ALA® Association of Legal Administrators

Chapter Education Planning and Reporting:
A Guide for Chapter Education Chairs and Chapter Presidents

This guide is intended to assist you in reporting your Chapter Education results to ALA in an easy and informative way. It may also help you make interesting and fun recommendations for chapter education sessions.

Planning Chapter Education Sessions

Programming Sources
Developing and delivering programs and products that provide high quality, competency-based education can be challenging.

Please consider using the following resources to make session planning easier:

- Business Partners – They are always interested in speaking on a related topic, just make sure the session is educational in nature, timed appropriately for your audience and not a sales pitch! Ask for the agenda before the session to confirm.

- Consider offering a session "Series" each year. A series will keep members coming back for more! For instance, the First State Chapter offered a Disaster Recovery Series: Part 1 – Insurance Aspects; Part 2 – Business Continuity; Part 3 – Experiential Aspects. Other possible "Series" ideas are Finance (budgeting, understanding financial statements, alternative fee arrangements); Real Estate (lease negotiation, space planning, office move facilitation); leadership; IT (hardware considerations, new software/technology, best training practices), etc.

- Build relationships with and tap into other legal organizations, professional groups and ALA strategic partners:

  o ILTA (International Legal Technology Association)
  o AAAL (American Law Library Association)
  o ARMA (American Records Management Association.)
  o LMA (Legal Marketing Association)
  o NALP (National Association of Law Placement)
  o ABA (American Bar Association)
  o SHRM (Society for Human Resources Management)
  o Local CPA (Certified Public Accountant) Societies

- ALA Webinars

- Local Universities

- Regional Representatives, Chapter Members – There are many talented members who are willing to present on a topic of expertise!

- ALA Committees

- Insurance Consultants

- Small Business Association

- [Online Learning](#) page of the ALA website

- ALA Research Center

- ALA toolkits

Browse the various [Online Communities](#) to see what members from across the country are curious and chatting about. Use what you learn as the springboard for a lively roundtable discussion! Members love to share concerns in a roundtable forum.

Seminar brochures. Don't just toss them when you get them–they are a good source of session inspiration!

Committee Help
Don't feel like you have to do everything yourself!

Below is a good approach to use at the beginning of each education season:

Plan an Education Committee meeting. At the meeting, ask for volunteers to take charge of each of the five ALA competency areas (CM, FM, HR, LI, OM) and assign the remaining areas to others.

Ask each to submit at least three topics within the assigned category by the next Committee meeting. Note that meetings can be held via a teleconference to make it easier for attendees and overcome the resistance to participation. Emphasize the sense of pride and accomplishment each member will feel at the conclusion of a wonderful program!

As a Committee, choose the sessions you believe will have the broadest appeal to your members

Delegate the planning tasks to your Committee members.

Stay Organized!
Create a summary of the sessions offered (sample below) each month and include an "evaluation score" and number of attendees for each speaker. As an example:

2018 Wonderful Chapter Program Schedule							
Date of Session	Category	Session Name and Presenter	Meeting Coordinator	Venue	Details Confirmed	# of Attendees/ Evaluations	Evaluation Score
1/10/2018	Human Resources	Employment Law Update Jane Jones of DC&H	Joe Smith	DC&H 1234 Main Street 9th Flr.	Yes. Speaker requires a PC and overhead projector.	25/24	3.85
02/07/2018	Operations Mgt.	Disaster Recovery, Part 1 - Insurance Aspects A+ Insurance	Joe Smith	CBL&H, 555 Market Street, 8th Flr.	Yes. Speaker asked that the host firm copy the handouts.	30/31	3.72

May 3-6, 2018, Annual Conference and Exposition, National Harbor, MD
September 13-15, 2018, Regional Legal Management Conference, Chicago, IL
Note: The ALA Board of Directors has established a 60-Day Window Policy, which sets specific parameters regarding the timing of chapter events in relation to events hosted by the international organization.

Not only will this make reporting to your Board and ALA Headquarters easier, but you can provide a summary of this document when you are demonstrating to new members that Chapter meetings are a good resource for education and networking. Additionally, the Presidents' Award of Excellence includes Professional Development criteria. Keeping track of your sessions will make completing that section of your Chapter's entry a snap! You also will be able to easily see if you are offering sessions in the required Areas of Knowledge: Communications and General Management, Financial Management, Human Resources Management, Legal Industry, and Office Operations Management.

Post the session schedule on your chapter's website and provide a copy to chapter members at each monthly meeting. It's a good idea to also include the Annual Conference and Regional Legal Management Conferences on this summary. It will serve as a reminder for people to plan to attend!

ALA's *Volunteer Handbook* and the chapter education section of the website are valuable resources as well. Note: You will need to log in with your specific user name and password, or you will receive an error message.

Getting Feedback
Make sure you bring session evaluation forms with you to each chapter meeting. Make it easy for participants to complete the evaluation forms by pre-populating certain information like the program date, session title, and speaker name. A copy of the Individual Session Evaluation Form is available here.

Reporting Education Sessions to ALA Headquarters
Please use the Chapter Education Summary Form to report statistical information about your meeting to ALA Headquarters. Your information will then be recorded in a database which is a great resource for other chapters. The database summarizes education activities; it serves as an exchange for programming ideas and tracks which programs were the most successful and well-received.

The session summary forms, criteria, as well as the evaluations forms can be located at
http://www.alanet.org/membership/chapters/chapter-leader-resources/chapter-education#evaluation.

Keep a Binder
Keep a binder, tabbed by each education session the chapter offered. In each tab, compile all documents related to the presentation–planning notes and emails, invitations, session handouts, session evaluation forms, post presentation correspondence, etc. This will make it easy for you to write a summary and pull together related documents when applying for recognition in ALA's IDEA Awards program.

We hope you find this guide to be a useful tool. If you have anything that you would like to add or if we can assist you in any way, please call or email your Regional Representative or Regional Director.