Volunteer Handbook

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This handbook is intended to be viewed in its electronic form for ease of access to the many links to additional resources that are available throughout the document. Suggestions for ways to improve this or any other volunteer-related resource are welcome and should be directed to volunteers@alanet.org.

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[redacted]

Additional Resources:

- Cyber Security Article – Chicago Law Partners

THIS IS ALA

Starting with just 25 members in 1971, the Association of Legal Administrators (ALA) is now composed of over 9,000 members throughout the world. ALA was formed to provide support to those professionals involved in the operational management of law firms, corporate legal departments and government legal agencies. These individuals direct important areas of law office management, including human resources, finance, technology, facilities and marketing.

ALA members may join chapters that provide local educational activities and peer networking opportunities. ALA has over 80 chapters in 43 states, Mexico and Canada. The Cyber Chapter has no geographic base.

Vision and Mission Statements
As the role of law firm business leaders has grown, evolved and become more complex, so must the Association that represents them. To meet the challenges of this transformed legal industry, ALA has adopted vision and mission statements for the organization:

Vision Statement

Creating excellence. Driving Innovation. Empowering leaders in law.

Mission Statement

ALA is the catalyst for growth by providing:

- Diverse educational experiences
- Engaged peer communities
- Strategic solutions
- Dynamic resources
- Trusted networks

Focus Areas
To achieve the vision and mission, we have adopted core focus areas as part of the Strategic Direction established by the Board of Directors:

1. **Member Experience:** Create member experiences that are meaningful, accessible and personalized.

2. **Diversity, Equity, Inclusion and Accessibility:** Continually advance a welcoming and supportive culture in which everyone belongs and has a voice.

3. **Education and Professional Development:** Deliver timely and pertinent educational resources and growth opportunities.

4. **Impact:** Elevate the visibility and influence of the Association and our members.

5. **Innovation:** Lead the ecosystem toward a future defined by notable advancements and change.

Additional information regarding ALA's Strategic Direction is available on the website.

BYLAWS

ALA's bylaws can be found on the website. Chapter leaders are cautioned not to confuse ALA's bylaws with the Model Chapter Bylaws. When updating chapter bylaws, chapters should use the Model Chapter Bylaws as a guide.

ASSOCIATION GOVERNANCE PRACTICE STATEMENTS AND POLICIES

In 1994, the Board of Directors adopted a "policy governance" form of association management. Policy governance shifts the focus of volunteer leaders from volunteer-helper and watchdog to trustee-owner. This governance model emphasizes values, policies, goal setting, accountability for results and the empowerment of both Board and staff members.

ALA's Policies and Governance Practice Statements, which are regularly reviewed by the Board of Directors, serve as a foundation for the work of the Board of Directors, Executive Director, volunteer members and staff. They reflect a distinction between the development of vision, policy, direction and desired outcomes ("ends") by the Board, and the responsibility for development and execution ("means") of those ends by the headquarters staff.

CODE OF ETHICS

To maintain public trust, the legal profession must adhere to high ethical standards. ALA's Code of Ethics sets forth standards for the ethical administration of legal practices. Legal management professionals at all levels should become familiar with these standards and incorporate them into their everyday performance. They should study and comply with all ethical guidelines of bar associations and law societies that apply in their own jurisdictions. They must take the lead in communicating relevant standards to staff personnel who may be less familiar than lawyers with the ethical guidelines of bar associations and law societies as well as in communicating appropriate policies and procedures to lawyers.

KEY ATTRIBUTES OF SUCCESSFUL ALA LEADERS

Leadership is the foundation for all organizations. Leaders set high standards for themselves and are an example to those they expect to lead. ALA leaders are ambassadors of the Association and should strive to reflect the highest standards of leadership excellence through the following attributes: vision, communication, passion for the Association, reliability, inclusiveness, balance, respect and collaboration. Effective leaders are also expected to mentor others to develop and exemplify these attributes as they become future leaders.

Vision, communication, passion for the Association, reliability, inclusiveness, balance, respect and collaboration have been identified as key attributes. More information on the Key Attributes of Successful ALA Leaders can be found in the Volunteer Resource Hub.

ROLES AND RESPONSIBILITIES OF ALA VOLUNTEERS

International Board of Directors

ALA is governed by a Board of Directors that, along with key staff members, meets regularly throughout the year to discuss Association business. The Executive Director serves as an *ex-officio* (nonvoting) member of the Board. Board positions include President, President-Elect, Immediate Past President and between nine and 12 Directors from the membership at large. Directors serve three-year, nonrenewable terms.

The Board of Directors help drive and carry out **the mission and vision of ALA**. They serve as a voice for our membership, creating policies and decisions with the best interest of all members and the Association in mind. Individuals serving on the Board share many traits including courage, vision, communication, passion, reliability, inclusiveness, balance, respect, professionalism, collaboration and integrity. The Board serves as the link to all ALA members. They will keep members well-informed of the strategy and vision of the Association by providing communication to ALA leaders, chapters and members at large.

Committees, Advisory Councils, Project Teams and Task Forces

Committees, advisory councils, project teams and task forces are created to help the Board execute specific projects or tasks or, where appropriate, implement strategy and policy. Committees and advisory councils will be used as a resource for the Board to ensure consistent, efficient and timely development of Association strategy and policy. Project teams will be used for event planning, short-term needs or projects of the Board and are typically disbanded upon the completion of those events or projects. Task forces may be formed as a sub-group of the Board to focus on a specific need, topic or task. All leadership groups are reviewed annually by the Board to determine ongoing need.

The Board:

- Will identify the intent, expectations and authority of each committee, advisory council, project team or task force.
- May grant a leadership group the authority to speak or act for the Board for a specific and time-limited purpose.

Leadership Groups:

- Focus their work on implementation of Association strategy and policy.
- Serve as a resource to staff, but do not direct or exercise authority over staff.

In keeping with the Board's broader focus on strategy and policy, committees, advisory councils and project teams will normally not have direct dealings with current staff operations beyond working directly with the assigned staff liaison. However, in collaboration with staff and/or at the direction of the Board, these groups may be delegated responsibility for execution of specified tasks or means-related activities.

Leadership and position descriptions for each role are available on the website. Members and nonmembers may serve on ALA leadership groups, pending Board approval, and unless the current leadership group charter states otherwise. Task forces are made up of currently seated Directors and may have staff liaisons assigned.

The Board has both full oversight of and responsibility for the various leadership groups, with these

groups being accountable directly to the Board. The Board is responsible for appointing and removing members of each group and for appointing and removing the Chair and Vice Chair.

A liaison is assigned to every committee, advisory council and project team. The Board liaison is the group's link to the Board of Directors, and their responsibilities can be found on the ALA website. The Board liaison participates in all committee, advisory council and project team meetings.

ROLE AND RESPONSIBILITIES OF ALA HEADQUARTERS

Executive Director
The Executive Director is accountable to the Board acting as a body, and their authority is delegated by the Board through its vision, mission, strategic direction, plan of work, budget and policies.

Decisions or instructions of individual Board members, representatives or committee members are not binding on the Executive Director except in rare instances when the Board has specifically authorized such exercise of authority.

In the case of Board members, representatives or other leaders requesting information or assistance without Board authorizations, the Executive Director can refuse such requests that, in the Executive Director's judgment, require a material amount of staff time or funds or are disruptive.

ALA Staff
ALA employs professional staff, and all are willing to field your request.

Chapter leadership inquiries should be directed to *chapters@alanet.org*.

Each ALA committee, advisory council and project team is assigned an ALA staff liaison, in addition to a Board liaison. The ALA staff liaison serves as the communication agent from the leadership group to ALA headquarters. The leadership group should include the staff and Board liaison in all communications.

Working with Headquarters Staff
ALA policies and governance practice statements outline the roles, duties and relationship of the Board, Executive Director, committees and staff. These statements are reviewed and amended by the Board of Directors.

Another helpful resource is an article authored by Susan S. Radwan, CAE, titled "Relationship-Building." This article, published in the January/February 2015 edition of *Associations Now*, outlines these five basic dos and don'ts:

DO follow your chief executive's lead. Because CEOs are accountable for positive board relations, they determine the best communication channels for staff in fulfilling board requests. Many chief executives choose to be the direct link between the board and staff in all matters. Ask your CEO about their preference and heed the response.

DON'T give staff assignments. That is, unless you have a specific contact person, such as a committee liaison or administrative assistant to the Board. By asking staff to do something, you may undermine the CEO's priorities and accountability.

DO resist the urge to criticize or compliment staff directly. If a performance problem concerns you,

express it to the chief executive. When a compliment is due, ask the CEO to deliver it to the appropriate parties on your behalf. When you single out one person for praise, you may harm team morale.

DON'T intervene if a staff member approaches you about a problem with the CEO. The person is likely trying to do an end run around the boss. If you get involved, you undermine the employer-employee relationship. Instead, redirect that staff person to their immediate supervisor to resolve the issue.

DO keep relationships with staff professional, not personal. When Board members befriend staff members, the latter can easily misconstrue and feel as though they have special privileges. This could cause them to lose sight of the proper employer-employee relationship with the CEO and undermine the board's work.

Questions or concerns regarding the volunteer/staff relationships can be directed to ALA's Executive Director.

COMMUNICATIONS TO AND FROM ALA HEADQUARTERS

Email Communications

All Board members, the Executive Director and headquarters staff members are accessible via email.

Headquarters Communication

Communication with ALA headquarters is easy! All staff members have direct telephone numbers, voicemail and email access. You are not required to know your party's extension to leave a message for a particular staff member. For immediate assistance, you can reach an ALA representative between 8:30 a.m. and 5 p.m. Central, Monday through Friday, at +1-847-267-1252. After-hours calls are taken by an automated attendant with voicemail options.

FINANCIAL RESPONSIBILITIES — ALA LEADERSHIP GROUPS

Headquarters will pay approved invoices for leadership group activities. Headquarters is responsible for all recordkeeping, audit and tax reporting, and therefore the original invoice for payment is needed.

The ALA staff will disburse and account for funds consistent with Board-approved plans of work and will provide regular and ongoing reports to the appropriate individuals.

Committee, Advisory Council and Project Team Planning and Budgeting

With assistance from liaisons, committee and advisory council chairs and vice-chairs develop an annual plan of work for their respective groups. The plan of work is approved by the Board of Directors. The Board may amend the plan if necessary. Project teams do not prepare plans of work as their work is focused on a single project assigned by the Board of Directors. Upon approval by the Board, the plan and budget will be the group's plan of work, integrated with the overall ALA plan of work and budget. It will guide all activities and regulate all expenditure of funds for the relevant fiscal year.

Approval of Expenses

Reimbursement requests and invoices are processed for payment within the customary window of 30 days or fewer. Exceptions can be granted upon request.

BOOKING TRAVEL FOR ALA BUSINESS

Airline tickets may be purchased directly with airlines, through websites such as Expedia or Orbitz, or through your own travel agent. (Travel agency and/or booking fees are not reimbursable.)

Additional details regarding travel for ALA events are typically provided to participants in the weeks leading up to the event.Refer to ALA's Volunteer Travel Policy for further details on ALA business-related travel.

CALENDAR OF EVENTS

ALA's calendar of events is updated regularly. This calendar provides information on Association events. Members may subscribe to this calendar.

RELIEF/ASSISTANCE

As a 501(c)(6) organization, ALA is not positioned to collect or disseminate funds for disaster relief, nor would funds donated through the Association qualify as charitable donations. In the event of natural disasters such as hurricanes, earthquakes, tornadoes and floods, or acts of terrorism, chapters and members who wish to provide financial assistance are urged to do so through organizations that were created to handle relief efforts (e.g., the Red Cross or UNICEF).

AWARDS PROGRAM

ALA's Awards Program provides several opportunities for individuals, chapters and other law-related organizations (including business partners) to be recognized for their efforts on behalf of ALA and the legal community. Recipients are identified by the ALA Awards Project Team made up of members of the Chapter Connections Committee and Board of Directors. Full criteria for each award are available on ALA's website. Questions regarding these programs can be directed to *awards@alanet.org*.

Chapter of Distinction Award

ALA's Chapter of Distinction Award is awarded to chapters that go above and beyond to embody and promote ALA's Vision, Mission and Strategic Direction and, in doing so, have a true impact on members and the legal community in their area. Successful chapters strengthen ALA. We appreciate the hard work our chapters put in to make ALA a great resource for education, networking and support — and where members are welcome to learn and grow. The Chapter of Distinction Award is a way to recognize the efforts our chapters are making to help ALA follow its strategic direction.NextGen Leader Award
The NextGen Leader Award recognizes up to five members who embody the essence of the ALA Code of Ethics with their accomplishments, leadership qualities and the impact they are making within their legal organization, the legal industry and the Association. These individuals demonstrate conviction, dedication and relentless pursuit of personal and professional excellence through their engagement, advancement and influence in early interactions with ALA.

Elevate ALA Award
The Elevate ALA Award recognizes up to three recipients whose efforts in professional development, networking, visibility and inclusion are exemplary. These efforts should demonstrate advancement in the following areas:

- Professional development content
- Relationships between legal management professionals and their peers, as well as legal management professionals and business partners
- ALA's prominence in the legal community
- Diversity, equity, inclusion and accessibility (DEIA)

This award is open to chapters, individuals, law firms, legal departments, business partners and other organizations in the legal community.

Outstanding Association Volunteer Award

The recipient of the Outstanding Association Volunteer Award is one who has been recognized for either service on particular projects or on continuous/ongoing volunteer efforts. Generally, the recipient's service or efforts are at the international level.

Spirit of ALA Award

Often considered ALA's "lifetime achievement" award, this award is presented to those whose commitment to professionalism, dedication to the advancement of law firm administration and record of long-term service to ALA sets the standard for all who aspire to achievement, excellence and success. This award is not necessarily presented each year.

Ambassador Excellence Award

This award recognizes members who have provided an exceptional mentorship experience to an ALA member through the ALA Ambassador Program, which helps mentees navigate their first year of ALA programs, services and opportunities. Candidates for the Ambassador Excellence Award are nominated by mentees who feel they have grown under their ambassador's leadership.

Chapter Awards

ALA's Chapter Awards are designed to recognize chapters that have created innovative initiatives and experienced success by the chapter (or one of its committees) in various areas. These awards highlight innovative ideas, events or initiatives at work in three areas: Member Experience; Diversity, Equity, Inclusion and Accessibility; and Business Partner Relations. Awards are given in the categories of Large Chapter (for chapters with 75+ members) and Small Chapter (for chapters with less than 75 members).

Foundation Heart of ALA Award

This award recognizes an ALA member whose volunteer contributions (outside of volunteer work for ALA) promote and/or embody the Foundation's mission to educate, mentor and inspire people in inclusive ways. Eligible members nominated for the Foundation Heart of ALA Award are making meaningful contributions in their community through time, actions and dedication, and they are consistently creating opportunities that touch lives.

FOUNDATION OF THE ASSOCIATION OF LEGAL ADMINISTRATORS

The Foundation of the Association of Legal Administrators was formed by the ALA Board of Directors in 1981 and is recognized as a 501(c)(3) nonprofit organization. The Foundation's mission is to help educate, mentor and inspire current and future legal management professionals in inclusive ways that foster the development and increase awareness of the profession within the legal industry and our communities. The Foundation has contributed over a quarter-million dollars in grants, programs and sponsorships to support its mission and strategic objectives. Initiatives include the David W. Brezina Memorial Session at Annual Conference, the Susan L. French Emerging Leaders Fellowship, the Student Legal Career Scholarship program and the Growing Seeds program.

ALA LEADERSHIP SELECTION PROCESS

Volunteers are vital to the success of the Association, and each member is encouraged to participate!

Service on ALA committees, advisory councils and/or project teams is generally open to ALA members, business partners or other interested parties whose knowledge, skills and expertise are deemed useful to a specific project. Some groups have specific eligibility requirements. You can view each group's

charter and eligibility requirements on the Volunteer at ALA page.

Volunteer Selection Schedule typically is as follows:

Volunteer Position	Call for Volunteers	Selection Made
Nominating Committee	July	August
President-Elect, Board of Directors, Foundation Trustee	July/August	November
Chairs and Vice Chairs	September	November
Members (all groups)	October/November	January
SIG Leaders	February/March	April

Nonmembers interested in serving as a volunteer should reach out to ALA Headquarters. ALA also offers a variety of short-term volunteer opportunities for you to share your expertise with a time commitment that suits your schedule. More information on these roles, such as Member Ambassador and SIG leader, in available on this page.

Questions regarding the selection process, short-term opportunities or volunteer service in general can be directed to *volunteers@alanet.org*.

Nominating Committee

The Nominating Committee is responsible for selecting ALA's President-Elect and Directors.

The committee consists of:

- ALA's President (who chairs the committee)
- ALA's Immediate Past President
- ALA's President-Elect (who serves as a nonvoting member)
- ALA's Executive Director (who serves as a nonvoting member)
- Up to 12 members-at-large

Except for the President, Past President and President-Elect, members of the committee cannot be currently serving on the Board of Directors and shall not have served on the Board of Directors during the three years prior to their appointment. They also cannot be considered candidates for President-Elect or Director for the coming year.

The committee's efforts begin with a virtual meeting, usually held in September, and culminate in a formal in-person meeting in November. It is at that meeting that the next President-Elect and Board of Directors are recommended. Within a few days thereafter, the currently seated Board will ratify the appointments for the coming year.

ALA COMMITTEES, ADVISORY COUNCILS and PROJECT TEAMS

Composition

ALA's bylaws grant the Board of Directors the authority to establish or discontinue regular or special committees, councils or project teams. These groups assist ALA in meeting the needs of the membership and moving the Association forward, while maintaining a focus on our mission, vision and strategic direction.

Chairs, vice chairs and members are appointed for fixed, nonrenewable terms as defined by the position descriptions established for each role. Membership in these groups is open to any member, business partner or other interested party whose knowledge, skills and expertise is deemed useful to the committee's work, unless otherwise specified in the group's charter.

Standing Committees
Board-approved groups used on a continual basis comprised of members, business partners or other interested parties whose knowledge, skills and expertise are deemed useful to the work of the Association. Standing committees can be set forth in the Association's bylaws; these governance practice statements and policies or may be established by custom.

Ad Hoc Committees
Board-approved groups formed for a limited period of time to address a specific need comprised of members, business partners or other interested parties whose knowledge, skills and expertise are deemed useful to the work of the Association. When the work of an ad hoc committee is completed, the committee is dissolved. An ad hoc committee may exist for less than a year or for a year or more depending on the extent of the work assigned to it.

Advisory Councils
A Board-approved group that assists in carrying out the work of the Board of Directors by providing expertise and advice in selected areas.

Project Teams
Board-approved group comprised of ALA members, business partners and/or other interested parties whose knowledge, skills and expertise are deemed necessary and useful to a specific project. Project teams address short-term needs or projects of the Board and are typically disbanded upon the completion of those tasks or projects.

Short-Term Volunteer Opportunities
Opportunities are available to volunteers that would like to contribute to ALA but need a varied or reduced time commitment that better suits their schedule. These opportunities can be found on the ALA website here and include becoming a Member Ambassador, a Shared Interest Group (SIG) leader or an Online Community moderator, to name a few.

Call for Volunteers and Selection Guidelines
Each standing committee and advisory council usually have at least one membership opening per year while event related project teams will need an entirely new team each year. Headquarters staff will issue a call for volunteers through ALA's website, publications and various social media channels.

Peer-to-peer communication is often viewed as the most effective means of recruitment, particularly when seeking individuals to serve in volunteer roles. For that reason, it is critical that each group take an active role in soliciting expressions of interest for open positions.

Staff will forward the names of prospective volunteers to designated leaders shortly after the submission deadline has passed. The volunteer leadership group making the recommendations should develop a clear set of desired skills, traits and/or areas of expertise that would prove useful to that group's work using the Key Attributes of Successful ALA Leaders throughout the process and follow a recommended interview outline.

At the conclusion of the process, the designated leaders will provide a written recommendation that should include a rank of *all* interested individuals in order of preference. Once finalized, it will be presented to the Board for consideration. As per ALA's bylaws, the President shall then appoint the chair and the members of the committees, advisory councils and project teams subject to a majority vote of approval by the Board.

Upon approval by the Board, all interested parties will be notified of the final decision. As soon as all notifications have been made, both the Board and the group's staff liaison should be informed that the process is complete.

A brief orientation meeting should be held in the weeks leading up to the start of the term in addition to the orientation hosted by ALA staff and the Board. This call should include the chair, vice chair (where applicable), staff liaison, Board liaison and all new group members. Staff liaisons should have sample agendas on file from prior orientation calls.

Vacancies
Mid-term vacancies are filled on an as-needed basis, with the new member filling the remaining portion of the vacant position. Individuals filling less than 50% of the term left are eligible to run for another term.

Serving in Multiple Volunteer Roles
It is ALA's goal to encourage participation in Association activities and to broaden the opportunities for individual members to hold leadership positions in the Association. It is also ALA's goal to encourage leadership development through individual exposure to multiple areas of ALA activities, programs and responsibilities. To facilitate both opportunities for participation and broad-based leadership development, the Board has an established policy regarding service in multiple volunteer roles.

Leadership Group Minutes, Reports and Plan of Work
At the beginning of each group meeting (virtual call or in-person), one member of the group or the group's staff liaison should be assigned to take minutes of the meeting. A minutes template can be found here. Draft minutes should be distributed shortly after the meeting (ideally within one week), first to the chair for initial review and then to the entire volunteer group. The ALA staff liaison is responsible for maintaining the historical minutes, which should be stored in the group's Online Community.

Each standing committee and advisory council submits a report to the Board semi-annually. The report should detail the group's work during the past six-month period and follow the standard reporting template. It should also outline any issues or concerns the group would like the Board to address.

In addition to the reports, annually, each standing committee and advisory council will prepare a plan of work detailing how the group's work aligns with ALA's goals. These annual plans of work should follow the standard template and be developed in collaboration with both the group's Board and staff liaisons. Plans of work are to be submitted for review by the Board in the first quarter of the year and will take effect during the Annual Meeting of the Association, typically held in conjunction with the Annual Conference & Expo.

Each project team, focus group and Shared Interest Group will provide reports to the board regularly through their board or staff liaison.

CHAPTER GUIDANCE

The following sections provide guidance on best practices, resources and opportunities to assist chapter members with ALA chapter management. Most of the information in this section can also be found in the Chapter Resource Hub on the ALA website. If additional information is needed, please reach out to chapters@alanet.org or your Chapter Connections Committee liaison.

What the Headquarters Staff Expects from Chapter Volunteers

Headquarters relies on volunteers to keep them informed of chapter matters that are cause for celebration or those that warrant staff attention or awareness. Among other things, these include sharing chapter milestones, changes in chapter officers, chapter roster questions/updates, chapter successes or unresolved/continuing conflicts or issues in chapters.

Chapter Officers

Chapter officers are responsible for effective management of all chapter activities. They work closely with the Chapter Connections Committee and ALA headquarters to ensure recognition of the chapter and its members and are responsible for maintaining contact with those individuals to keep local members apprised of international activities.

CHAPTER BYLAWS

Each chapter has its own set of bylaws that guide its operations. Chapter leaders are cautioned not to confuse ALA's bylaws with the Model Chapter Bylaws. When updating chapter bylaws, chapters should use the Model Chapter Bylaws as a guide.

Bylaws can become outdated, and at times modifications may be needed to address the chapter's needs. Some sections must match the model verbatim. Other sections can be customized or modified to suit the chapter's needs. The Model Chapter Bylaws can serve as a guide, and headquarters staff can help chapters determine which areas should match and which areas have more flexibility.

If changes are needed, proposed revisions should be submitted to *chapters@alanet.org* for review via a redlined version of the current bylaws before a chapter vote. Chapters should allow five to 10 business days for review, although most can be performed in less time. Once the review is complete, you will be notified either 1) to proceed with a chapter vote to adopt the proposed amendments in accordance with the chapter's current bylaws, or 2) to make additional modifications before proceeding with a vote. After the final vote has been taken, the chapter should forward an executed copy of the newly adopted bylaws to *chapters@alanet.org*.

Compliance with ALA International Bylaws

ALA's bylaws state that "all members of a chapter must be members of the Association." This is an important requirement because ALA is a single organization whose structure involves a "parent" of international scope and many local chapters. Both the international organization and the local chapters play important roles in education, networking, programs, benefits and other services to legal administrators. Chapters receive their charters from the parent organization, operate under its umbrella and receive benefits and support through its volunteer leadership and headquarters staff. This system places mutual obligations and responsibilities on the parent organization and its chapters, as well as on individual members. As a result, chapter presidents must verify annually that all the chapter's members are also members of ALA.

This annual process usually begins in May with a notification to chapter presidents that includes a certification form to be signed, dated and returned. Along with the certification form, chapter presidents

are sometimes asked to provide a copy of the chapter's current bylaws. If the bylaws are requested, they will be reviewed to ensure the chapter's membership criteria is neither more nor less restrictive than ALA's and to ensure other necessary language is present. As practices often change, it is important that chapters keep this document current and in general conformity with the Model Chapter Bylaws.

Questions regarding compliance practices or bylaws should be directed to *chapters@alanet.org*.

PERFORMANCE OBJECTIVES FOR CHAPTERS

Every ALA chapter is held to a set of standards established by the ALA Board of Directors. These Chapter Performance Objectives promote effective chapter management by encouraging chapters to meet the professional development needs of their members and adhere to essential financial and legal responsibilities.

The objectives encourage chapters to plan effectively and set annual goals that support ALA's Strategic Direction, develop collaborative efforts to strengthen the flow of information through all levels of the Association and promote unity throughout the Association.

Every chapter is required to attest to its compliance with these objectives as part of the chapter compliance initiative that occurs annually each summer. The chapter compliance deadline can also be found on the chapter leaders timeline.

INCORPORATION, TAX RETURNS AND LEGAL MATTERS

Incorporation

All ALA chapters should be incorporated as a not-for-profit corporation. If a chapter is not incorporated, each of its members may be individually liable for the obligations of the chapter. By incorporating, only the assets of the chapter can be reached to fulfill legal obligations; the members' personal assets are protected.

Tax Return Requirements

Effective for taxable years beginning in 2007, all U.S. chapters must file a federal tax return. The question of what federal tax form an ALA chapter must file is affected by both a) whether it has obtained federal tax-exempt status, and b) its total gross receipts for the taxable year. More information regarding tax return requirements for U.S. chapters is available.

Antitrust Guidelines

All volunteers must be knowledgeable about antitrust guidelines and must see that these guidelines are observed at all meetings and programs, in publications and in listservs and/or discussion forums. At least annually antitrust guidelines should be shared with chapter members, which can be accomplished by including them in the chapter's newsletter or discussing them at a chapter meeting. More information on financial responsibilities of chapter leaders can be found later in the handbook.

LEGAL SERVICES

From time to time, chapters may need to seek legal advice, particularly on contractual matters and sometimes on tax and incorporation issues. Local firms (particularly those with an ALA member) will usually donate moderate amounts of time to assist or advise the chapter. However, if the chapter has questions regarding bylaws or survey reviews, contact *chapters@alanet.org*. If necessary, legal counsel will be retained at no charge to the chapter. Chapters are responsible for retaining local counsel for matters not related to bylaws or surveys.

Chapter Leadership
The most common chapter officer structure includes the following positions:

- President
- President-Elect and/or Vice President
- Secretary
- Treasurer
- Immediate Past President/Past President

(**Note:** Some chapters combine duties such as Secretary and Treasurer into one position.)

Several chapters also have officer or "extended board" positions, such as:

- Membership Chair
- Newsletter Editor
- Education/Program Officer
- At-Large Director(s)
- Diversity, Equity, Inclusion and Accessibility Chair

Sample chapter officer job descriptions are available by request from ALA Headquarters at *chapters@alanet.org*.

Continuity
A common problem in chapters is the feeling of "lost time" between the election of officers and the implementation of programs and ideas of the new officers. Chapter officer "crossover" meetings or retreats can be helpful in jump-starting the year. Officer manuals or related materials can also help to move the transition along. These may include:

- Job descriptions
- Long-range plans
- List of accomplishments
- Required tasks

The Chapter Playbook Template is available and may be a useful reference during these transitions.

Term of Office
The standard term of office is one year. Chapters are urged to hold elections in the first quarter of the calendar year assuming the leadership year begins on April 1. This allows the new slate of officers to participate in the Essentials of Chapter Leadership, chapter leader meetings at the Annual Conference and to become acquainted with ALA Directors, members of the Chapter Connections Committee and headquarters staff. Additionally, the incoming chapter leaders should consider participating in training opportunities provided by ALA headquarters to better acquaint themselves with their leadership responsibilities and roles.

Operating Year
Because the dates of ALA's Annual Conference & Expo vary from year to year, it is recommended that chapters use April 1 as the start of each operating year. This will provide for a more effective working relationship between ALA and the chapter and allow new chapter officers to participate in conference activities developed specifically for them.

Nominations and Election Procedures
The election process varies significantly among chapters. Most chapters conduct an annual business meeting to handle the necessary administrative affairs of the chapter, including elections. Chapters should refer to their own bylaws to ensure they are adhering to their nomination and election procedures.

Most chapters have Nominating Committees composed of members elected by the membership and/or appointed by the chapter's Board of Directors. Usually, one current officer or a member of the chapter's board serves on the Nominating Committee. The slate of officers selected by the Nominating Committee is presented to chapter members who are qualified to vote at a time specified in the chapter's bylaws or policies.

CHAPTER COMMITTEES

Each chapter committee should have a written statement of purpose, and goals should be established each year. Committees serve two major purposes in an organization: to provide a structure for focusing activity and to accomplish specific goals and to encourage more members to become involved in the organization. Chapter presidents often establish and assign members to committees, although committee chairs will also play a role in selecting committee members. The chapter's bylaws usually state whether committee chairs are voting or nonvoting members of the board. In addition to the standing committees, chapter presidents may form temporary committees or task forces to study a particular issue or to plan a one-time event.

CHAPTER MEETINGS

Board Meetings/Agendas
Effective meetings occur when board members receive the previous meeting's minutes and an agenda of the upcoming meeting in advance. Agendas may include:

- Approval of the minutes of the previous meeting
- President's report and announcements
- Treasurer's report
- Committee reports
- Association-wide news

- Other updates
- New business

Reports
Each officer should be prepared to make a brief report at each board meeting, and the Treasurer should distribute a written financial statement at each board meeting. The Chapter President should notify other officers when or if special or written reports will be required.

Minutes
It is essential that written minutes be kept and approved for each board meeting. The format of minutes may vary, but all minutes typically contain the following:

- The date, time and place of the meeting
- The names of board members present, the names of those who were absent and the names of any guests in attendance
- Establishment of a quorum
- Approval of previous minutes as distributed and/or amended
- For each report or topic, summarized concisely under a separate heading:
    - The subject of the question or report
    - Any discussion
    - Any action or decision
- The date, time and place of the next meeting
- The time the meeting adjourned
- A copy of the agenda and any written reports to the minutes
- Signature of the Secretary at the end of the report

The chapter's Secretary should maintain a permanent copy of all minutes. *Copies of all chapter board meeting minutes should also be uploaded to the Resources tab in the chapter's Online Community.*

General Meetings
Most chapters have regular educational meetings on specific topics and may include outside speakers, ALA member speakers and roundtable discussions. Chapter business can and should be communicated through the chapter's newsletter and/or during the opening segment of the educational meeting. Chapters should, however, have at least one business meeting a year. This usually is the meeting when new officers are installed.

This meeting often includes:

- Highlights of the year's accomplishments (outgoing President)
- Goals for the coming year (incoming President)
- Financial status of the chapter (outgoing Treasurer)

Members should be encouraged to provide feedback and suggestions at this meeting.

Education is the heart of ALA. Establish goals with fellow directors at the beginning of the year. Be sure your chapter structure can support these ambitions. Try to spread the activities carefully so you don't have too many demands at any time. Plan educational programs well in advance so the year is varied, balanced and interesting.

An annual member interest survey can be helpful in developing interesting program ideas, and ALA's

Annual Conference agenda contains a full selection of subjects to draw from. Questions about surveys can be directed to *chapters@alanet.org*.

Promoting Meetings
Meeting attendance is one of the best ways to promote membership and recognition of your chapter. Promotion of meetings is one of the most overlooked aspects of chapter organization. With so much competition for time, it is difficult to get people to attend even the best of meetings. It is important to get current and prospective members to meetings regularly. Remember that members become "prospects" at dues renewal time. Attendance at several good meetings during the year will make retaining members in the chapter easier.

Suggestions for retaining and attracting chapter members:

- Announce your chapter meetings or programs. Send releases to your local bar publications and newspapers. Be sure to include time, date, location, reasons to attend, contact name and phone number. Note who is invited to attend the activity (e.g., legal management professionals, managing partners, nonmembers, etc.).

- Invite managing partners to a chapter meeting/luncheon so they can become more familiar with the workings of ALA.

Consider a "Suppliers' Day" that features your chapter's supporting business partners. It may include tabletop exhibits that allow each business partner to display literature, sample products or services, and complimentary education sessions delivered by business partners in their expertise.

CHAPTER LEADER TRAINING

Each year ALA hosts its Chapter Leadership Institute (CLI), a two-day leadership and training program designed for current, incoming and future chapter leaders. Chapters are strongly encouraged to send at least one officer representative to CLI — ideally, the person who is serving as President-Elect at the time of the event. However, chapters can benefit from sending multiple officers, or their entire board, as this weekend can serve as education, onboarding and strategic planning/team building all at one event. CLI sessions focus on a wide array of chapter management issues such as:

- Membership and leadership recruitment
- Designing high-quality chapter programs
- Membership and business partner engagement
- Special events planning and collaboration

ALA also hosts Essentials of Chapter Leadership (ECL), a virtual training event held in the first quarter of the year. This event is intended to equip chapter leaders with instruction on chapter management as well as information on the importance of adhering to essential financial and legal responsibilities. One registration fee for the chapter allows for *unlimited* members of the chapter to attend, therefore serving not only current leaders but those interested in taking on a leadership role.

Chapter leadership events are designed to be motivational and informative, and they provide unique opportunities for chapter leaders to share ideas and solutions and to learn important chapter management details. Chapters are strongly encouraged to participate in these workshops. If a chapter is interested in participating in these events but concerned about the cost, the ALA Board of Directors has set aside funds to assist chapters in attending these events. Information about the funding assistance application process will be available on events webpage.

Questions regarding chapter leader training should be directed to *chapters@alanet.org*.

CHAPTER VISITS

Chapters are allowed to request one visit annually from the ALA Board of Directors. Chapters are encouraged to take advantage of this opportunity to provide the most current information, support and engagement between ALA leadership and the chapters. These visits can be conducted virtually or in person and presentations can cover a variety of ALA-related topics to the chapter board and/or chapter membership. To be considered, chapters must submit their request using this form. Expenses for these visits are typically covered by the chapter; however, ALA does set aside a modest budget each year to fund visits to chapters with limited funding. Decisions regarding chapter visits will be communicated from ALA Headquarters.

CHAPTER LEADERS' ONLINE COMMUNITY

The Chapter Leaders Online Community Group allows chapter leaders to share information and exchange ideas relating to chapter operations. There are no fees to participate, and all chapter leaders are encouraged to join this community group.

CHAPTER WEBSITES AND SOCIAL MEDIA

Many ALA chapters have developed websites. A website is your chapter's public face and is a vital asset to help attract new members and build awareness of your local presence. ALA headquarters includes links to chapter websites on the chapter's page under the 'Find a Chapter' search feature to help prospects, business partners and new members reach out to learn more. Be sure to refer to the Chapter Website Guidelines, License Agreement and ALA's Identity Standards Guidelines when developing or redesigning your chapter's site.

All new and redesigned chapter websites must be approved by ALA headquarters prior to going live. Contact *chapters@alanet.org* with questions or for approval of your chapter's website.

While maintaining a website is encouraged, ALA recognizes that not all chapters have the capacity to regularly manage one. In these cases, maintaining at least one active social media account can be an effective way to communicate with members, promote events and extend your chapter's reach. Platforms like LinkedIn and Facebook currently offer strong engagement across the ALA community and are recommended for chapter use.

All chapter social media accounts should reflect ALA's professional standards, follow applicable branding guidelines and be actively monitored to ensure content remains current and accurate.

Website Content for Your Chapter
Looking for additional content for your website? Please contact *chapters@alanet.org* for assistance.

INSURANCE

ALA provides general liability insurance and professional liability insurance at no cost to chapters. Directors & Officers Liability, Crime Insurance, Cyber Liability and cancellation insurance are available for purchase by a chapter in good standing. The summaries below are not meant to replace the actual policies. In the event of any conflict or ambiguity between the policy and the summary, the policy applies. General questions regarding insurance, including requests for Certificates of Insurance, should be directed to *chapters@alanet.org*.

A Note from the Insurance Carrier
Chapters hosting events at which alcohol will be served must require a Certificate of Insurance from the vendor furnishing the alcohol, evidencing proper coverage and ALA as an Additional Insured.

General Liability Insurance

This coverage is provided to all chapters at no cost. General liability insurance covers ALA-sponsored events (such as meetings, retreats and conferences) against third-party losses from bodily injury and/or property damage. If an event venue requires proof of insurance and/or to be listed as an additional insured, contact *chapters@alanet.org*. The coverage extends to losses from bodily injury/property damage, damage to premises rented to you and host liquor liability. (Standard terms and conditions apply.)

ALA's program carries liability limits as follows: $1 million combined limit of liability for bodily injury and property damage per occurrence subject to a $2 million annual aggregate; products/completed operations liability aggregate is included in the general aggregate. In addition, a $5 million umbrella liability policy is in force.

Professional Liability Insurance

This coverage is provided to all chapters at no cost. Professional liability insurance provides coverage for any act, error, omission, misstatement, misleading statement, neglect, breach of duty or personal injury tort, allegedly committed or attempted by an insured in the performance of or failure to perform professional services. Professional services are solely in the performance of providing chapter management services, complimentary programs and educational programs in legal administration and promoting information regarding administration and management issues for others. Personal injury tort includes libel, slander, defamation, wrongful entry or eviction, false arrest, malicious prosecution or invasion, infringement, or interference with rights of privacy.

Cancellation Insurance

Cancellation insurance is insurance that a chapter can purchase to protect itself from loss of revenue resulting from the cancellation of a major meeting, conference or event. These policies cover weather, strikes, fire and earthquakes (except California locations), but they do not cover war. Coverage for earthquakes is available at an extra cost. The premium for cancellation insurance is based on a percent of the projected gross revenue, by using a base, plus considering such factors as when and where the event will take place. Chapters need to decide what they are trying to protect and whether the risks merit the need for this type of insurance.

Crime Insurance

Crime insurance offers chapters protection against theft, embezzlement, social engineering fraud or other criminal misappropriation of funds. Any chapter in good standing may purchase this insurance through ALA during the open enrollment period.

Directors & Officers Coverage (D&O)

D&O coverage is available for chapters to purchase through ALA's provider. It offers the board members of each chapter protection from written demands for monetary or nonmonetary relief, civil or criminal proceedings against the board for actual or alleged acts, errors, omissions, misstatements, misleading statements or breaches of duty. Coverage also extends to Personal Injury or Publishers Liability (false arrest, wrongful detention, libel and slander, infringement of copyright or trademark, etc.) This coverage provides defense and indemnification costs and protects the personal assets of the individual board member.

Cyber Liability
Cyber Liability provides coverage for Privacy & Security Liability, Media Liability, Regulatory Proceedings, Breach Notification, Computer and Legal Experts, Betterment, Extortion, Data Restoration, Public Relations, Business Interruption, and System Failure.

REPORTING CHAPTER NEWS

To keep ALA members informed about activities and events, updates about chapter activities regularly appear in *BOLD Bites*, *Just the Facts* and *Legal Management,* as well as on ALA's social media accounts and on ALA's website. If your chapter has a story to share, please send an email with the details (and photos, if available) and/or social media post links to *chapters@alanet.org* for potential inclusion in future ALA publications.

SURVEYS

Many chapters conduct surveys that are beneficial to members. The most popular of these are Compensation and Benefits Surveys, Equipment Surveys and Membership Surveys.

ALA Compensation and Benefits Surveys
ALA headquarters publishes two annual compensation and benefits reports every fall: the Compensation and Benefits Survey and the Large Firm Key Staff Compensation Survey.

Chapters are requested to encourage chapter members to participate (at no cost) in the surveys during the spring by providing data for collection. The subsequent reports include national averages and data specifically for any state or metropolitan area with sufficient participation.

ALA members receive a significant discount when purchasing the final reports, and survey participants receive an additional discount plus access to an online dashboard to run customized reports specifically benchmarking their office locally and nationally.

Information about the surveys can be found here and questions should be sent to *compsurvey@alanet.org*.

Chapter Compensation and Benefits Surveys
It is important to have ALA headquarters review Chapter Compensation and Benefits Survey questionnaires each year prior to dissemination. This review will protect the chapter and help minimize risk for potential claims of antitrust. It is possible this review could take several days, particularly if ALA's legal counsel is asked to assist in the review. Survey questionnaires should be sent to *chapters@alanet.org* for review.

Before developing their own Compensation and Benefits Survey questionnaire, chapters are encouraged to study the ALA Antitrust Guide.

Basic concepts to keep in mind when developing this type of survey include:

- ALA's legal counsel recommends against collecting both billing rates and attorney or associate salaries.

- The reported data should include only historical information that is preferably at least three months old. Instructions should specify that the information being sought is for a 12-month period ending prior to the dissemination of the survey questionnaire.

- The raw data must be collected and tabulated by an independent third party (such as an accounting firm) that will maintain the confidentiality of individual firms' data. A confidentiality agreement should be entered into with the consulting/accounting firm. This agreement should be executed every time the chapter uses the firm, even if it is the same firm year-to-year. Refer to the sample confidentiality agreement, which addresses the following issues:

    - There should be one independent source for collection of the data.
    - The collected data should be maintained internally (by the third party).
    - The collected data should be made available only to those who need it while working on the project.
    - The collected data should be destroyed after the survey is completed.
    - The results must be presented in a confidential manner. Data should be aggregated, averaged or distributed in composite form consistent with the purpose of the statistical program but that conceals the identity of individual firms.

- *Participants*

  All law firms or law offices that could be construed to compete with one another should be allowed to participate by providing their economic data and obtaining the averaged results. It should then be compiled and presented so as not to permit identification of any individual participant's data. Participation in the program should be voluntary, and no auditing should occur. Nonmembers should be allowed to participate. Nonmember participants can be charged a higher amount for participation, but the higher amount must be directly related to the costs of producing the economic survey.

- *Nonparticipants*
  Parties who do not participate in the survey and cannot be construed as competitors of the participants do not have to be provided with the results of the survey. Limiting the results to the participants tends to encourage participation. Some participants do not wish to have the averaged data made available publicly. Therefore, if the data is to be sold to nonparticipants, that intention should be made clear when the survey questions are submitted to participants. If nonparticipant sales are to be made, it is suggested that charges to members and nonmembers not differ substantially. Since competing law offices and firms could have participated and received the data at the amount charged to participants, the costs to nonparticipants are not legally limited.

- *Trade between chapters of completed information*
  If the information is available to participants only, the information cannot be traded. If the information is not limited to participants only, then the finished product is available for sale or trade to anyone. Individual participant data may not be sold or traded.

- There should be a number of participants submitting data — preferably at least five — to eliminate any reasonable possibility of identifying or estimating individual firm data. While members may discuss data collection and dissemination procedures, discussion of the actual data by Association members should be avoided.

- The chapter should not provide any analysis of the data or make any recommendations relevant to the data's subject matter.

- Business surveys and similar data prepared by governmental agencies may be reproduced and disseminated.

Equipment Surveys

Most chapters structure Equipment Surveys using the "directory" approach that contains a listing of the various makes/models followed by an indication of which firms utilize them. The directory structure

allows chapter members to contact users of specific types or brands of equipment for additional information. There should be no attempt to rate or evaluate the equipment or business partners. Headquarters does not need to review equipment surveys.

Membership Surveys

Many chapters find value in performing Member Interest Surveys. The information gathered can help the chapter determine a variety of needs and wants from its members. These surveys are usually shorter and take little time for members to complete. Questions can include preferences for times and days for chapter meetings, professional development, special events, features of the chapter newsletter and special program ideas and topics. Membership surveys do not need to be reviewed by headquarters.

Similarly, ALA occasionally conducts a Volunteer Needs Survey for the full membership. Questions are relatively consistent to understand trends about what is important to and valued by volunteers.

Chapters are requested to encourage participation among chapter members to ensure that all voices are heard. Additional surveys are conducted periodically to assess member satisfaction and needs. Note that ALA has established a Survey Governance Policy to manage survey development, analysis and reporting in accordance with best practices. Questions regarding member surveys should be directed to *membership@alanet.org*. Questions regarding the Volunteer Needs Survey should be directed to *volunteers@alanet.org*.

Sales Tax on Surveys

Are ALA chapters liable for sales tax when they sell surveys? The answer depends on the applicable laws of the state in which the chapter is located — and there is no uniform answer. Generally, however, the sale of surveys is taxable. The final determination on whether the chapter is liable for sales tax needs to be made by competent local counsel familiar with the sales tax laws of your state.

ACTIVITIES AND OUTREACH PROGRAMS

Managing Partner/Corporate Counsel Events

Activities provide the chapter opportunities to offer programs of interest, promote ALA and network. Many chapters conduct managing partner events on an annual basis. This event's purpose is to provide a program of interest, an opportunity to become more familiar with ALA and networking.

The activity should be carefully organized to encourage attendance and portray the chapter in its best light. Avoid technical or self-serving topics. Ideally, form a committee to coordinate the activity. Dinners are usually held in a private dining room of a first-class hotel, business club or restaurant.

A typical program would include:

- Cocktail reception
- Dinner
- Brief ALA announcements and introductions
- Keynote speaker

Suggested speakers:

- Legal management consultants
- Educators
- Psychologists
- Judges or political figures
- Economists

Topics of interest:

- Marketing and client development
- Economic trends and financial management
- Conducting effective firm retreats

Be sure the chapter's name appears on the invitation and not simply "Association of Legal Administrators." Of note, the expenses for such an event can be much higher than an average chapter meeting. The chapter may want to underwrite some of the expenses (e.g., the cocktail reception) and charge less for attending the event than the actual costs. A budget must include anticipated expenses and revenues.

Business Partner Programs

Business Partner programs typically take the form of an annual agreement or an event specific partnership. Chapter business partner programs may offer tiered levels of support that can include distribution of materials to the chapter membership or other communications. It can also include direct access at an expo style event or, through an education opportunity. Details of these events are below.

Business partner shows: Making exhibit space available to local business partners at special chapter

events accomplishes several objectives:

- Fees can produce significant revenue
- Establish good relations with business partners
- Members can increase their knowledge of the products and services available

Exhibit booth contracts for chapter events should include a “hold harmless” clause protecting the chapter, ALA and the venue.

Seminars for business partners: Some chapters have successfully sponsored educational seminars to help business partners understand how to work effectively with law firms and law firm administrators. Business partners are invited to attend as registrants, not as exhibitors, and a panel of legal management professionals from firms and legal departments of various sizes presents the program. Some chapters have a second panel of business partners speaking to the administrators in the audience on how to work more effectively with business partners. Lists of business partners to invite to participate in such programs can be developed through a survey of chapter members.

Each chapter must decide whether its goal is to break even, make a profit or even lose money. With good planning and good publicity, activities can be a success story.

As with all other functions of this magnitude, it is helpful to establish a committee to concentrate on the planning of any business partner programs. Consider the budget, program and publicity. Follow ALA Antitrust Guidelines in dealing with product development issues. It is always recommended that proper arrangements are made with the exhibit hall or hotel for adequate electrical power and internet access.

If you allow business partners to use your logo, ALA Headquarters can provide a sample agreement designed to protect your chapter’s intellectual property. Additional guidance and resources for business partner programming can be found in the chapter resource hub under the business partner page. You can always reach out to your Chapter Connections Committee liaison or ALA Headquarters at *chapters@alanet.org* as well.

Retreats
Chapter retreats may be locally held one-day “idea exchanges” or full weekend events in a resort-type setting. A retreat format allows members to spend more time on topics that can only be treated superficially at regular chapter meetings. Some chapters use outside speakers as part of their program or invite a Chapter Connections Committee member to attend.

It is recommended that a committee be formed to plan the retreat. Successful retreats will have a budget, adequate publicity and a good agenda. Retreats provide networking in a more relaxed environment and can provide chapter members with opportunities for social events.

Bar Liaison Activities
Increase the visibility and credibility of the Association through liaison with the bar and other law-related associations at the local, state and national levels to help develop awareness and credibility of ALA as a key influencer in the legal industry. A chapter's Bar Liaison Committee may be the catalyst for co-sponsored activities with the bar association, which may include:

- Seminars
- Compensation surveys
- Equipment surveys
- Cosponsored publications, programs or activities
- Speaker exchanges

Often when bar associations agree to cosponsor events, they lend their name to the event and publicize the event to their members though they may not share in a proportionate amount of the work. This arrangement can be quite successful because ALA gets broader exposure and may be able to make those initial inroads to the local or state bar group.

When entering into joint agreements, be sure that both parties have a clear understanding of their responsibilities and how the expenses and profits of the program will be distributed.

Internship Programs
Internship programs provide valuable hands-on experience for students. Participation in these programs looks good on résumés and gives the student a pertinent reference source for potential employers. Member firms benefit from both participation by filling short-term staffing needs (at minimum, if any, cost) and the opportunity to evaluate the intern for possible employment without any obligation. If there are no nearby internship programs in your area, encourage educators to start them. Good internship programs benefit interns, schools and member firms.

Advisory Board
Members are encouraged to serve on program advisory boards when requested. This can be your opportunity to improve the quality of potential employees. Most boards rarely meet more than a few times each school year, and the educators are delighted to have input from the professional community on curriculum, technological trends and new programs.

LAW-RELATED ASSOCIATIONS

ALA has established formal and informal connections with several law-related associations. Together, ALA and these organizations identify and implement projects, programs and ideas that will benefit members in each group. Examples include providing speakers for one another's conferences, authors for one another's publications, cobranding and/or cross-selling of one another's products and exhibiting or advertising at one another's events. A list of ALA's Strategic Alliance Partners by Chapter is available in the Chapter Resource Hub.

COMMUNITY CONNECTION

The mission of Community Connection is to encourage ALA chapters, its members, firms, business partners, relatives and friends to come together to contribute time, energy and resources toward improving their own communities. Chapters may hold their service project on a designated weekend or in a specific month, or they can conduct several initiatives throughout the year.

OUTREACH TO COLLEGES AND UNIVERSITIES

Outreach programs have the potential of increasing the visibility and credibility of member firms, the profession, the chapter and ALA. Chapters that have sponsored educational outreach programs have done so to:

- Increase the number of students consciously seeking a career in the legal field.
- Improve the quality and diversity of prospective employees coming into the job market.
- Clear up misconceptions regarding the community's legal sector.
- Increase contacts that might allow members to evaluate new graduates for potential
- employment.

Your chapter membership represents a cross-section of the legal community and has members with expertise in law office management, human resources, accounting, business administration and systems and technology. The most frequent questions include:

- What kinds of career opportunities does the legal community offer?
- What training or special skills are needed for each?
- What is the difference between large firms, small firms and corporate law offices?
- What changes are being made in the law office due to technological advancements?
- What curriculum changes should be considered to reflect new trends?

Through these contacts, you may also be able to reach local chapters of state and national professional organizations, such as the National Business Education Association, American School Counselors Association or Placement Directors Association.

Digital resources promoting a career in legal administration, sample letters and examples can be made available by contacting *chapters@alanet.org* for assistance from ALA Headquarters staff.

MEMBERSHIP CRITERIA

Any individual with an interest in legal management may apply for ALA membership, provided their employer is not eligible to join forces with ALA as a business partner (note: as of 2024, consultants are considered business partners). Chapter leaders are encouraged to actively recruit and welcome all eligible professionals employed in legal management roles, including:

- Overall Management
- Financial Management
- Operations Management
- Technology Management
- Human Resources Management
- Legal Project Management
- Legal Marketing Management
- Legal Pricing Specialists
- Legal Process Management
- Corporate Law Department Management
- Government Legal Services Management
- Education Law Department Management
- Nonprofit Legal Service Organization Management
- Bar Association Management
- Law Department Management of Nonprofit Organizations
- Retired Legal Management Professionals
- Students

Chapter leaders should familiarize themselves with the eligibility criteria as outlined on the ALA website. Contact *membership@alanet.org* with any questions pertaining to membership eligibility.

APPROVAL OF MEMBER APPLICATIONS AND NOTIFICATION TO CHAPTERS OF NEW MEMBERS

Approval of Member Applications and Notification to Chapters of New Members In alignment with the approved Bylaws governing the Association, ALA headquarters processes and approves all membership applications. ALA recognizes and supports the need to work with its chapters to provide a consistent, harmonious and positive member experience for all those who desire to apply for and receive, membership in ALA and its chapters.

Headquarters staff has developed the appropriate procedures to ensure new members are connected to chapters in the nearest geographical area to where the new member resides. Procedures also exist to connect new members in locations not within 50 miles of a chapter. The responsibility of conducting outreach for the purpose of new chapter member recruitment lies with the chapter.

When applications for membership are received from individuals who fall within a perceived ambiguous area of interpretation of the Bylaws, the Executive Director (or their designee) determines if the applicant meets the eligibility requirements to be approved for membership.

ORGANIZATIONAL PRICING OPTION

In addition to the traditional Individual member, Organizational Pricing is an optional dues model that's based on the total number of attorneys across an entire organization, including all office locations in any country. It delivers better value for organizations of all sizes and offers the ability to extend ALA

membership to all legal management professionals employed by the organization who can benefit from ALA's resources — without any additional dues payment required.

Individual members under the Organizational Pricing option retain all the same benefits of ALA membership. Chapter Quarterly Reports denote Individual (Regular) members as RM and Organizational Pricing participants as GM in the category field.

The enrollment window for current ALA members to participate in Organizational Pricing for the upcoming term is open from August 1–September 30 each year. Organizations with no current ALA membership representation may enroll throughout the current membership term.

More information on Organizational Pricing is available on the ALA website. Contact *membership@alanet.org* with additional questions.

RECRUITING AND RETAINING MEMBERS

Finding and Recruiting New Members

- *Use the prospective members list located under your chapter roster URL that is provided by headquarters.* Reach out to those members (they have already joined ALA!) to determine if the prospect is interested in joining a local chapter. This link is updated in real time. Bookmark it and check it consistently!
- Use business directories to search for legal management professionals by management function area and/or managing partners.
- Create a digital, print-friendly chapter brochure that explains the benefits of belonging to a local chapter. When you provide a prospective member kit, it should contain the following and may be transmitted by email, mail or in person:
    - A cover letter explaining the benefits of membership
    - An application link or downloadable application
    - A membership brochure
- Develop enticing campaign offers on chapter dues, products and/or services.
- Conduct periodic membership campaigns (such as member-get-a-member, extended term, contests, prizes).
- Participate in periodic member recruitment campaigns conducted by ALA headquarters.
- Nonmember event attendees are your best prospects! To encourage nonmember attendees to join:
    - Be sure your Membership Committee is represented at the event.
        - Prior to the event, determine who from your Membership Committee will be at the event. Even the consummate networker can face obstacles making connections in a room where everyone already knows one another. Your Membership Committee members' primary focus should be to ensure nonmember attendees feel welcome at the event.
    - Introduce yourself to nonmember registrants by email prior to the event.
        - Consider sharing a link to your member directory listing so the prospect will know who to seek out at the event.
    - Consider printing nonmember badges in a way that makes them easily identified.
    - Greet nonmembers, assist them with making connections at the event and be sure to send a post-event email with membership information.
- Get the ALA name and chapter name out as much as possible using public relations strategies and tactics, such as media relations, social media, events and speaking engagements.
- Promote meetings/events through the media; consider advertising.
- Offer a free lunch or invite prospective members to a chapter meeting.
- Invite prospective members to a webinar. Be sure to provide them with joining information.

- Seek assistance from successful chapters, the Chapter Connections Committee or ALA headquarters. All are eager to help promote ALA.
- Work with business partners to reach their nonmember customers who qualify for membership.
- Set up managing partner breakfasts/luncheons/dinners.
- Add prospects from above tactics to distribution lists, including newsletters.
- Maintain social media presence locally.
- Comment on industry social media posts, such as @attnyatwork and @PinHawkHappens, with #ALABuzz.
- With permission, consider posting speaker presentations to Slideshare with chapter information.
- Optimize search results by including links to *alanet.org* and other partners and encourage partners to link to chapter website.
- Check your chapter roster URL regularly (at least quarterly) to ensure all chapter members are still ALA members.

Using the Phone

The phone can be a very useful tool in building membership in your chapter. However, if misused, it can have a negative impact on your efforts and do more harm than good. The best results are achieved by communicating first through other means and setting an appointment to connect by phone.

Helpful tips for phone use:

- Use only qualified members who are knowledgeable about ALA and the profession for phone communications and those who enjoy talking to prospective members.
- Establish early in the conversation if the timing of the call is convenient. If necessary, call back later or have the prospect call you when it is more convenient.
- Try to get specific actions from your call, such as a commitment to attend the next chapter meeting.
- Remove negative responders from your prospect list.

Follow-Through

- Once a prospective member has been identified, assign a "mentor" to greet and welcome the prospective member and have the mentor follow up with the prospective member before the next chapter meeting.
- Acknowledge receipt of a prospective member's application.
- Develop a new member onboarding program to introduce the new member to everything your chapter offers. Contact *membership@alanet.org* for more information.

Contests

One of the best ways to build chapter membership is to get as many current members involved in the membership building process as possible. Contests such as "Be a Member — Get a Member" campaigns work well for chapters. However, you should not assume that everyone wants to take part in the recruitment effort. Not everyone is (or wants to be) a good salesperson.

Suppliers who benefit from growth in your chapter are often willing and able to offer prize packages such as trips, equipment or supplies to be used as incentives.

Trade Shows or Meetings
Another effective way to attract and talk to prospective members is at a local trade show, such as through the American Bar Association, a chapter meeting or some similar gathering. Even if you don't sign up for prospect at a trade show exhibit, you have the opportunity of getting names and addresses so that you can follow up with direct mail efforts or telephone contacts.

Promotional, digital materials that describe the legal management profession and ALA are available for use by chapters and may be printed locally. Contact ALA headquarters for additional information.

Chapters should budget for their own giveaways.

Membership Participation
One of the challenges that chapters face is to encourage their members to take an active role in the chapter. To be effective, chapters should utilize the skills and talents of new and willing members. This will reduce burnout and any perceived sense that the chapter is governed by a select few.

Suggestions for member participation include:

- Seek out volunteers — don't wait for them to come to you.
- Follow up when someone expresses an interest in becoming more actively involved.
- Encourage committee chairs to be assertive in getting members on their committees.
- Keep experienced administrators involved by including them as speakers for some of your programs.

New Member Orientation
Whether new members become active members depends, in part, on the effectiveness of their orientation into the chapter. Suggestions for new member orientation include:

- Personally invite new members to the first meeting, then make a point of meeting them.
- List new members in the chapter's newsletter.
- Introduce new members at the first meeting.
- For new members attending events, consider following a process like nonmember event attendees.
- Assign an experienced member to each new member.
- Involve new members in chapter projects and committees.
- Develop and implement a new member onboarding program.
- Conduct periodic new member orientation sessions. The format for your program might include one-hour lunch or evening sessions and cover an overview of ALA, as well as answers to the following questions:
    - How does the chapter function?
    - Who are the chapter's officers?
    - What activities are planned for the coming year?
- Create a resource for those members new to ALA and/or new to the profession that might include:
    - Chapter membership directory
    - List of officers and committee chairs
    - Chapter bylaws
    - Chapter calendar of events
    - Articles on law office management

Keeping Members Active

- Involve members in writing articles or speaking at local and international levels.
- Regularly communicate the benefits of membership.
- Watch for absenteeism, as it can be a warning sign. Follow up at regular intervals in the form of letters or phone calls.
- For members that may not have time to invest in attending events or volunteering, highlight the ALA Online Community.
- Welcome new members with a call, email and/or letter.
- Don't forget about the unemployed members. They may have extra time now to devote to chapter activities!
- Involve members on committees.
- Offer job bank services for unemployed members.
- A simple thank you goes a long way! Be sure to thank members for their efforts.
- Have experienced members conduct orientation sessions.
- Follow up on dropped members. Conduct an exit interview to determine:
    - Why did the member drop? Was this an error?
    - What was of greatest/least benefit to the member?
    - Ask for suggestions.
    - Encourage reinstatement of membership — they need us most during tough times.
- Make sure your chapter continues to provide what its members need and deserve by conducting research through roundtables, focus groups and surveys.
- Establish liaisons with law-related associations, schools, etc.

MEMBERSHIP REPORTS

Chapter presidents and membership committees should use the unique chapter roster and prospect list link supplied by headquarters to maintain accurate chapter records. Follow-up with new and potential members are recommended.

Prospective Members

Using the unique chapter roster link supplied by ALA Headquarters also includes a prospect list below the chapter's active roster. This lists any member who during registration allows a chapter to contact them. Chapter leaders are welcome and encouraged to follow up with these prospects as well to make them aware of chapter offerings and ensure they have the information they need to proceed with ALA and chapter membership.

Contact ALA's membership team if you have questions regarding your roster.

REPORTING FORMS

To serve the chapter and the individual member effectively, ALA needs regular updates from chapters. The following reporting forms should be completed and sent to ALA headquarters while you are in office. Remember to send officer changes to ALA headquarters immediately following elections or as changes occur.

Chapter Officer Reporting Form

The Chapter President leaving office (or a designated officer) should submit the chapter officer reporting form immediately following the chapter's election of officers or if there is a change in chapter leadership during the year.

Chapter Profile Form

Pursuant to the requirements outlined in the Chapter Performance Objectives, chapter presidents are

asked to update their chapter profile form annually. The chapter profile form can be found in the Chapter Resource Hub and should be submitted each spring. Questions regarding this process should be directed to *chapters@alanet.org*.

Annual Compliance Certification
All chapters should be in full compliance with the bylaws provision that "All members of a Chapter must be members of the Association." Chapters must also attest that they are in compliance with the Chapter Performance Objectives. Certification of full compliance is required on an annual basis. This process is initiated by ALA headquarters in May or June of each year.

To assist chapters in maintaining compliance throughout the year, chapter presidents will receive an informal roster check initiated by ALA Headquarters at the end of each calendar year. Chapter leaders can also check their roster more frequently by referring to their unique roster link on the ALA website. Roster adjustments should be communicated to ALA headquarters at membership@alanet.org immediately.

THE VALUE OF ALA MEMBERSHIP

ALA is the premier professional association connecting leaders and managers within the legal industry and offers an array of benefits and resources, including:

- Extensive professional development across multiple platforms
- Collaborative and vibrant peer communities
- Engaging and dynamic live and virtual event learning experiences
- Strategic operational solutions
- Business partner connections
- Essential tools, samples and models that save time, money and/or solve challenging daily Problems
- Opportunities to grow as a leader and demonstrate mastery in the legal management field
- Sole source to earn the Certified Legal Manager (CLM)® Certification

As a chapter leader, practice the "elevator speech" you will deliver to concisely explain the value of ALA membership to any prospect. Find descriptions for these top-level benefits outlined below:

Networking

- Chapter Connections Committee
- ALA Online Community Groups
- Annual Conference & Expo
- Specialty Conferences
- Dedicated social media channels
- ALA Idea Exchanges or Roundtables

Knowledge

- Annual Conference & Expo
- Specialty Conferences
- Chapter Leader Educational Series
- *Legal Management* digital magazine
- *Legal Management Talk* podcast
- *Just the Facts* e-newsletter for chapter leaders
- *BOLD Bites* weekly e-newsletter
- E-Learning Courses
- Web-Based Courses
- Annual Compensation and Benefits Survey
- Webinars
- Certified Legal Manager (CLM)® Certification and Study Guide
- Continuing Education Credits (offered for selected programs)

Resources

- Online Member Directory
- ALA Career Center and Job Bank
- ALA DEIA Resource Hub (tools, resources, speakers)
- Mobile apps for ALA events
- Value in Partnership (VIP)SM program with exclusive discounts for members through our business partners
- Legal Marketplace business partner listings
- Resource Hubs with topic-specific assets in convenient groups for easy reference
- Chapter and leaders support (substantive educational tools, idea exchanges and workshops to educate chapter leaders)

ALA's Value in Partnership (VIP)SM Program

Members have the added benefit of ALA's Value in Partnership (VIP)SM Program. ALA works with many world-class organizations to offer tremendous benefits and savings to members. This means your ALA membership provides you and your firm with resources and services at discounted rates or special services from a reputable group of companies. ALA members, their employers and their families can enjoy the savings these benefits provide.

ALA PUBLICATIONS

Legal Management
Legal Management, the flagship educational publication of the Association of Legal Administrators, features articles on issues of vital importance to legal management professionals, managing partners and others involved in the business side of law. The digital magazine is published through the dedicated *Legal Management* website. The website is responsive and works on any device. The magazine covers topics in technological innovations, human resources trends, marketing, financial planning, leadership issues and general business practices. Readers can share the articles through social media and email.

***Legal Management Talk* Podcast**
Legal Management Talk is the podcast that covers all things legal administration, from leadership to HR to finance — and everything in between! New episodes are released every month, are less than 30 minutes long and are available on YouTube and multiple podcast streaming platforms.

BOLD (Business of Law Discussion) Bites
BOLD Bites is ALA's weekly e-newsletter that includes top headlines and quick links. It combines ALA news and industry news in an easy-to read format, so members and business partners get a more thorough overview of what's going on at the Association level and within the legal industry.

Just the Facts
Just the Facts is a monthly electronic communication that provides chapter leaders with important information relevant to their duties. Information on the *Just the Facts* webpage can be distributed to members through chapter newsletters or at chapter functions. *Just the Facts* is also sent to ALA's Board of Directors and Chapter Connections Committee.

ALA MEMBERS-EXCLUSIVE ONLINE COMMUNITY GROUPS

ALA's Online Community Groups help members connect and collaborate with peers on mutual interests and common issues unique to company size and type, functional specialty or niche market, providing access and control over how and when information is received.

The online community offers many great options to allow members to focus or customize their communications, including:

- Email roundups of popular discussions, sent as often as the member prefers
- Discussions with email digest at member's preferred frequency
- File and resource sharing
- Searchable member directory
- Direct message another member privately
- Polling feature
- Video discussion opportunities
- Special interest groups (e.g., FirstFive, diversity issues, human resources, technology, small firms, large firm administrators, IP, C-suite officers and more)
- Volunteer communities including the chapter leaders online community

Each chapter has their own online community group for *all* members of a chapter to privately hold discussions, store files and share information among themselves. Many chapters utilize their ALA Online Community

Group instead of a listserv. All chapters have a board of directors subgroup within their chapter's online community. To have members added or removed from that subgroup reach out to chapters@alanet.org.

Online Community resources, including a how-to video, knowledge base, Code of Conduct and more can be provided by emailing *membership@alanet.org* for assistance.

What Volunteer Moderators Need to Know
As a volunteer, you may find yourself in the position to moderate an Online Community.

Moderate for Potential Antitrust Violations
One of the most important duties of a moderator is to be aware of posts that may violate *Antitrust Guidelines*. Posts that put ALA at risk of violation must be modified or removed. Consult ALA staff for support if needed. Sample language and other resources are available.

Encourage Respectful Response and Interaction
The moderator plays a vital role in ensuring posts get responses and members interact in a polite and respectful manner. Be sure to review the Code of Conduct for additional tips and interaction rules. Contact *membership@alanet.org* if you notice anything that may need attention.

Managing Threads and Posts
As a group administrator, you can create, edit or remove posts. Administrators may also create Announcements that generate immediate email notifications to the group and remain at the top of the group feed in a carousel until removed or pin a post that will appear at the top of the group posts. Administrators may also create video discussion rooms and events. Community Group Administrators should not alter the global group settings for their groups. Contact *membership@alanet.org* for more information.

To assist your members in getting started in the Online Community Groups, be prepared to answer some common questions (see General Online Community FAQs) and refer members to headquarters staff at *membership@alanet.org* for additional assistance.

ALA JOB BOARD

ALA's Job Board was created to help individuals seeking to secure or fill positions within the legal management profession. This nationwide job board program brings together prospective employers and employees from every aspect of the legal marketplace. Job listings appear on ALA's website and in a weekly newsletter (subscription required). Blind box service is available to those who desire anonymity. Members and nonmembers may participate in the program, allowing current and former members who are in between positions to benefit from the service when they need ALA the most. ALA members receive discounts on ad postings and blind box services. Searching for open positions is always free for job seekers. Questions regarding this program should be directed to *jobs@alanet.org*.

EDUCATIONAL PROGRAM PLANNING OVERVIEW AND ACCREDITATION

Educational programming should be carried out according to standard adult education practices for a very simple reason — they make sense. By applying these fundamental principles, consistent, high-quality programs are created. Planning is always based on the learning needs of the target audience. Programs are designed using objectives that specify the session's overall goals and exactly what will be learned in that course. Then, an instructor is selected who is most qualified to teach those subjects in the preferred method. The last step of the process is an evaluation system that measures the extent

to which the objectives were met. Based on the information gleaned from the evaluations, the next program will be more effective, and the planning process has come full circle.

Note: ALA headquarters recommends the use of speaker agreements to clarify expectations for the chapter and the speaker.

EDUCATIONAL PROGRAMS, SEMINARS AND COURSES

ALA chapter meetings and programs are the key to the professional development of members. A guest speaker covering a carefully chosen topic can provide fresh insights. Equally important, the exchange of information among members can renew determination and purpose in resolving work-related problems. Developing meaningful programs is important for the chapter to provide maximum benefits for all members.

There are several techniques for planning a meeting to ensure it becomes a learning event. The following steps are used in developing interesting, timely and informative programs that are responsive to chapter needs:

- Review the Chapter Education Database for topic ideas and speaker information
- Define program topics and the objectives of each program
- Select and prepare the speaker appropriately
- Select a facility that provides a conducive learning environment
- Negotiate fees, expenses and other details with the speaker and with the facility
- Coordinate meeting logistics
- Promote the program to members and potential members
- Evaluate the program using the Individual Session Evaluation Form. Evaluation Data can be collected in physical evaluations or a digital version of the form
- Record details for future reference
- Enter compiled data from the event into the Chapter Education Database.

The responsibility for developing and implementing chapter programs often falls to the program director and/or program planning committee. Working closely with the Chapter Board of Directors, program plans and budgets are developed. Relevant, effective programming attracts and retains members. Other program ideas include:

- Develop and publish an annual program plan and budget
- Work with speakers before, during and after the event
- Address the various needs of your members, balance the annual program for the novice administrator (as well as the seasoned administrator) and balance programs of general interest with special interest programs
- Consider regular monthly program meetings and special program events (all-day seminars, retreats, etc.)
- Use outsiders occasionally (college, business, community speakers)
- Trade speakers with other chapters or law-related associations in your area
- Showcase senior members by involving them in your program planning and presentations
- Invite potential members to programs and to join ALA
- Invite a member of the ALA Board of Directors or Chapter Connections Committee to attend
- Different types of professional development forums will keep members active and interested. These might include:

Briefings

A briefing is a condensed delivery of highly focused information examining one specific topic, covering

the maximum amount of information in the minimum amount of time. Usually included are visuals (technology-based programs, such as PowerPoint, charts, models) and handouts. The speaker should be prepared to answer rigorous questions from the audience.

Training
A training session is a structured developmental program intended to increase the knowledge and skills of the participants in response to a specific needs assessment. Training usually requires at least one-half day and involves exercises, discussions and other interactions.

Presentations
A presentation usually concentrates on one topic and presents information, ideas and insight, and it lasts 60 minutes or more. Opportunities for asking questions should always be incorporated into the program and handouts are encouraged.

BOLD (Business of Law Discussions) Bites
These presentations are based on the popular TED Talks where presenters discuss practical tips and innovative and provocative ideas for 15 to 20 minutes.

Podcasts or Video Clips
A podcast or video clip could be 15 minutes in length and consist of 10 scripted questions and answers designed to support a speaker's presentation.

Idea Exchanges
While guest speakers often add to the importance of a chapter meeting, idea-sharing sessions should not be overlooked. Professional growth is the primary reason members attend an idea exchange. Explore a variety of topics, request objectivity in accepting ideas of other members and encourage open communication. The success of an idea exchange depends on everyone participating, as well as including the right participants. Consider whether business partners should be included. Idea exchanges serve several purposes, including:

- A professional support system for members
- The free flow of information
- An opportunity to improve problem-solving skills
- The right track to multiple sources of information
- The interchange among individuals in specific subject areas
- A safe place to ask for quality help
- An opportunity to learn from leaders in the field

Panel Discussions
Panel discussions are an effective way to get the views of many people on any given topic. When planning a panel session, the responsibility of planning should be assigned to one member. This individual advises each panelist on what they will cover. Each must know what the others are covering. They should construct questions to start the discussion and ensure the session's objectives are covered.

Office Tours
Some chapters reported that tours or a meeting where everyone invites their supervisor to learn about ALA and its activities are an effective change of pace.

Seminars

Local seminars are a way of both providing chapter members with in-depth educational information and raising funds for the chapter. Depending on the topic(s), seminars can be half-day, full-day or multiday events.

Business Partner Seminars
The inclusion of business partner displays along with the seminar program can provide an additional source of income for the chapter. Business partner seminars enable business partners to become more familiar with the way a law office works, the role of the administrator and an inside perspective on the "life of the administrator." The intent is to educate business partners, resulting in better working relationships and a better understanding of the specific needs of administrators.

KNOWLEDGE, SKILLS AND ABILITIES (KSAs) OF LEGAL ADMINISTRATORS' ASSESSMENT

The Competency-Based Education/Practice Analysis serves as the foundation for ALA's education and professional development programs, as well as the Certified Legal Manager (CLM)® program. By obtaining information about job requirements and professional development needs directly from legal management professionals, ALA can continue to meet the professional development needs of its members.

The KSA study is sent to a sampling of legal administrators and managing partners in the United States and internationally, and it identifies critical tasks performed by principal administrators and, more importantly, the knowledge, skills and abilities (competencies) needed to perform those tasks. The survey also asks which types of education sources are most preferable, what factors contribute to their decision to participate in professional development activities and opinions/reactions to the CLM program.

The results of the study help ALA members and other principal legal administrators, educators and employers develop a better understanding of the depth of the principal administrator's job. The identified competencies also provide an educational roadmap for ALA international and chapter programs. For more detailed information regarding the results of the latest survey contact *certification@alanet.org*.

GENERAL ACCREDITATION STANDARDS

Some of the general accreditation standards for program development are:

- The program should contribute to the professional competence of the participants.
- The program objectives, which must be stated in promotional materials, should specify the level of knowledge or competency the participant will be able to demonstrate upon completing the program. The levels are stated as essential, intermediate or advanced.
- The prerequisites for the program should be stated.
- Programs should be developed by subject matter experts and faculty capable of designing a quality program who can ensure that the content is current.
- Programs should be reviewed by a qualified person other than the preparer to ensure compliance with the above standards.
- Programs must be evaluated by participants.
- Faculty should be fully qualified by virtue of licensure, academic degree and work experience.
- Copies of handouts, evaluations and marketing materials must be kept on file for a minimum of three years for HRCI and SHRM and a minimum of five years for NASBA.

Many of the programs at the Annual Conference & Expo and Specialty Conferences provide continuing professional education (CPE) credit for certified public accountants (CPAs), Professional in Human Resources (PHR) and Senior Professional in Human Resources (SPHR) recertification for human resources professionals. Contact *certification@alanet.org* for more information.

PROVIDING CLM CREDIT FOR YOUR PROGRAMS

CLM Approved Provider Program

The Certified Legal Manager (CLM)® Approved Provider Program allows qualified ALA chapters and other organizations to self-identify courses that qualify for CLM application and recertification credit. This program is offered at no cost to qualifying ALA chapters.

ALA chapters are not required to become approved providers. Only CLM Approved Providers can advertise education sessions as eligible for specific CLM credit.

CLM Approved Providers are *required* to enter all programs into the Chapter Education Database and renew their application annually prior to January 1 of each year.

More details about the training required to become a CLM Approved Provider and the online application can be found on the website. Questions regarding the Certified Legal Manager (CLM) Approved Provider Program can be directed to *certification@alanet.org*.

CHAPTER EDUCATION DATABASE

The Chapter Education Database is a searchable database housing information from educational events presented by ALA chapters. The database may be used by chapter leaders to search for prospective program topics and speakers or types of speakers to consider.

OTHER EDUCATIONAL RESOURCES

Annual Conference & Expo

ALA's Annual Conference & Expo is recognized as the premier business of law educational conference, and meets the needs and interests of the novice, seasoned administrator, generalist and specialist. Many of the sessions meet the CLM requirements for legal management professionals, CPE requirements for accountants and PHR, SPHR, HRCI and SHRM recertification requirements for human resources professionals.

An integral part of the Annual Conference is the Exhibit Hall. With an average of more than 200 booths and 150 companies represented, ALA's Exhibit Hall is the largest showcase of products and solutions for the legal services industry.

Members who are experienced presenters are welcome to submit a proposal for the annual call for presentations. Members may also volunteer as session managers for the educational classes.

Conferences

Members can expect intensive educational sessions covering broad-based legal management and specialty topics and ample networking opportunities both virtually and in person. Check the ALA website for the most up-to-date listing of ALA conferences and events.

Certified Legal Manager (CLM)® Program

The CLM Program was created to help raise professional standards, encourage self-assessment and

award recognition to those legal administrators who meet prescribed levels of competence and ethical fitness.

The certification process includes educational and experience requirements along with passing an examination that tests knowledge of key competencies. Many chapters have formed study groups to assist their members in preparing for certification.

A guide to Developing a Certified Legal Manager Study Group is available upon request to *certification@alanet.org*.

Special Interest Conferences and Retreats

The needs of various niche audiences are met through specific educational programming. Speaker and panel presentations provide in-depth study on topics relevant to each group. Tremendous networking opportunities are an additional benefit of these programs. ALA offers the following specialty programs:

- **LegaLeaders: ALA's Executive Leadership Summit**
- **Level Up: ALA's Legal Management Fundamentals Conference**
- **Trending In Legal: ALA's Virtual Conference**

Please consult the ALA website as not all events happen each year.

Webinars

Webinars are presented live by subject matter experts and are also available on-demand approximately one to two days after they air.

Web-Based Courses

Web-Based Courses are currently offered in human resources and finance. These instructor-led courses meet for one hour each week for six weeks and are also available on-demand. Those who complete both courses in a topic are eligible to receive a Specialist Certificate after successfully taking and passing an exam.

CHAPTER NEWSLETTERS

Why Publish a Newsletter?

Chapter newsletters provide local and international information about the Association. They offer educational material that will be of interest to the chapter's membership at-large. More than half of ALA's chapters publish a newsletter. These vary in size, length, frequency and the type of information delivered. Some newsletters provide in-depth, thought-provoking or educational articles. Others offer information about ALA and its members. Many provide both. In any case, the newsletter is a positive means of communication among chapter members.

More information about newsletters, how to produce them, ideas and resources for content, as well as promotional materials for newsletters can be found here in the Chapter Resource Hub.

WHAT IS PR?

Public relations (PR) is a way for companies, organizations or people to enhance their reputations and gain awareness and attention that involves communicating with the media to present an organization in the most favorable way. Print and online media plays a vital role in providing accurate, consistent messages to ALA members, the legal community and the community at-large.

Sending news releases to the media is the most straightforward approach. To supplement local outlets, there are national services, such as PRWeb and Legal Support Network that can distribute news releases en masse to relevant media outlets. Please email *marketing@alanet.org* if you have questions and check out some of ALA's press releases for inspiration. Read the sections "How to Write News Releases" and "Working with the Media" further along in this document for more specific information.

Visit *google.com/alerts* to create and receive email alerts when the chapter, ALA or other relevant topics or keywords is mentioned online.

ALA leadership has a business and ethical obligation to pay close attention to the Association's brand value and reputation for the benefit of its members.

ALA worked with a PR firm to create a Media Relations Kit. This media kit is a comprehensive guide for effective communication and PR strategies, including essential components like, the Association's media relations policy, messaging matrix, guidelines for handling and proactively managing crisis communications, and more. Individuals and chapters should refer to media kit to ensure consistent communication with the media.

WHAT IS PUBLICITY?

Publicity is the act of attracting the media's attention and gaining visibility with the public. Is publicity a column in a local newspaper? A cover story in a national magazine? The mention of ALA in a long story about legal administration or a related field? A single photo in a newspaper or magazine? An annual report? An event listing in a business calendar? Yes, to all the above — and more.

Take a close look at your local newspaper's business section. Most of the stories on those pages are either news releases or stories based on releases. This is the primary place where ALA news releases appear, so the releases must be written to fit the style of that publication.

MARKETING PLANS

Effective marketing is planned; it is not composed of quick-fix tactics or 11th hour decisions. Creating your marketing plan will take time, but the benefits to your chapter (and ALA) are worth the effort.

Your plan should keep your members, potential members and nonmembers top of mind. Long-term, proactive planning is required.

A single person at the chapter level, a committee of members, an outside consultant or any combination of the above may develop the marketing plan. Consider appointing one person with overall responsibility for the project.

Key elements of a successful marketing plan include:

Needs Assessment
Begin with a needs assessment. If your chapter hasn't conducted one, use a recent assessment ALA has performed. Evaluate trends, competition and SWOTs (strengths, weaknesses, opportunities and threats) as you prepare your plan.

Target Market
Another key aspect is determining your target market. We all know that legal management professionals from private law firms, corporate or government legal departments and some legal agencies are eligible for membership. But the following individuals are also eligible for membership:

- Practicing lawyers involved in firm management
- Retired legal management professionals who are not otherwise employed
- Teachers and students at institutions of higher learning

Target your products and services accordingly. Tailor messaging to align with the specific interests of each audience segment.

Marketing Plan Goals and Objectives
Your chapter's marketing plan should be a living document. Goals
and objectives should be specific, measurable and time defined. Develop strategies that outline how you will achieve those goals, and tactics that describe how you will execute them.

Each primary topic should be listed under headings such as chapter membership, local events, national offerings, etc. Include a key message for each topic and ensure communications reinforce it.
Other considerations are budget, scheduling (i.e., avoid conducting membership campaigns during periods when chapter leadership is changing) and volunteer time needed to execute a plan.

Evaluate every stage of the plan. Keep detailed records of what works and what doesn't Document why initiatives succeed or fall short. Be willing to try new approaches when needed.

ALA MARKETING MATERIALS FOR EVENTS

The key to successful marketing for any brand is consistency. We've compiled these tools to help you communicate as a unified voice for ALA in the Chapter Resource Hub. Find branding and logo guidelines, ALA's PR Media Kit, presentations, newsletters and promotional materials there.

ALA's MarComm team can provide marketing materials in e-format for chapters to use. Materials are formatted so that they can be printed locally by the chapter if desired. Contact marketing@alanet.org with requests for materials or if alternate file formats are needed.

HOW TO WRITE NEWS RELEASES

A news release is a short news story sent to journalists, media outlets and online publications that reports on a current, newsworthy event. It may highlight chapter meetings, community initiatives, leadership announcements, awards, educational programs or industry insights.

Journalists and editors work on tight deadlines and review submissions quickly. The essential elements — who, what, when and where — should appear in the first paragraph. The why and how should follow.

Write in inverted-pyramid style, beginning with the most important information and move to supporting details. Use third person and an objective tone. Don't use "I," "we" or "you" (except in direct quotes). Refer to the Association or individuals by name or pronoun. Media outlets typically evaluate releases and pitches based on whether they are:

- Is it important to our readers? Does it have local significance?
- Is it timely?
- Is it accurate, truthful and complete?

If the story does not meet these criteria, revise the angle, localize the impact or identify a more appropriate outlet.

Ask yourself these questions before preparing to send the release. If the news item does not meet these criteria for publication, it will likely not run. You may have to change the angle of the piece or rely on a different publication for the publicity.

Key points to remember:

- Expand beyond traditional media
- Industry newsletters and association publications
- Online news platforms
- LinkedIn articles and posts
- Chapter websites and email newsletters

Most outlets prefer email pitches rather than attachments. Include a concise pitch in the body of the email, paste the release below it and provide clear contact information. Keep releases to one page when possible and tailor pitches to each outlet rather than sending mass distributions.

Sample News Releases

Sample news releases are available on ALA's website. The release follows a standard format and includes all the elements of a basic news release.

WORKING WITH THE MEDIA

Effective media outreach requires understanding and anticipating journalists' needs. Building one-on-one relationships with the media is important. This can be accomplished through the following:

- Follow key publications and reporters. Familiarize yourself with the types of stories they cover and provide relevant, timeline information about your chapter.
- Provide accurate, concise information in a forthright and professional manner.
- Reach out periodically to introduce yourself, offer story ideas or serve as a resource. Ask how you can support their coverage needs.
- Know and meet the deadlines for each publication.
- Responding to media inquiries in a timely and professional manner will help strengthen media relationships and help your chapter achieve its public relations goals. As you develop relationships with the media, they may begin to contact you for information about your chapter's activities or about stories they are writing that relate to the legal profession.

Designate an official chapter spokesperson (often the president or communications/public relations chair). Include this person's name, title and contact information in all media materials.

Creating a Media List

Create and maintain an up-to-date list of local and regional media contacts who may be interested in your chapter activities. These may include local newspapers, business and legal publications (including newsletters), radio and TV stations, and online news organizations, and bloggers who cover legal or business topics.

Include reporter names whenever possible, along with titles, email addresses and submission preferences. Media roles change frequently, so review and update your list regularly. Start by identifying outlets that regularly cover the legal profession, business community or nonprofit organizations in your area.

Media databases, such as Cision, provide searchable directories of journalists and outlets. You may also find contact information on publication websites or through professional networking platforms.

ALA LOGO AND BRAND (IDENTITY STANDARDS GUIDELINES)

When preparing Association materials, the Brand Identity Style Guidelines can answer questions on the correct use of the Association logo and colors, how ALA's name should appear on general correspondence and related identity issues.

CHAPTER LOGOS

Chapter logos play an important role in identifying chapters, connecting to the ALA, and fostering engagement with members. To ensure a consistent and recognizable ALA brand, the Brand Identity Style Guidelines have been updated to clarify design requirements for chapter logos. Any new or redesigned chapter logos must align with the updated standards and receive approval from ALA headquarters (*marketing@alanet.org* or *chapters@alanet.org*) before being used.

If you allow other organizations to use your logo, see the sample agreement designed to protect your chapter's intellectual property.

HOW TO USE PHOTOS

A news release stands a better chance of being picked up if you can offer a good photo to go along with it. What makes a good photo?

- A small number of subjects — usually no more than four.
- Subjects close together with a neutral background.
- High-resolution digital photos (300 dpi) are preferred for print newspapers. It is best to know the publication's requirements before sending the photo.
- Avoid cliché shots of people shaking hands or receiving a plaque.
- Whenever possible, have motion in the photo.
- Attach a caption to every photo that identifies your group, individuals in the photo, the activity it is showing and the date it was taken. Be sure the caption is sent with the photo.

Maintain a continuous, up-to-date photo file. Keep photos taken at chapter seminars, conferences and other activities, and of chapter members (or, at least, current chapter officers).

NONPRINT PUBLICITY

When publicizing your chapter, don't restrict yourself to print media. Even in larger markets, you may find that many radio and TV stations are willing to publicize activities of organizations. This would include:

- Business and financial editors of the news department
- Talk show hosts
- Producers of public service programming
- Cable TV

A phone conversation or personal contact with these people discussing the chapter and the whole field of legal management can be very worthwhile in achieving exposure for your activities.

Contact *marketing@alanet.org* for tips on implementing activities to help audiences gain a better understanding of your group and of ALA.

DIRECT MAIL

Letters and brochures should be printed on good quality paper by a competent printer. Badly printed or cheap-looking promotions do not achieve desired results. Suggestions for successful direct mail promotions include:

- Develop a good list of prospects. Work with local American Bar Association directories, commercial mailing list sources and your CCC liaison to develop good lists of prospects. A greater level of success is achieved if your list is personalized instead of using a "Dear Legal Manager" approach.

- Determine the goal or purpose of your mailing. Test different approaches throughout the year. If promoting membership, a good frequency is monthly (if the chapter can afford it).

- Keep it short and simple (KISS). Brevity is important in writing direct mail promotions. Good advertising copy, particularly direct-mail copy, requires short sentences and phrases, uncomplicated sentences and picture words (not necessarily long words).
- The timing of direct mail for meeting notices is crucial. You should be prepared to announce your meetings three times: at the beginning of the year, three weeks before the event and,

finally, one week before the event.

- Use news releases. News releases should be sent out 10 days before the meeting (two months before for monthly publications).

- Go first-class with postage and appearance. Using third-class mail is unpredictable and delays of a week or more may occur. Third-class materials tend to get sorted out or even thrown out in many mailrooms. First-class postage is best for promoting meetings. Have letters and brochures printed on good quality paper by a competent printer. Badly printed or cheap-looking promotions do not achieve the desired results.

- Stress the benefits. The word “you” should appear in any headline. The reader should get at least one solid benefit from the headline. In addition, meeting programs and topics should be simple, concise and specific.

- Use photographs or artwork. They can add visual impact and interest to your materials.

- Make it easy for people to respond to your mailing. You’ll get a better response if you enclose a postage-paid business reply card or envelope in your mailings.

- Document the results of promotional efforts. Testing is an important aspect of direct-mail advertising. Determine which formats or approaches have been successful and be sure to document the results. (You might also gather promotional samples from other professional organizations.)

Working with Printers and Mailing Houses

Unless the chapter reproduces meeting notices and other promotional materials, outside printers and mailing houses are used. To make those efforts more effective, economical and productive, here are some tips when working with printers and mailing houses:

- Provide material in a neat and well-organized form.
- Keep the message and format as simple as possible.
- Use pertinent images in your mailing to dress up the appearance and add to the message’s impact.
- Ensure the printer or mailing house has an updated mailing list.
- Avoid rush jobs. Make sure the printer/mailing house is allowed adequate time to do the job properly.
- Obtain quotes from the printer/mailing house on all projects to avoid invoice surprises.
- Establish ground rules with the printer/mailing house regarding the deadline, cost and quality you expect.
- Put yourself on the mailing list so you can monitor the mailing.
- Know that edits made at the printer-proof stage can be costly. Try to send the cleanest (and most accurate) files to the printer.

E-MARKETING

E-marketing can attract more people to your chapter website, increase members for your chapter and enhance branding of your chapter and its services.

Website
If you already have a website, start with a simple web promotion plan. If you don't have one but plan to build one, start with a simple and effective web design and development plan. Email *chapters@alanet.org* for prior approval of new website.

Search engine results can be greatly improved by including relevant industry content on the homepage and within the website and by encouraging partners to link to the website.

Social Networking
Social media is a great way to get in front of audiences who are discussing topics related to your chapter, expertise, product or service. Which platform should you use? Choose one or two where most of your audience is engaged. The top social media platforms that our members report using are LinkedIn, Facebook and Instagram. If you'd rather participate in the international ALA groups, we welcome you, your chapter members and prospects. Here are the main links for those groups:

- LinkedIn company page
- Facebook
- Instagram: @ALA_buzz

Email Marketing
Email marketing is a form of direct marketing that uses email as its communication channel. Direct marketing is an umbrella term used to describe all marketing forms that go straight to the end user, thus not passing through the traditional mass communications channels, like a magazine or newspaper. As a tactic, email marketing is very flexible and can be used for a wide range of purposes. You could use it to drive more traffic to your website, promote events, build a relationship with your existing members, promote new services and more.

The field of e-marketing is constantly evolving, so here are some sources we follow to stay informed about the latest trends and technology:

- Social Media Examiner
- Content Marketing Institute
- Duct Tape Marketing
- MarketingSherpa

Email communications should be succinct, with an interesting subject line as well as key information and the most important link near the top of the message. Sales words such as "free" or "deal" should be avoided so that they do not trigger spam filters. Also, avoid any exclamation points in subject lines as that may trigger spam filters, too. Many tools exist, such as Constant Contact and MailChimp, to assist

in designing and deploying email marketing and to provide information about how many people open and click on each email. This can be used to test email marketing and determine what has been successful and is more likely to succeed in the future.

MAILING LISTS

ALA headquarters can compile member mailing lists in Excel format for recruitment campaigns, for joint efforts with a nearby chapter or for independent members (those not affiliated with a chapter) who live/work nearby. Chapter requests should be directed to *membership@alanet.org*. While most requests can be processed within a few days, please allow 7 to 10 business days for processing.

Note: Headquarters cannot fill requests for lists for chapter newsletters or routine chapter mailings.

FINANCIAL RESPONSIBILITIES OF CHAPTER LEADERS

Chapter leaders are responsible for managing chapter funds. The following guidelines are recommended:

Chapter Budgets

- Establish an annual budget of anticipated revenues, expenses and net profit or loss.
- Review actual expenses against the budget on a quarterly basis.
- Separate budgets should be prepared (and reviewed by the chapter's Board of Directors) for activities that occur during the course of the year such as seminars and surveys.
- Include travel funds for the Chapter President and/or other officers to attend the Annual Conference & Expo, Chapter Leadership Institute, leadership events and/or training sessions.

Financial Transactions

The guidelines below are based on the principle that the person receiving or disbursing funds should not be the same person actually making deposits, issuing checks or reconciling bank statements. Controls will vary depending on the size and activities of the chapter.

Cash Receipts

The person responsible for the particular income should receive the money coming into the chapter. For example:

- Dues are collected by the Membership Chair.
- Luncheon fees are collected by a person(s) designated by the Chapter President.
- Seminar fees are collected by the seminar planning committee member(s).

The person receiving the funds should prepare a list for the Treasurer with the payments to be deposited. A copy might also go to the Chapter President.

Cash Disbursements

Invoices approved by authorized persons should go to the Treasurer for payment. The Treasurer should attach a copy of the invoice to the check as backup information.

Banking Resolution/Signature Cards

Chapters should have a banking resolution that authorizes officer positions as signatories. Authorized signatories usually include the President, President-Elect and Treasurer. Signature cards should be updated annually or changed as needed. The following are recommended guidelines:

- One signature of the President or President-Elect is required for amounts up to $500.
- Any two signatures of the above listed officers are required for amounts over $500.

Bank Statements and Canceled Checks

For financial security, a good practice is to have bank statements and canceled checks sent to an officer other than the Treasurer for initial review and auditing.

Bank Reconciliation

The chapter's Treasurer might normally handle reconciliation; however, to secure crime insurance coverage through ALA's carrier, bank statements must be reconciled by someone not authorized to deposit or withdraw monies.

Treasurer's Report

A monthly report detailing each item of income and expense should be distributed to all chapter Board members. Summaries are acceptable for chapter meeting reports.

Investments

Cash-flow projections should be used to identify all cash requirements and project opportunities. The chapter's investments should earn the maximum rate of return, based upon current market conditions. The Treasurer usually handles investments, at the direction of the chapter Board.

Investment Policy

Investment of funds is a major responsibility. The purpose of an investment policy is to indicate a conscious, formal effort by chapter officers to develop, implement and monitor the investment of all funds. The overall direction of a chapter's investment program may be found in the following objectives, which have been prioritized and explained to clearly identify expected results.

- Safety of principal is considered of greatest priority. Each investment made shall ensure that capital losses are avoided, whether from securities defaults or erosion of market values.

- Liquidity is considered the next important priority. The investment portfolio should remain sufficiently liquid to enable a chapter to meet all operating requirements that may be reasonably anticipated. Where long-term, safe investments can be made, no more than 50% of the total portfolio will be allowed for this type of purchase. Long-term is defined as 120 days or more.

- Maximum rate of return: A chapter's investment portfolio shall be designed with the purpose of regularly exceeding the average return of three-month U.S. Treasury Bills. The investment program shall seek to augment returns above this threshold, consistent with risk limitations identified herein and prudent investment principles.

- Diversification: To further guarantee asset safety, chapter officers shall diversify investments to avoid incurring unreasonable risks from the practice of concentrating investments in specific security types, industry types, fund types, etc.

- Member confidence in the investment program is imperative. Chapters should avoid any transaction that might impair its members' confidence. Investments shall be made with judgment and care, under the then prevailing circumstances, which persons of prudence, discretion and intelligence exercise in the management of their own affairs. Emphasis is placed on the probable safety of capital rather than the probable income to be derived.

- Responsibility for the investment program is delegated to the Treasurer. The Treasurer shall seek investment guidance from the chapter's Executive Committee and Board. The Treasurer shall direct investment program operations consistent with this policy.

Independent Audit
Chapters are encouraged to conduct a periodic independent audit or review. The chapter can designate either internal or external auditors to perform the audit. To save the cost of an independent auditor, chapter Board members can perform internal audits. A sample audit form is available.

Seed Money for New Chapters
ALA gives new chapters seed money that may be used to get chapter activities and educational programs underway. To receive the money, a chapter bank account must be established. Some banks require a taxpayer ID number before opening an account. Chapters must secure their own tax ID, which can be obtained directly from the IRS. You should contact your local IRS office or visit the IRS website to download the most current version of this form.

Additional Sources of Chapter Revenue
Depending on the number of members and program activities, each chapter must determine the amount of revenue necessary to meet its annual expense commitment. The addition of chapter dues provides a strong operating basis for the local chapter. Each chapter is urged to investigate ways to develop operating funds. With the availability of adequate local funding, chapters can send officers to conferences and training sessions such as ALA's Chapter Leadership Institute (CLI).

If the chapter elects to charge dues, it must determine the amount and frequency of payment (i.e. per meeting, quarter, year). In some cases, the dues are used to defray the cost of monthly luncheons or dinners and other chapter expenses. In some chapters, members pay the cost of events separately.

Other revenue-producing activities may include:

- Business partner sponsorship level packages
- Business partner appreciation days
- Fundraisers (golf tournaments, silent auctions)
- Seminars
- Special programs
- Co-sponsorship of educational programs
- Advertising in chapter newsletter
- Business partner seminars/exhibits
- Surveys

CHAPTER BENEFITS PROGRAM POLICY

Chapters should review ALA's Business Partner/Value in Partnership (VIP) Sponsored Member Benefits Program Policy and obtain written approval from ALA headquarters before entering into an agreement with a business partner. Chapters can secure approval when the proposed agreement for a member benefit program that complements and is not in competition with existing or proposed contracts of the Association. Current chapter benefit programs may be renewed with prior written approval from headquarters. Chapter leaders should refer business partners who are interested in establishing nationwide and/or international benefit programs to ALA headquarters.

ENDORSEMENTS

Neither the Association nor a chapter will endorse any business partner, products or services unless the Board of Directors of the international Association has granted prior approval.

JOB BANKS — LEGAL OPINION

ALA's legal counsel has reaffirmed the opinion titled "Guide for Operation of Placement Services by Chapters of Association of Legal Administrators."

LICENSE AGREEMENT

Chapters wishing to use the ALA logo on items other than letterhead or envelopes (such as clothing, jewelry, plaques, pen sets, coffee mugs, etc.) may be required to enter into a License Agreement with ALA, the owner of the logo. Chapters should contact *marketing@alanet.org* before ordering these items to determine if a written agreement is required. Whenever possible, verbal approval may be given.

Note: ALA has two different License Agreements — one for chapter websites and one for other products.

MUSIC LICENSING

A copyright law exists that requires that permission from a licensing agency be obtained for any music played at a conference or meeting. This applies to all music, whether taped or mechanical (i.e. radio, CDs, streaming services, video background music, etc.). It is the responsibility of each chapter to comply with the law when music will be played at any activity. The two major licensing agencies have begun to actively enforce this law, and they are filing lawsuits as a part of this enforcement.

ALA international is licensed with BMI (Broadcast Music, Inc.) and ASCAP (American Society of Composers, Authors and Publishers). However, each chapter is legally required to be licensed as well. The cost is minimal. To obtain the appropriate licenses, click on the links provided above.

Chapters should inform their business partners of this requirement if music is to be used as part of their booth, as the onus is on the business partners to comply separately.

THE VALUE OF A BUSINESS PARTNER RELATIONS PROGRAM

By including positive business partner relations as a chapter goal, the chapter recognizes the importance of business partner relationships to the individual, the chapter and the Association.

One goal of a business partner relations program is to develop a positive member approach to business partners and activities involving business partners. Another goal is to market the benefits of connecting with ALA members to the business partner community. ALA provides an important service to business partners by organizing opportunities for contact and exposure. In turn, business partners may supply much-needed support to chapter programs as well as the overall goals of the Association.

Educating Business Partners

There are many ways the chapter can educate business partners to assist them in making the most of their investment in ALA. Good education will improve the business partners' understanding of ALA and its members, increase their confidence in selling to our audience, strengthen their commitment to ALA and ultimately cement their decision to continue to support the chapter and ALA as a whole.

Education, however, is a two-way street. Ideas for educating chapter members about building solid relationships with the business partner community are available.

First, educate the business partners about the legal management profession and about ALA as a whole.

ALA Benefits	Share general information about the Association and the programs, products and services available to members.
ALA's Vision	Sharing this information helps to guide the development of programs, products and services. It also allows business partners the opportunity to gain a better understanding of Association objectives.
Organizational Structure	A listing of ALA chapter websites is available.
Business Partner Center	Become familiar with the many opportunities in the Business Partner Center. This is a valuable resource for business partners who want to reach beyond the chapter level of participation.

Next, educate business partners about the decision-making process in a law firm.

In most law offices, purchasing decisions are made by a group or committee, not just one individual. Because of this, the decision-making process can be lengthy as the group comes to a consensus. The responsibilities of administrators require acting as liaisons between firm or law department management and the business partner. Legal management professionals are invested in expediting a well-considered decision to further the firm's goals. Advise business partners to be patient with this process and share some or all the following points:

- Legal management professionals do rely on information from business partners. Whether a quick email message or a full-blown presentation, they appreciate the information.

- Business partners are best represented when they provide complete and accurate information about products or services. It is critical to rely on the information that is received.

- Sell not only the product, but also the service. It is important to share confidence that once the agreement is signed and the product is delivered there is adequate follow-through and support. This is true for equipment, supplies, software, etc.

Then, provide guidance about building relationships with the legal management professionals:

- **Make an appointment.** Do not drop by with the hope or expectation that the administrator is available. If you stop by without an appointment, it's best to drop off a business card and information for the receptionist to forward to the appropriate person.

- **Know your contact.** Rather than approach nondecision-makers in a firm (staff and lawyers) about using services and products, seek out the professional manager in the firm who is responsible for the decisions regarding a particular product or service. Decisions regarding the selection of a business partner are centralized in law firms and legal departments for efficiency and cost effectiveness.

- **Make a good first impression.** For example, a 10-minute meeting is set up with a business partner to make introductions. If the business partner shows up with three other people to take a tag-team approach, the administrator may now need to find a conference room and it could be awkward — it was unexpected. It is quite clearly going to be longer than a 10-minute meeting. If a business partner feels it is important to have others involved, whether it is the initial meeting or subsequent meetings, make those needs known to the administrator prior to arrival.

- **Relationships take time.** Approach each contact, each meeting, each phone call, each negotiation and each proposal as a partnership. Strive to develop long-term relationships — don't look for the quick sale.

- **Personal preferences.** Ask legal management professionals what they would like the next step to be and respect those wishes. Maybe the product or service is really a "hot item" right now, or perhaps there are a couple other things more pressing for the next two to three months. Ask how often the legal management professionals would like a follow-up courtesy call to check on the status of a proposal or see if the firm is ready to look more seriously at a product/service. Confirm the preferred method of communication (phone, email, mail). There are so many efficient ways to keep in touch — find out which works best.

- **Maintain contact.** Continue communications with the legal management professional until asked to contact someone else within the firm. In other words, don't go over the initial contact's head, including calling the managing partner to inquire on the status.

- **Talk about the trends in the legal industry.** Legal management professionals look to business partners to educate them about industry trends.

- **Service after the sale.** Highlight service advantages and the accessibility to business partner personnel who can resolve issues should they come up. Legal management professionals like to know that they will be taken care of once the deal is done and that they are not just left to a toll-free service number and the infamous voicemail nightmares.

- **Professional etiquette.** Concentrate on highlighting virtues and strengths and offer examples of how other professional organizations have benefited from a relationship with the business partner and the product or service. Do not speak poorly of your competitors.

- **Thoroughness.** Complete all items in the request for proposal (RFP). Incomplete responses create additional follow-up and waste time in the decision-making process.
- **Provide recommendations.** Offer references from other law firms. The legal community is large and vast, yet it is also very close and tight knit. Legal management professionals are a business partner's very best references. Be assured that when top-quality products or services are provided or when a business partner or their company goes the extra mile, legal management professionals will all know about it — everyone benefits!

- **The long-term connection.** Maintaining a positive relationship after an unsuccessful negotiation is also vital to all parties' success. The legal management professional may change firms or may become disappointed with the original selection. If there was a positive post-negotiation relationship, the legal management professional could come to you in the future. And, if a positive relationship is maintained in spite of a lost bid, the legal management professional may still become a good referral when the business partner calls upon other legal management professionals.

Connecting Business Partners with Members
Legal industry business partners are great resources. They know the market, their products or services, and where their products or services can help. To reach new audiences, business partners often turn to professional associations. Many business partners continue to support associations long after their name recognition and market share goals are achieved. This good faith reinforces their place in the market.

The best way we can reward business partners for their support is to continually find ways to connect them to the ALA membership. Business partners value face time more than anything.

The Association benefits from these relationships in many ways. Business partner support offsets the expense of providing high-quality education and network opportunities within a chapter. No chapter is too small for a business partner program — even business partners with a national focus find value at the chapter level.

Here are examples of some successful business partner opportunities developed by ALA chapters that help keep members and business partners connected.

Monthly Meeting Sponsorship
Invite sponsors to underwrite monthly chapter meetings. Invite the business partners to arrive before the meeting begins to enable them to meet and greet attendees as they arrive. Allow sponsors a few minutes at the podium to tell the members about their company and product or service. Some chapters try to coordinate the sponsor with the meeting topic.

Scholarship Fund
Some chapters award scholarships by way of drawings at special events or general meetings. Business partners who donate to a scholarship fund are invited to attend events or meetings and draw the winner(s). This gives the business partner an opportunity to meet the recipient in person. Ensure the business partner receives adequate recognition from the attendees. Consider giving the recipient a prepared thank you letter to send to the business partner. Thanking business partners is an important component to the success of such sponsorships.

Resource Directory/Survey/Business Partner Directory
The Resource Directory is a tool that some chapters publish. This directory surveys what services and products are being used within chapter members' firms. Advertisements in the directory can be sold to offset the cost of production. Advertisers supplying paid advertisements should be provided with a free copy of the directory. This directory can give business partners details about their competition and can elicit additional marketing ideas.

Business Partner Appreciation Event
Some chapters create events to recognize those business partners who have generously supported their chapter. Appreciation events are always popular. Consider holding a recognition party for the chapter's top contributors. Seek hotel or restaurant support to offset some or all the cost. Present recognition certificates to business partners during this event. Business partners are competitive and will try to be one of the "chosen" for this event.

Business Partner-Sponsored Education Program
Select one or two major sponsors for a half-day seminar or other special education session, such as a managing partner's breakfast, lunch or dinner or a managing partner panel. Offer the business partners an opportunity to display their products before or after the formal part of the program and include these sponsors in the lunch or cocktail hour. Invite them to have one representative at each table or to introduce the speaker.

Newsletters
Many chapters offset print or digital newsletter production and distribution costs by selling advertisements. The advertisers receive a copy of the newsletter/e-newsletter, which helps them keep current on chapter activities and hot topics. Be sure to review all advertisements carefully to ensure compliance to ALA's brand and their relationship to the chapter. Business partners should not refer to themselves as "members" nor should they suggest endorsement by ALA. Consider inviting specific business partners to contribute relevant and timely articles to the newsletter — they often have a wealth of knowledge to share.

Social Event
Business partners are always looking for an opportunity to network with chapter members. Social events lend themselves to this kind of interaction. These events can include a new member party, golf tournament, holiday party or some other type of social event.

Website
More than 80% of ALA's chapters have websites. There have been a number of different approaches to business partner participation and/or recognition on these sites. Some chapters sell links to the business partner's webpage and others sell tombstone ads on the website itself, bundling a link with one of the other opportunities listed above.

Joint Seminar with Bar Association
Consider organizing a one-day law office management seminar and exposition with a local bar association. Invite various business partners to set up a business partner exposition hall to showcase their products and services. Recruit business partners to give presentations at learning pavilions in the exhibit hall. This has an added benefit of raising the ALA's visibility with the local bar association.

Business Partner Educational Session/Forum
Work with your business partners to help them understand the legal industry and how best to sell to chapter members. Consider a program with a panel of legal management professionals or table talks to discuss relevant issues business partners need to understand regarding the decision-making process in a law firm. Following the program, consider hosting a cocktail party so that business partners and legal management professionals can network.

BUILD BETTER BUSINESS PARTNER RELATIONSHIPS

Keys to strong business partner relationships:

- Personal Interaction. Communicate honestly and personally with partners. Make a good first impression with the goal of developing long-term relationships. And show appreciation! At events, through social media connecting members to partners. Maintain a positive post-negotiation relationship. A business partner can be a vital ally for your chapter, you and your firm or for a colleague looking for a new product or service — make that connection!
- Chapter Interaction. Always remember our business partners are a key reason all levels of the Association can hold quality educational programs and events at a reasonable cost to our members. Clearly identify someone in your chapter to communicate with the business partners. Follow all the communication guidelines specified above.
- Develop understanding. Be sure to understand your business partners' marketing needs, objectives and budgets and then provide solutions to help them better access and engage with the ALA membership. Most business partners are looking to build their brand, expand their visibility, network, build relationships and showcase their thought leadership. Make sure your business partner program addresses the changing needs of your business partners and provides value that supports them and our members.
- Share with the business partners. Business partners spend a lot of time determining the return on investment (ROI) they get from ALA. Share materials, information and opportunities. If you know of a business partner who is a quality speaker, consider using or recommending them to provide education at the chapter level.

Most of all, be consistent. Keep the rules of engagement the same for everyone. For more information on chapter business partner programs, review the business partner page in the Chapter Resource Hub.