2017 Plan of Work: Region 5

Region 5 Leadership Team (the "Team") Members:

April Campbell, Region 5 Director (outgoing)
Lori Hughes, Region 5 Director (incoming)
Mark Bridgeman, At-Large Director (outgoing)
Julie Logan, At-Large Director (incoming)
Maria Mason, Regional Representative
Laura McCambley, Regional Representative (outgoing)
Barb Paige, Regional Representative
Lisa Sterritt, Regional Representative (incoming)

Region 5 consists of the following chapters:

Alaska	Hawaii
Big Sky	Idaho
Calgary	Oregon
Edmonton	Puget Sound

The Team consists of the Region 5 Director, an At-Large Director, and three Regional Representatives. In April 2017, Mark Bridgeman and Laura McCambley complete their terms and Julie Logan begins her assignment as Region 5/6 At-Large Director and Lisa Sterritt begins her two-year term as Regional Representative. The incoming and outgoing members of the Team will assist in the development of the 2017 Region 5 Plan of Work (the "Plan").

The Plan provides a framework and focus for the Team that captures the year's priorities, goals, and tasks in addition to aligning the Team and its work with the organization's strategic plan and goals.

Association Strategic Goals:

- Define our Identity
- Increase Member and Business Partner Value
- Enhance Industry Thought Leadership
- Advance Legal Management Professional Development
- Building Community and Engagement

The Team will continue to improve upon its connections with its chapters and develop and improve upon connections with the large amount of independent members in

Region 5. The Regional Representatives and the At-Large Director each have been assigned a chapter or group of Region 5 members to support and mentor as the chapter or group liaison. The following focus chapters and member group assignments have been made for 2017:

Alaska - Barb	Hawaii - Lisa
Big Sky - Barb	Idaho - Maria
Calgary - Barb	Oregon - Lisa
Edmonton - Maria	Puget Sound - Julie
Independent Members - Maria	

The Team will continue to address and enhance the key items from last year's plan in the areas of:

- Building Trust With Chapter Leaders
- Regional Member Outreach – through a defined communication plan and the Region 5 Social Event at annual conference
- Region 5 Outstanding Volunteer Award

and will incorporate those overarching areas to support this year's goals. The Team has identified the following goals and tasks to support the chapters and independent members within Region 5 and to assist in meeting the association's strategic goals:

Define our Identity

The beginning of this year will start the focus on the association's **Goal #1 – Define our Identity**. It will be important for the Team to keep a steady flow of information to the presidents within the region, the chapter members, and the independent members regarding the goal and bring comments and feedback back to the Team. Initial information will be provided to the Team at the Association Leadership Institute in February, with additional touch points being made during chapter meetings, at annual conference, the Chapter Leadership Institute, and as determined in the future. In order to define our identity, we want to touch on as many members as possible in order to involve them in the process. Member feedback is crucial.

Chapter Activities

Building Trust with Chapter Leaders. In a continuing effort to effectively support the chapters in our region, the Team has decided that building trust and rapport with each of the chapter leaders is essential. The Team's approach for establishing relationships with the new and current chapter leaders is to have in-depth transition calls with the President and President-Elect (and any other interested chapter leaders) of each chapter, along with the Team liaisons (incoming and outgoing) and either the Region 5 Director or the At-Large Director. The Region 5 Director is not assigned a focus chapter so that she may be available to help all of the chapters in the region and not just focus on one.

Chapter Visits. Over the last year chapter visits took place with Alaska, Calgary, Edmonton, Oregon, and Puget Sound. Hawaii was budgeted for the 2017-18 year, along with Big Sky and Idaho. The Team continues to be open to evaluating any other chapters that request a visit.

Regional Member Outreach

Communication Plan. Continuing in 2017, regular e-mail will be sent to all regional members from the Region 5 Director, focusing on information specific to Region 5 members and will include information that is not merely a repeat of information the members are already receiving from ALA Headquarters. Topics for each e-mail will be discussed during monthly Team calls and then the Region 5 Director will send the e-mails to the regional members within one week of the Team call.

Region 5 Get Together at Annual Conference. The Team will continue the tradition of hosting a Region 5 Get Together at Annual Conference. Region 5 is one of the only regions to hold such an event, and it has been well received by regional members and provides a rare opportunity for regional members to meet and socialize.

Even though this event has occurred every year at the Annual Conference, the Team would like to ensure that this event is a time to create connections among our regional members. "Save the date" invitations will be sent to every new Region 5 member that registers for the conference and we will make a strong effort to secure a venue and menu to keep the cost per person as low as possible in hopes of garnering high participation. Last year's event had extremely high attendance and we are striving for the same result in 2017. We will encourage participation from independent members in hopes that we can create personal connections with them during this event. The Team will encourage Region 5 event attendees to volunteer to be on the planning committee for this event in the future.

Independent Members. With the assignment of a Team member to the Independent Members as a group in 2016 and continuing that in 2017, further development of outreach efforts, in-person connections while at annual conference, e-mail group or discussion forum for independent members, or other methods to engage the large group of independent members we have in Region 5. Further discussion and investigation of a group call, blog, or e-mail, specifically for regional independent members, will take place with the Region 5 Representative assigned to Independent Members as the coordinator of this communication.

CLM Ambassador. The Team will examine and develop options for a CLM Ambassador outreach program with the chapters. The ambassador is a spokesperson for the CLM program, gain insight from members on interest and need within the Region. This year, the Team has several CLM Team members who will work in a group effort to develop these methods of contact and outreach.

Adopt-A-Chapter. The Team will discuss with chapters in the region whether there are opportunities for larger chapters, with diverse programs, to share or interconnect with

smaller chapters that have limited budgets and few programs, to enhance engagement and interest to elevate members and their firms.

Region 5 Outstanding Volunteer Award

The Team will discuss potential recipients of for the 2017 Region 5 Outstanding Volunteer Award. This award may not be given each year. If it is determined that there is an appropriate recipient, the venue of the announcement and presentation to the recipient will be determined and may depend on the conference attendance of the recipient or coordination during a chapter visit.