

# CLM Approved Provider Program Guide

## **CLM Approved Provider Program Guide**

The Certified Legal Manager (CLM)<sup>®</sup> Approved Provider program was established to create a clear system for Association of Legal Administrators (ALA) chapters and other organizations to identify courses that qualify for application and recertification credit for the CLM certification program. Note that chapters and other entities that offer high-quality education for legal managers will be referred to under the umbrella term “organizations” within this guide.

### **What Is a CLM Approved Provider?**

A CLM Approved Provider is an organization that is approved to offer and publicize education programs that are eligible for CLM education credit. The CLM Approved Provider program is designed to provide access to high-quality legal management educational opportunities through ALA chapters and other organizations. As a participant in the program, an organization will have the opportunity to offer education programs eligible for CLM credit for a one-year period without preapproval by ALA national headquarters.

### **Are ALA Chapters Required to Become CLM Approved Providers?**

ALA chapters are not required to become CLM Approved Providers. However, if an ALA chapter wants to be able to advertise its education sessions as being eligible for specific CLM credit after 2018, it must become a CLM Approved Provider.

There will be a one-year transition period for the year 2018. In 2018, ALA chapters may advertise an education program as being eligible for specific CLM credit after ALA reviews information about the program and gives its approval. After 2018, only CLM Approved Providers may advertise their education programs as qualifying for CLM credit.

### **Key Benefits to Being a CLM Approved Provider**

- CLM Approved Providers can award CLM application and recertification credits for education programs without ALA headquarters preapproval.
- CLM Approved Providers can market their education opportunities using the CLM Approved Provider seal.
- CLM Approved Providers will be included in a list of approved providers on the ALA website.

## **Qualifications Required for CLM Approved Provider Programs**

Organizations must agree to meet the following qualifications that contribute to quality education offerings:

1. Programs offering CLM credit must meet all the education criteria described in the Certification Program Information and Application Packet. Criteria for education programs is also described in the next section. See the Certification Program Information and Application Packet for additional criteria for webinars and self-study programs.
2. Provider must designate a contact person who will be responsible for ensuring compliance with all program requirements. ALA must be notified when a designated contact person changes. Every designated contact person must complete online provider training.
3. Provider must have the resources, facilities and administrative support to effectively deliver CLM-related programming.
4. Provider must offer appropriate high-quality programming tied to the Principal Administrator Knowledge, Skills and Ability (KSA) Ratings. They can be found under the title Competencies of Legal Administrators on ALA's website.
5. Each presenter/instructor must have proven expertise in the field and the ability to facilitate learning.
6. Each program offering must describe the content of the program and must include clearly identified learning objectives.
7. Promotions must comply with the guidelines for using the CLM Approved Provider Seal and for accurately stating the CLM credit that applies to each education program.
8. Provider must have a participant evaluation process in place and utilize feedback to ensure continuous improvement in program content and quality.

## **Criteria for CLM Application and Recertification Education**

1. Educational programs must be intended and designed to maintain or increase the professional competence of legal managers.
2. The program must be an organized continuing education experience under responsible sponsorship, capable direction and qualified instruction.
3. All education courses or sessions must be at least one (1) hour in length and include no more than 10 minutes of introductory remarks, breaks or other non-instructional activity.
4. The program must have a course description that includes learning objectives.
5. The following are not eligible for CLM credit: Social activities, business meetings, chapter meetings, roundtable discussions, idea exchanges and product-specific presentations intended to promote a product or service.

## Awarding CLM Education Credit to Programs

1. CLM Approved Providers must award the appropriate amount of CLM credit for individual offerings. Credit is awarded based on the actual educational time spent in the program. CLM credit is calculated in 15-minute increments. Each 15-minute increment = .25 or one quarter of one hour.  
Examples:
  - 1-hour educational program = 1 hour of CLM Credit
  - 1-hour and 15-minute session = 1.25 hours of CLM Credit
  - 120 Minutes = 2 hours of CLM Credit
2. Individual sessions for a multi-session program must adhere to the same guidelines and list the CLM accreditation for individual sessions separately.
3. Organizations must comply with any verification requests conducted by ALA headquarters and retain program documentation for a minimum of two years. (See Audits section).
4. There is no requirement to provide a sign-in sheet for live program participants.

## Using the CLM Approved Provider Seal and Accurately Stating the CLM Credit That Applies

1. Providers must follow seal usage guidelines when using the CLM Approved Provider Seal in any promotion.
2. CLM credit for programs must be stated using the following formats:

**\*CLM<sup>®</sup> Application Credit:** [X] hour in the category of [XX] (XX = One of the five Management Categories).

*These are: Writing Skills, Communication Skills, Self-Management Skills, Information Technology and Organizational Development. Examples of these topics can be found in the Certification Program Information and Application Packet.*

*Note that sessions may not qualify for CLM Application Credit.*

**CLM<sup>®</sup> Application Credit for Functional Specialists:** [X] hour in the subject area of [XX] toward the additional hours required of some Functional Specialists to fulfill the CLM application requirements. (XX = One of the four main subject areas in the Content Outline for the Body of Knowledge).

*These are: Financial Management, Human Resources Management, Legal Industry/Business Management and Operations Management.*

*Communications and Organizational Management sessions do not provide application credit for Functional Specialists.*

**CLM<sup>®</sup> Recertification Credit:** [X] hour in the subect area of [XX]. (XX = One of the five main subject areas in the list of Principal Administrator KSA Ratings.

*These are: Communication and Organizational Management, Financial Management, Human Resources Management, Legal Industry/Business Management and Operations Management.*

### **Application Process:**

Applications will be accepted throughout the year but provider status ends on December 31 each year. Please read and understand the entire CLM Approved Provider Application and determine if your educational events meet the guidelines and responsibilities of the CLM Approved Provider Program.

An ALA chapter or other organization applying for CLM Approved Provider status:

1. Must complete an online application.
2. Will be notified via an email to its designated contact person of provisional approval subject to the designated contact person completing provider training.

Once the application is fully approved, the designated contact person will receive specific program information, including:

1. The official approval term dates. ALA will award provider status on a calendar year basis: January 1 through December 31.
2. CLM Approved Provider seal to be used on brochures and other marketing materials.

### **Approval Process**

Applications are reviewed and processed within 30 days of receipt of application. ALA will notify applicant of status and provide them with access to Approved Provider training once approved.

### **Audits**

ALA reserves the right to randomly audit CLM Approved Providers to ensure compliance with the established criteria. If audited, ALA may request to review a CLM Approved Provider's program records, including but not limited to marketing materials, program materials, attendee lists, evaluation reports, and facilitator's credentials.

### **CLM Approved Provider Fees**

The CLM Approved Provider Program is offered at no cost to ALA chapters. Other organizations must submit a non-refundable fee of \$199 with their application. The \$199 fee applies to initial and renewal applications.

## Approved Provider Renewal

To continue participation in the CLM Approved Provider program, providers must submit a renewal application each new calendar year along with a list of education programs completed in the previous year.

## CONTACT US

Submit all provider applications and fees online at  
*[www.alanet.org/education/certification/clm-credit-approved-provider-program](http://www.alanet.org/education/certification/clm-credit-approved-provider-program)*

For questions regarding the ALA CLM Approved Provider Program please contact us at:

Association of Legal Administrators  
Certification Department  
[certification@alanet.org](mailto:certification@alanet.org)