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to knowledge, resources and networking

TO: Oliver Yandle

FROM: Region 4 Leadership Team

DATE: March 20, 2017

RE: 2017/18 Plan of Work for Region 4 Leadership Team

The Region 4 Plan of Work ("the Plan") for 2017/18 will continue to focus on leadership, chapter related activities, member engagement, increased communication, and aligning our Plan with the five main goals of the Association's 2017 – 2020 Strategic Plan: Define our Identity, Increase Member and Business Partner Value, Enhance Industry Thought Leadership, Advance Legal Management Professional Development, and Build Community and Engagement. This Plan is a collaborative effort and a living document that will evolve as the strategic plan process unfolds and the needs of our Region 4 members change.

Team Members – The Region 4 Team ("the Team") is excited to welcome a new Director, Mike Bumgarner, CLM, CPA (independent member from West Virginia) and two Regional Representatives: DeAnna Lopez, CLM, SPHR, SHRM-SCP (Houston Chapter), and Tim McKay, CPA (Fort Worth Chapter). They will join James Cornell, Region 4 Director (Austin Chapter), and our returning Regional Representative, Candace Childress (Houston Chapter). The Team wishes to express its deep and sincere gratitude to Mark Bridgeman, CLM, CRM (Wisconsin and Chicago Chapters), Karie Rivkin (Austin Chapter), and Stephen Wolf, CLM, CPA (New Orleans Chapter), for their excellent service, countless contributions, and passion for ALA and its members. We are a better team and region as a result of their time and energy over the last two years.

Goal #1 – Define our Identity As the legal management profession changes and evolves, ALA must clearly define our role, membership, and leadership in the legal industry in order to remain a relevant and vital organization. A defined identity will provide our Association's leadership and staff with a specific lens with which to focus existing programs and new initiatives, bringing to light critical information, such as:

- How members view our Association (currently and in the future), along with its purpose;
- How ALA compares to, and competes with, other associations;
- Clear understanding and articulation of brand attributes, values, and desired positioning;
- Alignment with current and future needs of the legal industry; and

- Perspective and impact relative to the words and concepts "administrator" and "association".

The Team believes this is an important initiative to consider at all levels of ALA, and we will actively seek and gather information from our Region 4 chapters to better understand our members' perspective, needs, and values.

The Team will strive to routinely meet with chapter leaders (President and President-Elect) by telephone, video conference, or in person to review the performance objectives of the President's Award of Excellence Program. We will develop a timeline to assist both our regional and chapter leaders with this effort. Our hope is that 100% of our chapters will formally submit for the award.

Goal #2 – Increase Member and Business Partner Value – Develop relevant, actionable, timely, responsive resources to increase value of ALA to members, business partners, and other legal management professionals.

In order for our chapters to be fully satisfied by the support the Team offers, we believe it is extremely important that our chapter outreach is consistent and brings a high level of communication, transparency, and value to our chapter leaders and members.

The Team will work on assisting chapter leaders with sharing information from Region 4 (and other regions, too) as well as the Association, because we believe this is an area that varies greatly from chapter to chapter. We will also focus efforts on chapter activities, such as mentor programs, leadership development, succession and strategic planning, and chapter management by providing examples from successful programs and initiatives within the Association. Examples include successful small chapter management, development and distribution of a comprehensive Communication Plan and Timeline (with upcoming deadlines), team calls, and outreach to chapter leaders. The Team will also help promote our Chapter's and the Association's Business Partners by encouraging our members to reach out to them as a resource for educational programs, product innovations, member recruitment, and other valuable information.

Goal #3 – Enhance Industry Thought Leadership – Become recognized as a thought leader in the legal industry by conducting critical industry research and developing new ideas, innovations, and solutions to guide the legal management industry.

In addition to highlighting and promoting the new products and services launched in 2016, we will highlight exciting options unveiled by the Association in 2017. We hope to capitalize on these options as ways that we can show value in membership. Additionally, we will work to create a Chapter to Chapter Mentoring Program, as well as continue to produce the quarterly Region 4 Newsletter.

Goal #4 – Advance Legal Management Professional Development – Advance the knowledge, skills, and leadership of legal management professionals and strengthen the role of legal management professionals in the legal industry.

We want to promote change management, improve communications, and assist in identifying and retaining the best leadership for ALA. We believe the keys to highly engaged members are opportunity and encouragement. We hope to encourage the Region 4 membership to seek opportunities for involvement by volunteering in Regional and Association positions, improving chapter relations, and sharing information obtained from chapters in Region 4, and the Team. This effort will involve the Region's numerous independent members.

The Team will also focus on professional development through promotion of the online e-learning opportunities that ALA offers along with the Legal Management Specialist Certificates. These opportunities allow members to increase professional standing by demonstrating their knowledge and capabilities in some of the most crucial areas of law firm management, finance and human resources.

We are also working with the Certification Committee to create a Certified Legal Manager Ambassador Program for the CLM certification. This program will emphasize the benefits of studying for the exam as a means of growing a legal management professional skill set, and obtaining a more comprehensive understanding of the business of law, and not necessarily only focusing on passing the exam.

Goal #5 – Build Community and Engagement – Build a stronger sense of community and shared purpose, and increase engagement among members, chapters, business partners, and other stakeholders.

In 2017, the Team will continue to make a concerted effort to engage the Association's Independent Members in Region 4. This initiative may be even more critical given the possible bylaw changes that move voting on amendments to the bylaws from chapter presidents to individual members. We want to provide our independent members with a voice and believe that the Team is well suited to do this. Additionally, we hope to share knowledge, and discuss best practices on various topics. We are in the process of developing a survey directed at independent members that will allow us to gather information and better understand their needs and the ways we can best serve them.

Summary:

The Team believes our Plan is comprehensive and consistent with increasing communication, assisting chapter leaders in understanding the positive change in the Association, and maintaining the continuity of the Association's Strategic Plan. We will focus on our main goal of providing Region 4 chapter leaders with the tools and resources they need to be successful, so they can provide their best services to the membership at-large.

We will develop trainings for new directors or officers on boards that will include live training or video/webinar of a mock board to show ways to deal with conflict, agenda language and proper follow up so that action items aren't forgotten. We will include information on budgets, cash flow statements, and model bylaws.

Technology is an important aspect of chapter management and we will demonstrate the technology available to chapters for presenting meetings, the resources available at ALA Headquarters to assist chapters and members for developing websites, social media, broadcasting meetings/sessions, and perhaps incorporating some online webinars in addition to or in place of live meetings as a way to assist chapters in providing education to their members at lower cost. We will also work on a technology column in our Region 4 newsletter where we would feature chapters successfully utilizing technology.

We greatly appreciate the value and ideas that are shared in the Idea Exchanges at the Annual Conferences. We would like to develop a program that is not region specific to unite chapters of similar size and encourage collaboration to discuss issues for best practices, mentorship, resource allocation, and utilization. We realize that we have the ALA Online Communities for this, however, we feel that we could be doing more to promote this and make more personal introductions and connections.

With a focus on more and better communication, the Region 4 newsletter will continue to be a tool to explain our roles and the Association's composition at higher levels. We believe this newsletter will help us communicate more consistently, efficiently and effectively the news of our Region and Association.

We welcome your comments, thoughts and/or any recommendations that will improve this Plan. Thank you for being members of the Association of Legal Administrators.

2017 – 2018 Region 4 Timeline

Task	**Date/Location**	**Team Member**
Attend Association Leadership Institute ("ALI")	February 17 – 18, 2017 Chicago, IL	Directors & Regional Representatives
Call for Nominations/Applications for Regional Nominating and Association Nominating Committees	Deadline will be announced in May	Directors & Regional Representatives
Monthly Region 4 Team Conference Calls	Currently 2nd Thursday of the month at 10:00 am CT	Directors & Regional Representatives
New Chapter Presidents Call with Region 4 Team	Conference calls with all new presidents in Region 4 ahead of Regional Council Meeting at Annual Conference – March	Directors & Regional Representatives
Quarterly Communications to All Region 4 Members via Newsletter	March/July/November/February	Directors & Regional Representatives
Communication with Focus Chapters	Monthly or Bi-Monthly	Directors/Regional Representatives
Association Board of Directors Meetings	April 1 and 6, 2017 Denver, CO	Directors
Attend Region 4 Council Meeting at Annual Conference – **All Region 4 Attendees Welcome!**	April 5, 2017 11:30 am – 12:30 pm, Room CCC 704 Denver, CO	Directors & Regional Representatives
Plan & Conduct Chapter Visits	May 2017 – April 2018	Directors & Regional Representatives
Attend Chapter Leadership Institute ("CLI")	July 20 - 22, 2017 Minneapolis, MN	Directors & Regional Representatives
Submit Focus Chapter Reports	Deadline will be after CLI To Nicole Larson	Directors/Regional Representatives

Accept Nominations for Region 4 Outstanding Volunteer Award Choose Recipient, Order Award and Presentation	July 31 September-October	Director Directors & Regional Representatives
Large Firm Principal Administrators Retreat	August 3 – 5, 2017 Westin Boston Waterfront Hotel, Boston, MA	
Association Board of Directors Meetings	August 11 – 12, 2017 Chicago, IL	Directors
Board of Directors Calls to Chapter Presidents	August-October Summaries due October	Directors
Regional Legal Management Conferences	West – Regions 4, 5 & 6, Las Vegas, September 7 – 9, 2017 East – Regions 1, 2 & 3, Nashville, TN, October 12 – 14, 2017	Directors and Regional Representatives
Specialty Conferences – Finance, HR and IP	October 5 – 7, 2017 Palmer House, Chicago, IL	
Association Board of Directors Meetings	November 3 – 4, 2017 Chicago, IL	Directors