. Advocate increased diversity in the legal management community and in all legal service organizations.

II. Responsibilities to the Legal Employer and Its Employees:

- A. Foster an environment that promotes the use and improvement of sound business practices where all employees can develop, contribute and prosper;
- B. Be truthful and forthright in all forms of professional and organizational communication;
- C. Report financial information promptly, completely and accurately, and in a manner that facilitates informed decision making;
- D. Implement policies and procedures to address professional responsibility, business ethics and conduct;
- E. Establish an appropriate grievance and appeals process tailored to the legal organization's size and structure; and
- F. Promote a work environment that does not discriminate, intimidate or allow harassment based on race, color, ethnicity, national origin, gender, age, religion, disability, veteran's status, marital status, sexual orientation or other legally protected characteristics.

III. Responsibilities to Those Outside the Legal Organization:

- A. Respect the customs and practices of clients, prospective clients, business partners and the community at large;
- B. Avoid actual or apparent conflicts of interest, and advise all appropriate parties of potential conflicts;
- C. Refrain from soliciting or accepting any fee, commission, gift, gratuity, discount or loan on behalf of oneself, family or friends that may influence business decisions;
- D. Ensure the existence of policies and procedures to provide quality client service;
- E. Utilize confidential and proprietary information solely for legal practice or management purposes and not to further private interest or personal profit; and
- F. Support outreach activities that cultivate pro bono assistance and law related public education to meet community needs.

I affirm that I endorse the goals of the Association of Legal Administrators Code of Professional Responsibility.

Signature

Date

I certify that the information provided in this application is accurate and complete to the best of my knowledge.

Signature

Date

After completing and signing this application, please send it with the exam fee (\$529 members, \$629 non-members) along with your Education Worksheet. All fees submitted with applications sent by mail must be paid by credit card or by personal or organizational check, money order or cashier's check payable to Association of Legal Administrators.

Indicate: Member # _____ Nonmember
 Check (Made Payable to Association of Legal Administrators)

Send to:

Association of Legal Administrators
 CLM Certification Center
 P.O. Box 95583
 Chicago, IL 60094-5583

Step 3: Study

Preparing for the Exam

The multiple-choice examination covers topics detailed in the *Content Outline of the Body of Knowledge*. The practice analysis upon which this outline is based was accomplished with the assistance of an independent testing contractor, the Human Resources Research Organization (HumRRO).

- While the CLM program has applicability to all those who are, or aspire to be, principal legal administrators, job requirement for principal administrators working in different environments are not exactly the same.
- The content of the CLM examination is targeted to an individual who is expected to have day-to-day, hands-on involvement in each of the Body of Knowledge areas listed.
- Persons passing the CLM examination should have the depth and breadth of knowledge and management skills that would enable him or her to visit any 30 to 50-attorney law office, review practices and procedures, and be conversant about, and offer advice in, each of the areas listed in the Body of Knowledge without relying on others.

Content Outline of the Body of Knowledge

The CLM Certification exam questions are representative of the functional areas below. The percentages listed indicate how each area of knowledge is emphasized on the test.

I. Financial Management (31%)

A. General Accounting (14%)

- Knowledge of general accounting procedures, systems, terms, concepts and policies, including familiarity with general ledger, general journal entries, cost accounting, fixed asset accounting, accounts receivable, and accounts payable.
- Knowledge of banking/investment policies and procedures and types of accounts.
- Knowledge of trust accounting procedures and regulations.
- Knowledge of U.S. federal payroll and employee benefit procedures, and tax and reporting requirements (e.g., Internal Revenue Service Code).

- Knowledge of legal organization structures and the laws and regulations regarding accounting procedures for each structure, including tax reporting requirements.
- Knowledge of special issues in accounting for law firm operations, including time and billing systems, alternative billing methods, collection procedures, cost recovery guidelines and electronic billing.

B. Financial Information and Analysis (17%)

- Knowledge of financing methods and investments (e.g., lease vs. buy).
- Knowledge of methods of financial analysis, including reading and interpreting financial statements, calculating and interpreting various financial ratios, conducting profit analyses, and analyzing comparative financial information across fiscal years.
- Knowledge of budgeting, financial reporting, cash flow analysis, model building, and variance analysis.
- Knowledge of alternative fee arrangements (e.g., bonus based, flat fee, task based, volume discounts).
- Knowledge of financial controls (e.g., division of responsibilities).
- Knowledge of client matter budgeting as it relates to electronic billing and/or allocation of firm time and resources.

II. Human Resources Management (33%)

A. Employee Selection and Promotion (9%)

- Knowledge of procedures and tools for recruiting, selecting, and promoting employees.
- Knowledge of U.S. federal employment laws (e.g., Civil Rights Act of 1991, Americans with Disabilities Act [ADA], Uniformed Services Employment and Reemployment Rights Act [USERRA]).

B. Performance Management and Compensation (19%)

- Knowledge of U.S. federal employee benefit laws (e.g., Consolidated Omnibus Budget Reconciliation Act [COBRA], Fair Labor Standards Act [FLSA], Family and Medical Leave Act [FMLA], Health Insurance Portability and Accountability Act [HIPAA], Employee Retirement Income Security Act [ERISA]).
- Knowledge of performance management systems (e.g., appraisal, disciplinary, and termination procedures).
- Knowledge and expertise in personnel training and development systems/methods.

Percentages indicate how each area of knowledge is emphasized on the test

- Knowledge of employee motivational techniques.
- Knowledge of incentives/rewards systems (compensation, employee benefits).
- Knowledge of substance abuse issues in the workplace (e.g., intervention techniques, assessment and treatment resources).

C. Organization Development (5%)

- Knowledge of leadership styles and techniques.
- Knowledge of team development and management principles (e.g., self-directed teams, team building).
- Knowledge of organizational development techniques (e.g., change management).
- Knowledge and skill in negotiation and conflict management techniques.

III. Legal Industry/Business Management (19%)

A. Legal Industry (11%)

- Knowledge of the American Bar Association Model Rules of Professional Ethics as it pertains to law firm management (e.g., conflict of interest, advertising, client file management).
- Knowledge of professional liability issues.
- Knowledge of changes/trends in the legal industry.
- Knowledge of records management and retention requirements (e.g., requirements for paper and electronic documents, discovery holds and requests).

B. Business Management (8%)

- Knowledge of business development techniques, including market analysis and business development tools (e.g., social media, website design, search engine optimization).
- Knowledge of laws and regulations regarding business insurance coverages.
- Knowledge of planning techniques (e.g., strategic, disaster, and business planning).

IV. Operations Management (17%)

A. Technology/Automation Management (5%)

- Knowledge of the features and capabilities of the Internet, web-based technology, hardware and software systems, including security and confidentiality.
- Knowledge of electronic privacy issues.

B. Operations (12%)

- Knowledge of facilities management procedures and techniques.
- Knowledge of lease/contract agreements.
- Knowledge of project management.
- Knowledge of work health issues (e.g., ergonomic work stations, EAPs).
- Knowledge of space assessment, design, and development strategies.

Exam Questions

The examination will include 125 questions, 25 of which will be included on a pilot basis and will not contribute toward the examinee's test score. Pilot items are distributed among all categories and are unidentifiable from other questions. Responses to pilot items are analyzed to determine if they qualify and are suitable for use in future exams.

Sample Exam Questions & Answers

The following test items are representative examples of the types of test items that will appear on the examination. Actual items may vary in content and difficulty level. A 25-question self-scoring practice examination will be sent upon acceptance of the application.

1. An asset placed in service today would be most commonly depreciated for U.S. Federal tax reporting purposes using which of the following methods?

- (a) Alternative Minimum Tax
- (b) Accelerated Cost Recovery System
- (c) Double Declining Balance
- (d) Modified Accelerated Cost Recovery System

2. According to the American with Disabilities Act (ADA), when are medical examinations for potential new hires allowed?

- (a) Once a job has been offered but prior to the commencement of employment
- (b) Within 30 days of commencement of employment
- (c) Prior to a position being offered
- (d) When the employer doubts the applicant's ability to perform

3. The term "selection procedure" as used by the Equal Employment Opportunity Commission (EEOC) includes:

- (a) Standardized tests only
- (b) Interviews only
- (c) Physical examinations only
- (d) Any procedure used as a basis for selection decisions

4. What characterizes an effective progressive discipline procedure?

- (a) It includes feedback which is provided after several offenses
- (b) It is intended to improve performance
- (c) It is a systematic process intended to lead to demotion or termination
- (d) It provides for informal counseling sessions

5. One of your attorneys has been asked to become a member of a client's board of directors. What should be your main concern?

- (a) The attorney may not be skilled to advise the board of directors in the complete scope of legal issues that may arise during board meetings
- (b) The attorney may be inclined to accept work projects either outside of the scope of the firm's resources and/or with unrealistic deadlines just to satisfy specific members of the board
- (c) The attorney's actions as a director may not be covered by your firm's professional liability insurance policy
- (d) The attorney's time may be redirection away from the practice of law to the interests of the corporation for which he or she is a director

6. "Claims made" professional liability insurance policies typically include a provision for "prior acts" coverage. This coverage reaches back in time to a period prior to the policy period. A condition precedent to this coverage is that the insured individual:

- (a) Purchased an extended reporting option at the conclusion of the prior policy period
- (b) Notified the carrier during the policy year in which the act, error or omission occurred of the possibility that something had happened that could give rise to a future claim
- (c) Diligently pursued a path to mitigate damages from some act, error or omission which was reported to the carrier in a subsequent period because of an unanticipated event
- (d) Did not know or could not have reasonably known that a particular act would result in a claim

7. What is the function of Application Service Providers (ASPs)?

- (a) To provide in-house help desk services to organizations
- (b) To host software applications and store data accessible over the Internet
- (c) To link voice and data systems using fiber optics
- (d) To provide analysis of optimal software applications to maximize workflow

8. In the strategic planning process, what addresses (a) what is involved, (b) when it begins and ends, (c) who will do it, (d) how much it will cost, and (e) the expected outcomes?

- (a) Vision statement
- (b) Goals statement
- (c) Statement of objectives
- (d) Action plan

9. According to ABA guidelines, when may a lawyer destroy client files?

- (a) One year after the conclusion of the matter
- (b) After the lawyers has attempted to return the file to the client and after ensuring that no legal or ethical restrictions prevent their destruction
- (c) If the lawyer, in his or her professional opinion, concludes that the matter is completed and the client has no further need of the file contents
- (d) Once the lawyers has determined that the client cannot or will not pay outstanding fees

10. If a firm terminated its 10-year lease in the middle of the seventh year, what would be the effect on the firm's year-end financial statement if the firm had made a \$500,000 outlay for tenant leasehold improvements?

- (a) The firm's current assets would be reduced.
- (b) The firm's depreciation/amortization for the year would increase.
- (c) The firm's total operating expense for the year would decrease.
- (d) Although the firm's income statement would be affected, the year-end balance sheet would not change as a result of this transaction.



Correct Answers: 1.d 2.a 3.d 4.b
5.c 6.d 7.b 8.d 9.b 10.b

Exam Preparation – Some Potential Resources

The following reading materials are **representative of the types** of materials that have been used as the sources for writing test items. **It is important to understand that no single resource is adequate for preparing for the exam.** In preparing for the CLM exam, other books and articles with similar subject matter may be used instead in preparing for the exam. **One should seek the most current edition or most recent year of any resources utilized.** Exam questions, may cover any of the areas on the Content Outline of the Body of Knowledge on pages 12-13.

NOTE: *These are suggested resources only. One does not need to purchase all the resources listed.*

General Resources

- Law Practice (magazine). ABA Law Practice Division (americanbar.org)
- Legal Management (magazine). Association of Legal Administrators (ALA) (alanet.org)

Financial Management

Any introductory college level accounting textbooks, plus industry-specific resources such as:

- ABA Standing Committee on Ethics and Professional Responsibility (Billing for Professional Fees, Disbursements and Other Expenses). American Bar Association.
- Accounting and Financial Planning for Law Firms (newsletters). Law Journal Newsletters, a Division of ALM Media.
- *Annotated Model Rules of Professional Conduct*, 7th Edition. ABA Publishing. Also available free online.
- Cotterman, J. *Compensation Plans for Law Firms*, 5th Edition. ABA Publishing: Law Practice Division.
- Iezzi, John B. *Results-Oriented Financial Management: A Step-by-Step Guide to Law Firm Profitability*, 2nd Edition. ABA Publishing: Law Practice Division.
- Quinn, J.P., Bailey, J. A., Gaulin, D. E. & Kolodziejczak, S. *Law Firm Accounting and Financial Management* (including current annual supplement). Law Journal Press.
- Robertson, M. *Alternative Fees for Business Lawyers and Their Clients*. ABA Publishing: Law Practice Division.

General tax resources such *Circular E, Employer's Tax Guide*, Publication No. 15. U.S. Internal Revenue Service.

Human Resources and Organizational Development

General textbooks such as:

- Brown, D. R. *An Experiential Approach to Organizational Development*, 8th Edition. Pearson Prentice Hall.
- Fisher, R., & Ury, W. *Getting to Yes: Negotiating Agreement Without Giving In*. Penguin Books.
- Mathis, R. L., & Jackson, J. H. *Human Resource Management*, 15th Edition. Cengage Learning.

Reference materials on current federal laws and government publications such as:

- I-9, Employment Eligibility Verification. U.S. Form 1-9, OMB No. 1115-0136. U.S. Citizenship and Immigration Services.
- *Americans With Disabilities Act (ADA)*. U.S. Department of Labor.
- *Consolidated Omnibus Budget Reconciliation Act (COBRA)*. U.S. Department of Labor.
- *Employee Retirement Income Security Act (ERISA)*. U.S. Department of Labor.
- *Fair Labor Standards Act (FLSA)*. U.S. Department of Labor.
- *Family and Medical Leave Act (FMLA)*. U.S. Department of Labor.
- *Health Information Technology for Economic and Clinical Health Act (HITECH)*. U.S. Department of Health & Human Services.
- *Health Insurance Portability and Accountability Act (HIPAA)*. U.S. Department of Health & Human Services.
- *Patient Protection and Affordable Care Act (PPACA)*. U.S. Department of Labor.
- *Title VII of the Civil Rights Act*. U.S. Equal Employment Opportunity Commission.
- *Uniformed Services Employment & Reemployment Rights Act (USERRA)*. U.S. Department of Labor.

Websites containing information on the above, along with related information include:

- Occupational Safety and Health Administration (osha.gov)
- U.S. Citizenship and Immigration Services (uscis.gov)
- U.S. Department of Health & Human Services (hhs.gov)
- U.S. Department of Justice (justice.gov)
- U.S. Department of Labor (dol.gov)
- U.S. Equal Employment Opportunity Commission (eeoc.gov)

Step 4: Take the Exam

Legal Industry/Business Management

General textbooks such as:

- Maister, D. H. *Managing the Professional Service Firm*. Free Press.
- Maister, D. H. *True Professionalism*. Free Press.
- Robbins, S. P., De Cenzo, D. A., & Coulter, M. *Fundamentals of Management: Essential Concepts and Applications*, 9th Edition. Prentice Hall.

Industry specific resources, such as:

- *Annotated Model Rules of Professional Conduct*, 7th Edition. ABA Publishing. Also available free online.
- Chiaiese, Beth. *Ethical and Legal Foundations of Law Firm Records Management and Information Governance*. ARMA International.
- Consultants at Altman Weil. *How to Manage Your Law Office*. Matthew Bender & Company, Inc.
- Cunningham, G. C., & Montana, J. *The Lawyer's Guide to Records Management and Retention*. ABA Publishing: Law Practice Division.
- Davis, A.E. *Risk Management: Survival Tools for Law Firms*, 2nd Edition. American Bar Association.
- Grella, T. C., & Hudkins, M. L. *The Lawyer's Guide to Strategic Planning: Defining, Setting, and Achieving Your Firm's Goals*. ABA Publishing: Law Practice Division.
- *Uniform Task-Based Management System: Litigation Code Set, Background, Definitions, Principles and Assumptions*. American Bar Association.

Operations Management

- *Law Technology News* (magazine).
- *General Conditions of the Contract for Construction*, AIA Document A201. American Institute of Architects.
- *Office Buildings: Standard Methods of Measurement* (ANSI/BOMA Z65.1—2010). BOMA International.
- Rhodes, J. & Polley, V. *The ABA Cybersecurity Handbook: A Resource for Attorneys, Law Firms and Business Professionals*. American Bar Association.
- Williams, M. *The Principles of Project Management*. SitePoint.

Websites containing information on the above, along with related information include:

- American Bar Association (americanbar.org)
- American Institute of Architects (aia.org)
- ARMA International (arma.org)
- Building Owners and Managers Association International (BOMA International) (boma.org)
- International Legal Technology Association (ILTA) (iltanet.org)
- Project Management Institute (PMI) (pmi.org)
- Web-based resources related to computer technology

What to Do/What to Expect:

- Report to the test site 30 minutes before the start of the exam.
 - Examinees who arrive after the exam has begun will be admitted at the discretion of the examiner.
- Agree to adhere to Pearson VUE's Candidate Rules Agreement.
- Present a photo identification such as a driver's license or passport.
- Expect to have your palm scanned and be asked to empty your pockets.
- Complete the exam within four (4) hours.
 - Examinees who complete the examination in less than four hours will be allowed to leave the test site.
 - Examinees are not permitted to work past the time scheduled for the completion of the examination.

"Bottom line, I was selected for the position because the partners had confidence in my abilities as a Certified Legal Manager. The firm heard about the CLM program and decided when placing the ad, they wanted one to help them take it to the next level."

Eric Hightower, CLM, SPHR
Director of Administration
Davis Agnor Rapaport & Skalny, LLC
Columbia, Maryland

Step 5: After the Exam

Getting Your Results

Exams are scored by our independent consultant - Human Resources Research Organization (HumRRO) - who provide each candidate a pass or not pass exam report that indicates, by percentage, how well you did in each subject area. Once the exams are scored by HumRRO, ALA's Certification Center processes the individual notifications. All notifications are mailed to the candidates at their preferred address. In all, it takes about **four to six weeks** after the exam date to receive notification. All exam and applicant information is handled with the strictest confidentiality.

1. Scores are provided to examinees only.
2. ALA endeavors to maintain strict confidentiality of all test results.

Passing Score Determination

The passing score for the CLM exam will be determined using an Angoff-based criterion-referencing process. This process is the standard in the certification industry. It helps to ensure that a test's passing score reflects an absolute performance standard that stays the same, regardless of how well or poorly a particular group of examinees performs on a given administration of the test. Each year the Certification Committee reviews the exam to ensure correctness and currency of the content.

Certification Certificate

When you pass the exam, a certificate and a lapel pin, which display your earned CLM designation, will be mailed to you approximately two to three weeks after you receive your exam results.

ALA Release Form: Notification of Your Achievement When You Pass

Prior to the exam, you will receive a Release Form to complete informing us of who you would like notified that you have passed the exam. These notifications are only sent when you pass the exam.

Failure to Pass the Exam

If you do not pass the exam, you will receive notification via a letter that includes your exam report which reports how well you did in each subject by percentage of correct answers. By identifying your strengths and weakness this report can be helpful should you decide to undertake further study initiatives and/or retake the exam.

Remember: You are allowed to retake the exam two times within forty-eight (48) months from the date of your application. The fee for the second and third exam is \$259 each. To sign up to retake the exam, contact certification@alanet.org prior to the application deadline of the exam date you choose to retake your exam.

You will be requested to send a letter of intent (include exam date), a copy of your exam report, and pay the \$259 retake fee.

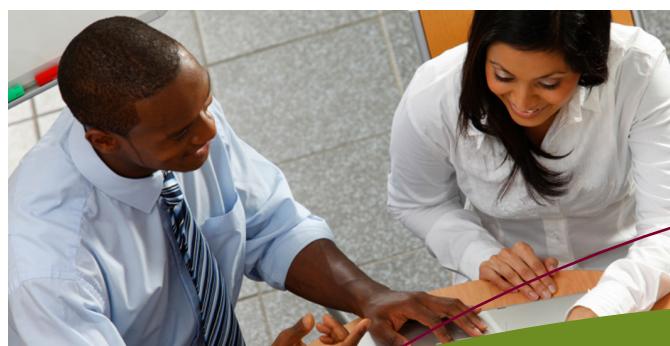
Address Change

Your examination score report will be sent to the preferred address you provided on the application unless the CLM Certification Center is notified otherwise. Email all changes of address to certification@alanet.org

Denial and Revocation of Certification

Certification will be denied or revoked if a candidate fails the examination, or if there is evidence of misrepresentation of qualifications, falsification or cheating. Failure to pay maintenance fees or meet recertification requirements will also cause the designation to be revoked.

Certified Legal Managers whose designation has been revoked for any reason may no longer represent themselves to be Certified Legal Managers, including no longer using the CLM acronym.



Step 6: Important Exam Policies

Maximum Time Period to Take the Exam

The CLM examination is administered online twice per year. Candidates must take their initial and all retake exams with forty-eight (48) months from the date of their application. Thereafter, candidates must submit a new application with full fees.

Reschedule Policy

1. Exams may be rescheduled by request to certification@alanet.org a minimum of five (5) days prior to the scheduled test date.
2. There is a \$159 fee to reschedule.

Retake Policy

1. A candidate who fails the examination is allowed to retake the examination two (2) times within a four-year period.
2. The fee for the second and third examinations is \$259 each.
3. Candidates who wish to schedule an examination retake should contact certification@alanet.org before the stated application deadline. They will be asked to pay the \$259 exam retake fee, provide letter of intent and a copy of their last exam report.

Re-Application Policy

After the third failed examination, or after forty-eight (48) months from the date of your initial application, the candidate who wishes to retake the examination will be required to reapply for the examination, meeting all employment, experience and education requirements as described on pages 4-5, including:

1. New educational documentation
2. Full certification application and examination fees

Refund Policy

1. If your application is not accepted, you will be refunded the examination fee less a \$150 processing fee.
2. All other fees submitted for services are nonrefundable, including rescheduling and retake fees.

Requests for refund of the examination fee (minus the \$150 processing fee) must be emailed to the CLM Certification Center at certification@alanet.org. Each request must contain the applicant's full name, mailing address and test date. Refunds will be made only to the individual or organization that paid the exam fee. If the refund is to be payable to an organization, the organization's tax identification number must be provided. Refunds will be credited or mailed approximately four to six weeks after the written refund request is received.

Exam Accommodations

ALA's certification examination complies with the Americans With Disabilities Act regulations governing both facilities and administration. Applicants requiring special arrangements because of a disability must contact the CLM Certification Center at certification@alanet.org as soon as possible before the exam date.

All published application deadlines apply to applicants requesting special arrangements because of a disability. There is no additional fee for accommodation for applicants with disabilities.

Policy Statement

Persons designated as Certified Legal Manager are experienced administrators who have demonstrated knowledge of legal administration through successful completion of required coursework and passing an examination. The Association of Legal Administrators, its officers, directors and members do not guarantee or endorse the competence or character of persons who receive the designation of CLM.

Recertification Guidelines and Fees

Term of Certification

The term of certification is three (3) years based on the designated anniversary date and each recertification period is also for three (3) years.

Your anniversary date will be either:

1. June 30 or November 30, whichever is closer to the actual date the exam was taken and passed.
2. Spring exam dates will have June 30 anniversary dates.
3. Fall exam dates will have November 30 anniversary dates.
4. **All recertification education must fall within the anniversary dates. Example:**

Your next recertification is June 30, 2016. Only education earned between your last anniversary date of June 30, 2013 and your current anniversary date of June 30, 2016 will count towards your current recertification.

Application Submissions

1. Applications may be submitted online at alanet.org/clm/recertify.aspx, emailed to certification@alanet.org or mailed to the CLM Certification Center, Association of Legal Administrators, 8700 W. Bryn Mawr Ave., Ste 110S, Chicago, IL 60631.
2. Applications must be submitted or postmarked by the application deadline.

Maintaining Certification

In order to maintain the CLM designation, a Certified Legal Manager must:

1. Pay an annual maintenance fee yearly on June 1st except in the year you recertify. Annual fees are subject to change.
2. Apply for recertification every three (3) years, and pay a recertification fee.
3. All certified legal managers are eligible to recertify. A certified legal manager does NOT have to be currently working in the legal industry to recertify his or her CLM designation.
4. Applications for recertification will not be accepted if submitted or postmarked after the established anniversary date deadline.

Note that individuals may not refer to themselves as a Certified Legal Manager or CLM if they are not a current CLM by maintaining their designation and recertifying by the deadline.

CLM Maintenance and Recertification fees	
CLM Maintenance Fee	CLM Recertification Fee
\$59 Due annually by June 1st except in the year in which you recertify.	\$189 Due every 3 years. See Recertification Guidelines.

CLM Recertification Fees and Applications can be submitted online at alanet.org/clm/recertify.aspx.

Education Requirements

To demonstrate that a Certified Legal Manager has maintained his or her knowledge, skills and abilities, you are required to:

1. Apply for recertification every three (3) years based on the designated anniversary date.
2. Provide evidence of having completed a total of 36 hours of course work during the prior three years including a minimum of three (3) hours in each of the following subject areas:
 - Communication and Organizational Management
 - Financial Management
 - Human Resources Management
 - Operations Management
 - Legal Industry/Business Management
3. As part of the total 36 hours, you must complete:
 - A minimum of 1 hour in business ethics
 - A minimum of 1 hour in substance abuse

NOTE: Substance Abuse and Business Ethics hours are part of the 36 hours of course work requirement. However, the minimum one hour each of Ethics and Substance Abuse can not be counted twice. For example, one hour of Substance Abuse, while likely an HR course, can not be counted towards the three hours needed to fulfill the HR requirement.

All sessions must be 60 minutes or more to qualify.

The following activities are not eligible for credit: meal functions, social activities, chapter or other business meetings, idea exchanges, roundtables, or vendor or consultant presentations intended to sell a product or service or for any reason other than educational instruction.

Credit for Teaching

Of the 36 hours, a maximum of four (4) hours credit can be teaching a course. This credit is for contact time only, and credit will not be given for course preparation or for presenting the same course more than once.

Credit for Self-Study

Of the 36 hours, a maximum of six (6) hours of credit can be earned from interactive, technology-based self-study program.

Self-Study Criteria

An interactive, technology-supported self-study program is defined as a program that uses interactive learning methodologies that monitor learning or participation in the course through the use of software or online technologies. Technology-supported self-study programs must include **all** of the following:

1. The program has a **course description** that includes **specific educational objectives**.
2. The program requires participant response to **questions that test for understanding** and provides feedback to participant responses indicating the response is correct or incorrect.



Webinar Criteria

1. **Live webinars** are considered as regular, live sessions (not self-study).
2. **Recorded, on-demand webinars** are considered self-study eligible for CLM credit **only when they include all of the following elements:**
 - Participants can contact the presenter to ask questions and they will receive a timely response.
 - Participation is monitored throughout the program using a system that requires periodic responses from the user.
 - Fast-forwarding is disabled.

What Does NOT Count for Self-Study

The following are examples of what does not count as interactive self-study:

1. Online programs that lack the interactive elements of the self-study criteria.
2. Listening to an audio program that lacks the interactive elements of the self-study criteria.
3. Watching a video that lacks the interactive elements of the self-study criteria.
4. Reading an article or book that lacks the interactive elements of the self-study criteria.

CLM Retired Status

Current CLMs in good standing who are fully retired from the legal industry but wish to retain their connection to the CLM community, may apply for the "CLM (Ret.)" designation.

Eligibility Requirements

To be eligible for CLM (Ret.) status applicants must:

- Be a current CLM in good standing at the time of application.
- Have recertified at least once.
- Be fully retired from the legal industry.
- Be deriving less than 25% of income from any work activities, including consulting or freelancing.
- Submit a qualifying application accompanied by a one-time non-refundable \$299 retired status fee.

Continuing Requirements

- CLM (Ret.) designees are subject to the same code of conduct and same disciplinary actions as CLMs.
- CLM (Ret.) designees must remain fully retired from the legal industry and derive less than 25% of income from any work activities, including consulting or freelancing.
- CLM (Ret.) designees must notify ALA headquarters at certification@alanet.org of any change in employment circumstances that would render the individual ineligible for CLM (Ret.) status, e.g. return to work activities that produce 25% or more of income, including consulting, or to working within the legal industry.

Rights and Privileges

Individuals granted CLM (Ret.) status may use CLM (Ret.) after their name, on social media, in correspondence, publications, speaking engagements and other public mentions to indicate their status as a Certified Legal Manager at the time of their retirement. CLM (Ret.) designees may not use the CLM designation without the (Ret.) suffix, and may not portray themselves as a current CLM.

Reactivation to CLM Status

Individuals who become CLM (Ret.) have the following options to reactivate their CLM designation:

1. If the application for CLM reactivation is made within three years of the last date of being a CLM in good standing, the individual must submit the required number of hours to recertify to reactivate their CLM, i.e., they must follow all the Recertification criteria as stated in the Recertification Guidelines to maintain their CLM designation.
2. If more than three years has passed since the last date of being a CLM in good standing, or if the requirements to reactivate are not met, the individual must reapply for the examination by meeting all employment, experience and educational requirements as described in the CLM Information/Application Packet, and achieve a passing examination score.

CLMs are encouraged to think carefully and wisely before changing to CLM (Ret.) status. CLMs are encouraged to maintain active CLM status by regularly recertifying if they are not sure they will remain fully retired from the legal industry.

The CLM (Ret.) designation is for current CLMs in good standing who are fully retired from the legal industry but wish to retain their connection to the CLM community.

Individuals granted CLM (Ret.) status may use CLM (Ret.) after their name, in correspondence, publications, speaking engagements and other public mentions to indicate their status as a Certified Legal Manager at the time of their retirement from the legal industry. CLM (Ret.) designees may not use the CLM designation without the (Ret.) suffix, and may not portray themselves as a current CLM.

Eligibility Requirements

To be eligible for the CLM (Ret.) applicants must:

- Be a current CLM in good standing at the time of their retirement from the legal industry.
- Have recertified at least once.
- Be deriving less than 25% of income from any work activities, including consulting or freelancing.
- Submit this application accompanied by a one-time non-refundable \$299 retired status fee.

CLM Reactivation

Individuals who become CLM (Ret.) have the following options to reactivate their CLM status:

1. If the application for CLM reactivation is made within three years of the last date of being a CLM in good standing, the individual must submit the required number of hours to recertify to reactivate their CLM, i.e., they must follow all the Recertification criteria as stated in the Recertification Guidelines to maintain their CLM.
2. If more than three years has passed since the last date of being a CLM in good standing, or if the requirements to reactivate are not met, the individual must reapply for the examination by meeting all employment, experience and educational requirements as described in the CLM Information/Application Packet, and achieve a passing examination score.

Please initial each page and mail, fax, or e-mail a pdf of your completed application to:

Mail:

Association of Legal Administrators
Attention: CLM Certification Center
8700 W Bryn Mawr Ave, Ste 110S
Chicago, IL 60631-3512

Fax: 847.267.1329 / **E-mail:** certification@alanet.org

There is no membership requirement to apply for the CLM (Ret.) designation and ALA members and nonmembers will be evaluated equally on this application. The CLM Program does not discriminate on any basis including race, sex, age, religion, national origin, sexual orientation, or disability. For further assistance, contact CLM staff at certification@alanet.org.

Please initial each page before submitting completed application. _____

SECTION 1: APPLICANT INFORMATION

Applicant Name: _____

ALA Member Number: _____

Address: _____

City/State/Zip: _____

Phone: _____

E-mail: _____

Date of last CLM renewal: _____

SECTION 2: APPLICANT STATUS

I am fully retired from the legal industry (Skip to Section 3)

I am earning less than 25% of income from all work activities including consulting or freelancing.

If you are employed, please fill out the following:

Title of Present Position: _____

Organization: _____

Address: _____

City/State/Zip: _____

Phone: _____

SECTION 3: PAYMENT

The application fee is **\$299**

Payment type: Check Enclosed
 Visa MasterCard American Express Discover

Cardholder Name: _____

Credit Card Account #: _____

Expiration Date: _____ Zip Code of Billing Address: _____

Signature: _____

SECTION 4: ATTESTATION

In submitting this application, I fully understand that it is an application only and does not guarantee retired status. I further understand and, by my signature, attest that I endorse the goals of the ALA Code of Professional Responsibility. I further understand that any false statement or misrepresentation that I may make in the course of these proceedings and application may result in the revocation of this application.

I understand that ALA reserves the right to revise or update this application and ALA's Code of Professional Responsibility, and that it is my responsibility to be aware of these current requirements. I further understand that I am obligated to inform CLM Staff at certification@alanet.org of changed circumstances that may materially affect my application. I further understand that it is my responsibility to provide any requested documentation in connection with this application.

I understand that if I am granted the CLM (Ret.) designation following acceptance of this application, such designation does not constitute a warranty or guarantee of my fitness or competency to practice as a legal executive. If I am granted the CLM (Ret.) designation, I authorize ALA to include my name in a list of certified individuals and agree to use the CLM (Ret.) designation and related trade names, trademarks, and logos only as permitted by CLM policies.

Applicant Signature: _____ Date: _____

Did You Know?

One of the many benefits of earning your Certified Legal Manager designation is the opportunity to receive an extra discount on your firm's professional liability insurance.

Hanover Insurance Group (an ALA VIP partner through GLJ Benefits Consultants) and Swiss Re offer significant insurance discounts for ALA members and additional discounts for CLMs.

Visit alanet.org/clm/benefits.aspx for more information. And don't forget to check with your own insurance agent to see what their company may offer.



8700 W. Bryn Mawr Avenue, Ste. 110S
Chicago, IL 60631-3512

847.267.1252 TEL

847.267.1329 FAX

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