



Membership Development Toolkit

ALA Membership Development Committee
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INTRODUCTION

The Association of Legal Administrators (ALA) plays an essential role in the business of law. ALA provides members with ongoing professional development, continuing education and networking opportunities. Like all professional associations, however, we are continually challenged with an ever-evolving industry and the need to identify, understand and deliver the support our members want and need.

This chapter membership toolkit has been created to do just that. The information referenced herein is the result of multiple surveys, telephone calls, personal experiences and idea exchanges among chapter leaders and members of the Membership Development Committee (MDC). Our goal in developing this toolkit is to share best practices and inspire chapter leaders to bolster membership growth and increase engagement in new and creative ways. If what you read sparks even one new idea that helps your chapter grow, we will have been successful.

Membership is not just about recruiting new members; it is a partnership with other departments to ensure that member wants and needs are being addressed. Robust educational programming, training, networking opportunities and resources are what make it attractive for someone to join a chapter. Fresh programs and content, recognition, volunteer and leadership opportunities, and a willingness to listen to members will keep them renewing their membership year after year. Chapter leaders working on membership will be a part of the whole experience for members and, thus, they must work together with other divisions to help drive a positive member experience.

Our hope is that this document and the accompanying tools and worksheets benefit your chapter. The Membership Development Committee is pleased to present the ALA ROAD map of the chapter membership experience: **Recruiting, Onboarding, Assimilation & Engagement, and Departing Members.**

OVERVIEW

I. JOINING ALA

ALA membership is open to professionals actively engaged or interested in the business of law. Student membership is also available for those individuals currently enrolled in any degree program and considering a career in the legal industry. You may review [member eligibility guidelines](#) on the ALA website for more detailed information. Please note that an individual must become an ALA member *before* they are eligible for chapter membership.

The appropriate chapter president (or designee) will be notified when an individual applies for ALA membership. The chapter is then responsible for reaching out to the new ALA member and sharing information about the benefits of joining the local chapter. After the individual joins the chapter, the chapter president (or designee) informs ALA's membership staff by contacting them at membership@alanet.org or 847-267-1585. ALA members who are not part of a chapter are considered independent members.

II. RECRUITMENT

Chapter leaders are encouraged to actively recruit and welcome professionals employed or interested in the business of law. Prospective members can typically be found in law firms, bar associations, in-house legal departments, educational institutions and legal departments of government agencies. While the highest percentage of current members hold generalist job titles, such as firm administrator or office manager, chapters are encouraged to expand their target audience to include legal professionals with more specialized responsibilities, such as IT, human resources, finance and marketing. Each of these individuals can derive value and benefits from joining and participating in ALA alongside other role-specific industry associations.

Additional sources of potential chapter members include current ALA independent members not affiliated with a local chapter, individuals who have let their membership lapse and members of the Cyber Chapter who may be looking to connect at the local level. ALA's membership department distributes a list of ALA members in each chapter's area who are considered independent members. This information enables chapters to identify and target potential new members.

III. ONBOARDING AND ORIENTATION

A successful orientation and onboarding process will help get your new members off to a strong start within your chapter. New members who connect with other members and understand the benefits offered will be the most likely to engage with your chapter and renew their membership year after year. New member checklists are an important part of the onboarding process, ensuring that all bases are covered. Each chapter should create its own checklist that includes tasks such as sending welcome letters/emails, assigning peer advisers or mentors, confirming new members are receiving chapter communications, speaking with new members to understand what they hope to gain from their membership and inviting new members to a welcome event. Taking these steps will allow the chapter to make a great impression at the outset, increasing the likelihood of renewed membership in the years to come.

Orientation is a step in the onboarding process. Your orientation program, whether in-person or virtual, should cover specific details relevant to a new member's experience with the chapter. This step may be very transactional and cover things like how to log in to the members-only website, how to register for events, a summary of upcoming events and an introduction to the chapter's rules and expectations for the member. The broader onboarding process is akin to a handoff of the new member to other parts of the chapter's activities and should seek to introduce the new member to the chapter culture.

IV. ASSIMILATION AND ENGAGEMENT

Keeping members engaged through program offerings that foster professional growth will help bolster membership renewals. While some membership attrition is outside of your control (e.g. economic downturn or retirement), there are many ways to keep membership numbers consistent. The chapters with the highest levels of engagement are those that communicate with their membership frequently. What do your members want from your

chapter? Are you regularly reaching out through informal conversations or formal surveys to understand what interests your membership — and then catering to meet those needs?

Many members are largely unaware of the variety of product and service offerings available to them through both their ALA membership and their chapter membership. Simply sharing this information with members upon their initial enrollments in the organizations is not enough. Chapters must continue to develop and implement new ways to increase awareness of the value of membership over the course of a member's legal management career.

It is much easier to retain a current member than to bring in a new one. Therefore, two-way communication with your members is critical. Understanding what your members want and then fulfilling their expectations will keep your chapter vibrant. If you can maintain your base and continue to bring in new members, your local chapter (and the Association) will flourish for years to come.

V. DEPARTURE

A lack of understanding about why an individual chooses not to renew their membership leaves a lot of important information on the table. Chapters should strongly consider some sort of outreach to departing members to understand their reason(s) for not renewing. Regardless of how you choose to collect this information, the goal should be threefold: first, to understand why the departure is happening; second, to learn what the chapter can do to improve its value or the perception of that value; and third, in the event of a career change, to determine if there is a successor to the departing member.

TOOLS AND IDEAS

I. Recruiting Chapter Members

A. Identifying Target Audiences and Increasing Visibility

Increasing the visibility of your chapter within your local community is key to membership recruitment. Heightening awareness of your chapter is a good way to attract new members. Chapters have successfully done this in a variety of ways, including advertising in local law and business magazines, having chapter leaders speak at local community engagements, actively participating in local bar associations and using social media. ALA assists with messaging and ideas to help leverage the chapter's social media platforms. You can also collaborate with other legal groups and business partners on community service projects. Finally, consider reaching out to the entire legal community when hosting large events such as educational expos.

Appended to this toolkit you will find a Target Audience Worksheet designed to assist with your efforts to identify sources of prospective members. [Appendix A]

B. Recruiting Materials

As you ramp up your recruiting efforts, you may want to have attractive, professional materials that cover the benefits of ALA membership and what your chapter has to offer. The

tool your chapter chooses could be as simple as an email template or as elaborate as a printed brochure. The key is to include information on the benefits associated with ALA membership.

Additionally, there is a printable brochure regarding ALA's membership benefits available for download in the Chapter Resources section of the ALA website (login required) — [Elevating the Legal Management Profession brochure](#).

Appended to this toolkit are several documents to assist you with developing your recruiting materials:

- Chapter Information Worksheet [Appendix B]
- What Makes Your Chapter Great? Template [Appendix C]
- Communication Plan Form & Types of Communication Worksheet [Appendix D]
- Sample Scripts, Letters, Emails and Postcards [Appendix E]

C. Capitalizing on Existing Relationships

Historically, chapters have found that the most effective membership recruitment efforts are tied to existing relationships. These connections typically fall into two categories: relationships with chapter members and relationships with business partners.

To capitalize on these connections, many chapters offer incentives to their membership to bring in new membership candidates. These are typically offered in the form of gift cards, raffles or points for referrals that count toward earning conference scholarships. Incentives can be quite effective in enticing current members to talk about the chapter with their friends and colleagues.

1. Business Partner Referral Program

Your business partners offer another way to reach out to potential members. By virtue of their current relationships within the local legal community, these individuals are well-connected and, in many cases, trusted advisers. Some chapters will simply ask for assistance from their business partners, while others will offer incentives such as gift cards or referral points. You can also try hosting unique social events where both business partners and current members are encouraged to bring potential members. Some chapters have also invited business partners to participate on their chapter membership committees. If permitted under chapter bylaws, this is another way to get business partners actively involved with the growth of your chapter. [[Sample: BP Referral Program Letter for PLAA](#)]

2. Membership Building Campaign

One way to build personal relationships for a successful membership campaign is to ask members to identify law firms that are not currently represented in the chapter. These can be law firms they have heard about, law firms where their friends work or law firms in their building. Perhaps you have an attorney or group of attorneys who have come from or gone to another local law firm; this would be a great way to find out what law firms are in your chapter's footprint. Your current members can then reach out to these prospects with an invitation to breakfast or lunch. The goal is to create an opportunity to build a relationship and talk about ALA.

D. Adding a Personal Touch to Cold Calls to Prospective Members

Membership campaigns can be effective if you can determine a way to include personal touch points. While a personal telephone call will always trump a mass mailing or bulk emails, if you use mass communication tools, make your message stand out. Chapters have had increased success when they include something interesting in a letter, such as a piece of chocolate, or when they attach a short video or link to an email. Adding a little extra to your outreach will increase the likelihood that your message will be heard or read.

E. Student Member Recruiting

Do not overlook future leaders in the business of law. Students in business and prelaw programs are potential future legal professionals. Involvement with an on-campus organization or internship program that connects students to business partners and local law firms is a great way to expose the next generation to ALA. [Here are examples from some chapters that have student membership available: [Minnesota Student Member Brochure](#), [Pittsburgh Job Site Flyer](#), and [Pittsburgh Careers at Law Firms Flyer](#).] Student membership was created specifically for this group.

II. Onboarding and Orientation

The following ideas could be incorporated into your chapter's onboarding process and orientation program. The best delivery format will be determined by the chapter's resources and leadership, but it is important to ensure that each new member receives an orientation and is onboarded successfully. Appended to this document is a member orientation checklist template [Appendix F] and a sample member onboarding program [Appendix G].

A. Welcome Communications

1. Telephone Calls

A welcome telephone call from your membership chair or chapter leadership is one way to connect with new members. Unlike other forms of communication, this type of dialogue is bidirectional, enabling the caller to develop an understanding of what the new member hopes to gain from chapter membership. This understanding can help the caller steer the new member to the resources of most interest to them and help chapter leaders build awareness of what their members want.

2. Welcome Letters

Written welcome letters from chapter leadership are also common. Letters typically introduce the new member to the chapter and often include a calendar of events or important chapter information. Some chapters send an announcement to their membership at large to welcome new members to their ranks. Other chapters have their newsletter editor reach out to all new members and interview them for the new member section of the newsletter or website. Both methods increase the likelihood that all members of the chapter learn a little bit about your new members. [Here are some existing samples from ALA chapters: [Dallas Welcome Letter and Kit](#), [Las Vegas Letter](#) and [Wisconsin Email](#).]

3. Welcome Emails

Welcome emails are another common practice. Some chapters send a welcome email that mimics the welcome letter described above; however, other chapters have implemented ongoing email campaigns to increase the connection. The Minnesota Chapter, for example, sends a series of weekly emails to new members for the first six weeks of their membership introducing them to various features of the chapter. Other chapters send emails to new members for the first six weeks, and then follow those emails with a three-month, six-month, nine-month and one-year anniversary email. When using this type of ongoing communication, it is important to understand what information your new members want and what information is too much, as well as what is feasible for your chapter's bandwidth.

4. Videos

Welcome videos have become more popular among chapters. Videos are created by chapter leadership that detail membership benefits and important ALA and chapter events. These videos can be posted on the chapter's website and added to social media accounts. When new members join, a link to the video is emailed to them.

5. Welcome Gifts

Some chapters provide new members with a welcome gift, and one chapter even reports delivering a "welcome wagon" package to new members full of goodies and logo swag, plus information about the chapter and ALA.

B. Welcome Events

1. Breakfast with the Board

Welcome events such as breakfast (or lunch) with the board are common among chapters. Whether conducted on an annual, quarterly or monthly basis, most chapters have some type of welcome event for their newest recruits. The idea is for the new members to meet board members, committee chairs (depending on the size of the chapter) and other new members. This is an ideal time to give new members chapter brochures or calendars of upcoming events and for board members to answer any questions that new members may have. It is also an opportunity to learn what new members hope to gain from their involvement in the chapter. Many new members report that these smaller welcome events are less intimidating than showing up at a large chapter function where they may not know anyone.

2. New Member Welcome Lunches

Some chapters host smaller welcome lunches for new members. Instead of inviting the entire board and committee members, the Houston Chapter keeps it more intimate by inviting no more than two new members along with two engaged members serving in leadership or committee roles. During the lunch, the engaged members can get to know the new members and discuss chapter events and benefits. These small lunches are more successful because they are less intimidating than a large quarterly or annual orientation meeting, and new members seem to talk more, ask more questions and, thus, get involved more quickly.

3. Get-to-Know-You Lunches

A few chapters report having “get-to-know-you” lunches. These lunches focus more on learning about the new member and less about presenting the chapter and ALA. Some of these focused lunches mix newer members with longtime members who have been disengaged or inactive for a while. Chapters that have tried these types of lunches report that by mixing the two groups together, there is increased dialogue and engagement compared to a forced mentorship program.

4. Invitations and Incentives to Events

Some chapters find inviting new members to established events is also a great way of getting to know them. Waiving the registration fee to local chapter socials or statewide events is an effective way to incentivize new members to participate. Other chapters give new-member-only scholarships to statewide or annual conferences.

5. Recognition at Chapter Events

Identifying new members at chapter events encourages other members to connect with them. Some chapters, such as the New Orleans and Pittsburgh Chapters, print “New Member” ribbons and place them on the name badges of all new members at membership meetings and events. Other chapters report using different color name badges for new members so that everyone knows who is new to the chapter and makes them feel welcome.

C. Connecting New Members with Existing Members

Chapters have myriad ways of connecting new members with existing members. These programs range from informal meetings to quite formal programs. Appendix H to this document includes sample programs from a number of chapters that seek to foster connection between new and existing members in a way that works for each chapter.

1. Ambassador Programs

Many chapters have informal ambassador programs where chapter volunteers “adopt” new members. The ambassadors reach out to the new members inviting them to coffee or lunch. After initial contact is made, these individuals keep their new members informed of chapter meetings or events and sit with them at the chapter’s events. The ambassadors follow up with the new members on a regular basis to answer questions about the chapter or ALA in general. Most of these programs last for approximately one year.

2. Mentorship Program

Other chapters have formal mentorship programs wherein chapter leadership assigns a veteran member mentor to the new member. The mentor is chosen based on geographic location and similar positions, if possible. These chapters encourage the mentor to reach out to the new member within the first few weeks of joining the chapter and invite them to breakfast or lunch as an introduction. On an ongoing basis, mentors invite their mentee to meetings and events that are sponsored by the chapter and introduce the mentee to other chapter members. Mentors commit to

being active with their mentee for the first 12 to 18 months of their membership. The mentor is asked to touch base with the mentee at least every other month (or more frequently, if the mentee is not attending monthly meetings or social events). Some chapters also set aside money for mentors to treat mentees to lunch, while others provide mentors with \$10 Starbucks gift cards so the mentor can treat the mentee to coffee. [Examples: [Gateway Chapter Mentor Guide](#) and [Orange County Mentor Program](#).]

Team mentorship programs consist of assigning new members to a team of two to three seasoned mentors to help introduce them to the chapter and accompany them to events to help make introductions. The theory behind the team approach is that by giving the mentee more than one mentor, someone will be able to provide coverage at all events and a more robust picture of ALA will be offered from several perspectives.

3. Peer-to-Peer Programs

Peer-to-peer programs are also popular among chapters. The peer-to-peer programs are less about engaging a new member in ALA and more about providing professional guidance. Many of the chapters that have started these programs pair members based on job functions or area(s) of expertise. In some chapters, this pairing is not limited to a new member and a veteran member — both peers may be veterans, or both may be new members. The concept behind these programs is to share common experiences, bounce ideas off each other and provide guidance to each other while building a friendship through the chapter. One chapter even allocates chapter funds to the pair, giving each duo \$100 per year to use for meetings over lunch or drinks. The pairings are generally a yearlong assignment with the possibility to renew each year.

4. Connection Teams

Connection teams are another way to get new members involved at the chapter level. Many chapters have created teams designed to encourage newer members to take an active role in the chapter. The Capital Chapter has created a Next Generation Leaders Community that was designed for Millennial legal managers and new legal managers with a focus on mentoring, education and networking. Members of this community have reported to chapter leadership that they can learn and grow without feeling behind the curve of the more senior members.

Programs to connect new members with chapter leadership and other members are useful tools to ensure that new members quickly build ties with the organization. As an added plus, acting in the role of ambassador, mentor or peer is a great way to engage long-term members in new and interesting ways.

III. Assimilation and Engagement

Assimilating and engaging members is key to the long-term success of a chapter. It is important to take a variety of factors into consideration while looking at how new members are assimilated into the chapter and the levels of engagement within your new and existing members.

Disengagement of members can happen quickly. Do not discount any member's ability to contribute or be active in some way. Availability and bandwidth changes over time, and this year's disengaged member may be next year's superstar volunteer. Be open to different ways for

individual members to participate in meaningful and convenient ways. Chapter leadership will want to be as inclusive as possible to all members. Providing a platform for discussion, open-ended possibility and creativity will allow members to discover how they can impact the organization or be impacted by the chapter. Bring your members along with you, ask them to follow along as they are able or consider asking them to step up or take a leap to invest in their own leadership, education and personal and professional development.

A. Consider Location

Location may be a challenge for some of your members. They may not work or live near your chapter's events. Consider varying the locations of activities to connect with members in outlying areas. Be sure to include distant members in communications regardless of location so they are aware of activities that might be of interest to them. Your chapter leadership might also consider adding a virtual option for members to attend or recording educational offerings so members can view at a time and location that is more convenient for them. Creating variety in date, time and location may also benefit local members whose schedules or workloads make it hard for them to attend meetings in person.

B. Social Media

The use of social media provides your members with the opportunity to engage in two-way communication that can be viewed by others. Consider using platforms that allow your members to openly communicate with leadership and fellow members. You can use social media as an outlet to share upcoming events for your chapter and ALA, welcome and recognize new members or membership anniversaries and broadcast other important announcements. See Appendix I to this toolkit for resources on content and ALA social media information.

C. Member Recognition

Recognizing members on various levels will allow chapter leadership to engage members on a personal level. There are several ways to create opportunities to recognize members, including a member of the month or week that recognizes unique efforts or talents. Your chapter may also establish or celebrate annual awards and recognition: Some ideas include: New Member of the Year, President's Award of Excellence, Community Service Awards, etc. You might also consider rewarding attendance at events with the opportunity to win discounted renewals or registrations. Cross-referral programs are another way to recognize members that bring in new business partners and vice versa.

D. Tracking Engagement

Using a document or online platform to track attendance is vital to understanding the level of engagement for your membership. Knowing how often, when and where your members are attending events could help chapter leadership identify where certain members are being engaged, what types of events are the most popular, and what days, times and locations are most convenient to members. Appendix J is a sample tracking table with some analysis of data.

This tracking tool will also help your chapter identify individualized options to reach out and connect with members. Perhaps there is a member who only attends social outings, but not educational events. This might be an opportunity to inquire if the member would like to help plan social events for the chapter. Or maybe a member only attends the annual education each year; this provides an opportunity to see if that member might like to help with the selection of speakers at the event. Or the chapter could ask why the member only attends that one event to see if there are other program offerings the member might like to see. Be creative in asking questions and documenting the answers so the chapter leadership can recognize trends for successful engagement.

E. Identifying Engaged Members and Potential Leaders

When a member joins your chapter, it is good practice to poll the member as to what avenues the member is interested in by way of the membership application. That is the chapter's first opportunity to identify where the member might like to participate. Take advantage of that opportunity as soon as the chapter receives the information. Educate the member on the inner workings of the chapter, invite the member to participate with board members or committee members. Then let the member tell the chapter leadership where they would like to be engaged or volunteer. Be sure your chapter has the resources to encourage leadership by way of mentoring or peer-to-peer coaching so that the chapter does not lose out on this potential leader.

Retaining chapter members is a tough job, and not every member has the same intentions for membership. But there are several ways to identify which members are good candidates for additional outreach and connection and those who might make good potential leaders. In addition to capturing data on engagement via attendance tracking, surveying your members provides a direct line of communication to determine what members need, who is interested in serving as a leader and what the chapter may want to improve or change. Chapter leadership should listen to what inspires a member to be active and should attempt to address concerns, suggestions and comments when engaging with its membership.

Much like recognizing strengths in your employees, be sure to recognize strengths among your chapter members. Seek or ask where members can or would like to contribute. Do you notice that there is a new member or long-term member who might be eligible for board or committee leadership? If so, discuss among your board how leaders can be developed.

F. Volunteer Opportunities

Managing a successful ALA chapter is a lot of work, and most of the individuals doing that work are volunteer leaders within the chapter. These volunteers manage finances, deadlines, expectations, networking, education programs, membership outreach campaigns and more. The tracking or surveys the chapter uses to gauge member involvement and interest will help your leadership identify where members may want to volunteer their time. Reach out to the members who are engaged or have expressed an interest in serving with micro-volunteer opportunities to gauge how effective they might be in a larger volunteer role. Keep in mind the tasks don't need to be momentous, but simple, easy, even onetime opportunities: printing and delivering nametags to an event, securing a speaker for one meeting, greeting new members outside a meeting location, hosting one meeting at their office location, selecting and securing a meeting location

for one meeting, contributing an article or blog post for the chapter's newsletter or social media, or providing a topic and leading discussion for a roundtable event. After the member commits to the volunteerism and completes the task, be sure to recognize the member for their efforts.

From these micro-volunteer opportunities and expressed interest, chapter leadership can begin to identify and develop a pipeline of volunteers for the larger projects and positions within the chapter leadership. A member's interest and ability to volunteer is likely to change over time, yet the most robust surveys tend to occur when a member joins. This might not be the best time for them to volunteer for a leadership role. Your chapter should consider adding a regular (perhaps annual, at the time of membership renewals) survey to members to identify their interest in both micro- and larger volunteer opportunities.

IV. Departing Members

A. Exit Interview Outreach

This outreach can range from a formal telephone call or email to the more informal conversation with members you know well. Some chapters report asking departing members to complete an exit interview form, like this example from the [Pittsburgh Legal Administrators Association \(PLAA\)](#).

Appended to this document is a Departing Member Interview worksheet designed to provide you with a framework for conducting an exit interview conversation with members who are not renewing their chapter membership. [Appendix K]

B. Successors and Succession Planning for ALA Members

When it comes to successors, ideally, the departing member will discuss ALA international and chapter membership with their replacement before departing, particularly if the individual is unfamiliar with the organizations. There may be an opportunity for both individuals to attend a chapter event together before the transition is final. The ultimate responsibility is still that of chapter leadership to engage the successor as soon as possible.

In instances where succession occurs internally (as opposed to an outside candidate), it is even more imperative to retain the membership, as it is evident that the individual already has the support of their organization to participate in ALA at both levels. With ALA annual dues payable at year end, chapters with alternate renewal cycles may be able to identify individuals choosing not to continue based on receipt of the Association's quarterly membership reports.

ANALYSIS OF REASON(S) FOR DEPARTURE

I. Personal and Professional Reasons

With the average age of ALA members creeping closer to Social Security's full-benefit retirement age, retirement serves as a primary reason for the departure of ALA members.

Involuntary transitions, largely through elimination of legal administration positions, are another leading contributor to the loss of ALA members. In an effort to reduce overhead, legal

organizations of all types downsize and consolidate legal administration roles. Not only do members lose their jobs, oftentimes they are unable to find new positions in a timely fashion, as fewer opportunities are available and competition for those that are available rises.

Though less frequent than involuntary transitions, voluntary transitions to alternate fields of employment do occur. Examples include physical relocation of members to locales where legal administration positions may no longer be as readily available; members who are unable to advance in their careers and thus search for more lucrative (both in status and compensation) opportunities elsewhere; and members who lose interest in the legal administration sector. Additionally, there are members who choose to leave their careers for personal reasons.

Competition for resources is another reason a member departs. Today, there is a seemingly endless list of professional associations relevant to the legal management profession. Organizations that ALA members may perceive as offering better services, pricing and/or social opportunities may lure them away. Those without the financial means and/or time to participate in multiple associations may have a difficult decision to make. This may be especially true for members who specialize in one area and/or are more engaged with their specialty association(s) like HR, IT and finance.

Relocation is another cause of chapter departure. Your chapter leadership can encourage continuation of ALA membership and encourage the individual to find a new chapter, or discuss the opportunity to be an independent member. Additionally, a member of ALA might move into your geographic area and want to join the chapter, especially if they received value out of their previous chapter experience.

II. Return on Investment

Your members may have also expressed concerns over variety, quality and/or availability of educational content offerings. Do you know what educational content your members are seeking, and is your chapter taking the appropriate steps to provide the same?

Many members are largely unaware of the variety of product and service offerings available to them through their ALA membership and chapter membership. Simply sharing this information with members upon their initial enrollments in the organizations is not enough. Chapters must continue to develop and implement new ways to increase awareness of the value of membership over the course of a member's legal administration career (and beyond). Chapter leadership should be familiar with ALA resources and communicate them to members on an ongoing basis.

The cost of dues at both levels may be a prohibitive factor to sustained membership renewal. Chapters can offset these concerns by making sure they offer value through education, leadership development, networking opportunities, active business partner programs and creative pricing structures.

Additionally, there are members who, at times, feel they are not included or welcomed when attending events. Some members believe there are too many cliques within the organization, either at the local or the international level or both. Other members find it difficult to interact with volunteer leadership, make their voices heard or have their opinions considered.

At the chapter level, are you actively combatting this perception by connecting members and making them feel welcome? Consider using the annual survey or other feedback mechanisms to identify these issues so they can be addressed before a member has decided to let their membership lapse.

CONCLUSION

Membership growth and retention is vital to the existence and continuation of any healthy organization. With ALA's unique structure, this growth and retention must occur at both the international and local levels. Managing a membership program is a difficult task, especially when you have volunteered your time to serve in a leadership position outside your day-to-day job. The ALA Membership Development Committee created this ROAD map and toolkit to empower and support chapter leaders to develop or enhance their chapter's membership recruiting, onboarding, assimilation and engagement and departure experiences.

This toolkit was developed to provide chapter leaders working on membership with both broad scope guidance and detail-specific ideas and things to consider. The members of ALA's Membership Development Committee hope that somewhere in this document your chapter finds something of value. Thank you for your role in helping our Association remain vibrant and useful to its members.

APPENDICES

- Appendix A: Target Audience Worksheet
- Appendix B: Chapter Information Worksheet
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- Appendix E: Sample Scripts, Letters, Emails and Postcards
- Appendix F: Member Orientation Checklist Template
- Appendix G: Member Onboarding Program Sample
- Appendix H: Member Connection Program Samples
 - AALA Peer2Peer Connection Program
 - Albany Chapter Mentor Policy
 - Gateway Chapter Mentor Guidelines
 - Orange County Chapter Mentor Program
- Appendix I: Social Media Resources
 - Social Media Guidelines for ALA Members, Chapters and Leadership
 - First Five Chapter Social Media Checklist
 - Sample *Just the Facts* social media document
- Appendix J: Attendance & Engagement Tracking Sample
- Appendix K: Departing Member Interview Worksheet

APPENDIX A

TARGET AUDIENCE WORKSHEET

I. Target Audience Examples

- A. Independent/lapsed members of ALA and/or your local chapter (they know about ALA but aren't participating in your chapter — why aren't they in your chapter?)
- B. Legal management professionals who may not know about ALA
- C. Legal management professionals who may not know they are eligible for ALA membership (next-level leaders, specialists within firms that have participating ALA members)
- D. Attorneys involved in managing law firms who might not know they are eligible for ALA membership
- E. Individuals at law firms where members work who may succeed current members

II. Identifying Target Member Audiences

- A. What are the local legal associations that may have potential members that participate? (Local/state bar associations, other organizations you and your chapter members' attorneys are members of)

- B. What legal support positions have local associations? (Legal Marketing Association, local paralegal organizations, NALS, International Legal Technology Association, Legal Professionals Association, etc.)

- C. How is legal news and information shared in your area? What are the sources of legal news, education and alerts?

- D. What schools in your area have paralegal and/or legal support educational programs?

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-
-
- E. Can you get a list of law firms in your geographic area to compare against your membership roster? Ask ALA headquarters for assistance or reach out to your local bar association(s) for member firm information. Use local Chamber of Commerce listings/directories; review local publications for advertisements and legal news/announcements.

-
-
-
- F. Work with your business partners to identify other firms they could introduce to you to discuss ALA.

-
-
-
- G. Use LinkedIn as a research tool to find local law firm administrators.
-
-
-

CHAPTER INFORMATION WORKSHEET

This worksheet is intended to provide key information that the individual who oversees membership for the chapter may need to know when recruiting and retaining members.

A. How many chapter members do you currently have?

B. What is the breakdown of the number of members by type of organization?

Law Firm

Government Organization

Nonprofit

Bar Association

Corporate Legal Department

Student

Retired Member

Consultant

College/University

Other

C. What is your breakdown of members by functional area within law firms?

Principal Administrator

Administrator at a Local Office

Human Resources

Facilities

Technology

Marketing/Business Development

Financial/Pricing

Process Improvement/Project Management

Other

D. Do you have a business partner program? What is the breakdown for the different options for sponsoring your chapter?

E. Do you have a mentorship program?

- F. What types of leadership opportunities does your chapter provide?
- G. Are there any scholarships available?
- H. What social and networking opportunities are there?
- I. What are the options for sections/small groups to connect around a functional area, expertise or firm size?
- J. What opportunities are there for community service?
- K. What opportunities are there for professional development/education assistance?
(e.g. CLM study group)
- L. What other opportunities does your chapter provide?

WHAT MAKES YOUR CHAPTER GREAT?

This section explains how to talk about the benefits of your chapter. What is your chapter's elevator pitch? Prepare a script that can be used in various communications regarding your chapter's benefits.

Select 10 of the items below to place on your chapter letterhead/brochure/email to easily create a marketing document to share with potential members.

1. Our chapter provides access to educational meetings (monthly/bimonthly/quarterly/other) covering topics in the core areas of ____.
2. Our chapter provides access to network with ____ (insert number of chapter members) legal professionals to share ideas and help educate one another on the business of law.
3. Our chapter dues are only \$____ annually (this is in addition to the annual dues for the Association of Legal Administrators, which is a requirement to join the chapter).
4. Our chapter provides members with access to an extensive network of local business partners so that members can gain access to resources to be successful in their positions.
5. Our chapter has a Certified Legal Manager (CLM)[®] Study Group (insert description of timing of study groups, duration and if you compensate for the exam fee).
6. Our chapter has a Diversity and Inclusion Program (insert short description).
7. Our chapter has a job bank providing your organization with FREE (or insert price) job postings.
8. Our chapter conducts a local compensation and benefits survey to help members analyze market compensation and assist member firms with budgeting for salaries in various positions in the legal industry.
9. Our chapter has a Student Internship Program (insert short description).
10. Our chapter has a New Member Mentorship Program (insert short description).

11. Our chapter has an Emerging Leadership Program (insert short description).
12. Our chapter has a relationship with the State of ____ (insert your state) (or other local bar association) which provides members with ____ (insert short description of benefits).
13. Our chapter has a Scholarship Program for attendance at international educational events hosted by the Association of Legal Administrators.
14. Our chapter's Community Connection Partner is ____ (insert charity/community organization), which provides members and business partners the opportunity to network and serve the community.
15. Our chapter hosts ____ social/networking events each year, including a business partner exposition event (or insert other activities hosted by your chapter).
16. Any other unique or interesting programs or benefits your chapter offers.

Please contact our Membership Director:

Name [Insert contact info]

Phone [Insert]

Email [Insert]

COMMUNICATION PLAN FORM

I. Tips

- A. These plans may not be exhaustive.
- B. There is no one right way to do this. Customize for what works for your chapter.
- C. This is part of your recruiting communication. Once they join move to the onboarding communication plan.
- D. Using the Types of Communication Worksheet (next page), review the appropriate timing of the various communication types based on the target audience(s) your chapter has identified.

Target

Audience: _____

Type of Communication	Timing

Target

Audience: _____

Type of Communication	Timing

Target

Audience: _____

Type of Communication	Timing

TYPES OF COMMUNICATION WORKSHEET

- A. Communication scripts for the different types of communications.
- B. There is no right way to do this. Customize for what works for your chapter.
- C. Jot down notes on what types of communication your chapter wants to use and what information should be included in each. Use the samples in Appendix E to help you brainstorm.

Communication Type: _____

II. Details/Outline:

Communication Type: _____

III. Details/Outline:

SAMPLE TELEPHONE SCRIPTS

I. Telephone Call Scripts — ALA member but not chapter member

IF YOUR TELEPHONE CALL IS ANSWERED ...

Chapter Representative: Good morning/afternoon, my name is [state your name]. I am the current [state role within your chapter or, if no specific role, say “I am a current member”] of the [chapter name] of the Association of Legal Administrators. How are you today?

Wait for response, and briefly acknowledge same, if necessary/appropriate.

Chapter Representative: I know you are a member of ALA but notice that you have not joined our local chapter. Were you aware of that?

Wait for response; continue to #1 below if “yes” or #2 below if “no.”

#1 – **Chapter Representative:** Is there any reason for why you have not joined our chapter?

Wait for response, then continue to #2 below, but only after you have addressed the reason(s) given, e.g., cost of dues and/or individual events, distance from event location(s), date(s) and time(s) of events.

#2 – **Chapter Representative:** The [chapter name] is a wonderful complement to your international ALA membership. By joining us, you have the opportunity to both network with local colleagues and receive more focused education in a more intimate setting on a more regular basis. I cannot imagine what my career would be like without my [chapter name] affiliation. Would you be interested in attending our upcoming [state name, date and time of event] as my guest?

Wait for response; continue to #1 below if “yes” or #2 below if “no.”

#1 – **Chapter Representative:** Wonderful! May I please verify your email address to send you a confirming email and more information about the event?

Wait for response; continue to #3 below if “yes” or #5 below if “no.”

#2 – **Chapter Representative:** I am sorry you will not be available to join us. May I please have your email address so I can send you information about future events?

Wait for response; continue to #3 below if “yes” or #6 below if “no.”

#3 – **Chapter Representative:** May I follow up with you next week to make sure you received my email?

Wait for response; continue to #4 below if “yes” or #5 below if “no.”

#4 – **Chapter Representative:** Excellent, will do. Thank you so very much for your time and should any questions arise in the interim, please do not hesitate to contact me.

#5 – **Chapter Representative:** Understood. Thank you so very much for your time. I look forward to seeing you at the [state name of event]. Should any questions arise in the interim, please do not hesitate to contact me.

#6 – **Chapter Representative:** Understood. Thank you so very much for your time. Please do not hesitate to contact me should any questions arise in the future.

IF YOUR TELEPHONE CALL IS NOT ANSWERED...

Chapter Representative: Good morning/afternoon, [state the first name of the person you are calling]. My name is [state your name], and I am the current [state role within your chapter or, if no specific role, say “I am a current member”] of the [chapter name] of the Association of Legal Administrators.

I know you are a member of the ALA but notice that you have not joined our local chapter.

The [chapter name] is a wonderful complement to your international ALA membership. By joining us, you have the opportunity to both network with local colleagues and receive more focused education in a more intimate setting on a more regular basis. I cannot imagine what my career would be like without my [chapter name] affiliation.

I am calling to invite you to be my guest at the upcoming [state name, date and time of event]. Kindly return my telephone call at [state your telephone number] at your earliest convenience to let me know if you will be able to join my fellow [chapter name] members and me for this sure-to-be-fabulous event.

If you have the person’s email address, add the following sentence. If not, continue to the final sentence below.

I will send a follow-up email containing my complete contact information and more details about the event later today.

I look forward to hearing from you.

II. Telephone Call Scripts – Not an ALA member or chapter member

Chapter Representative: Hello, my name is [state your name, title and firm/company]. How are you today?

Pause – wait for response.

Chapter Representative: Glad to hear that (*or* I can relate, I've had days like that also). I wanted to find out how long have you been in your position with [law firm]?

Pause – wait for response.

Chapter Representative: Wow that's impressive (if long tenure) *or* I know what it's like to be fairly new to your role with your company (under five years). Do you find it difficult to stay up to date on legal industry happenings for your position with the firm?

Pause – wait for response.

Chapter Representative: I would love to introduce you to members of the [chapter name] of the Association of Legal Administrators because there are resources available to you (*or* you could be a really valuable resource to others in your position).

The organization focuses on the competencies of legal professionals in the core areas of financial management, human resources, communications management, the legal industry and business management, and operations management, which also includes technology. Our Association provides [monthly/quarterly/annual] educational meetings focused in these areas, as well as networking and community service opportunities.

Would you be interested in being my guest at an upcoming event?

Pause – wait for response.

If yes, offer to email an invitation. **Chapter Representative:** Could I send you an email containing information about the next event? [collect email address or confirm email address]

If no, offer to send more information. **Chapter Representative:** Could I send you more information about our organization? [collect email address or confirm email address]

Either response. **Chapter Representative:** Would it be OK if I follow up with you in about a week to make sure you received my email?

SAMPLE LETTERS/EMAILS

I. ALA member but not a chapter member

Sample 1

I received an email from the Association of Legal Administrators (ALA) announcing that you recently joined ALA. Congratulations! I hope you find it as rewarding as I have.

I would like to invite you to become a member of the local ALA chapter, [chapter name]. [Chapter] offers many benefits to its members, such as educational programs, professional resources, an annual salary and benefits survey and great networking opportunities. Monthly meetings with informative presentations, focused seminars, and an exciting, educational annual conference combined with a great business partner exhibition are held for the Association annually. We also support a variety of committees and special interest groups, many of them specific to your firm's practice.

For more information on [chapter], please visit our website at [website]. Many of the areas on the website are accessible by the public and contain helpful information. There is also a section regarding membership, where you can obtain more information.

I hope that you and your firm will find the benefits offered by [chapter] to be invaluable. In addition to the website link, I have added links below with the online application, the benefits of joining, and our monthly newsletter.

[links to key information]

If you have any questions, please feel free to contact me. I have included my information below. I would be more than happy to talk to you regarding [chapter], it has been such a great support to me. I hope to hear from you soon.

Sample 2

I am writing to congratulate you on becoming a member of the Association of Legal Administrators (ALA). I hope that you will enjoy the many benefits of your international membership, so valuable to our positions and firms. Belonging to the local chapter will add enormous value by furthering your educational and networking opportunities on a local level, while giving you easy access to the many local business partners who support the ALA. Attached is some general information about the benefits of [chapter name] membership.

To find out more about the [chapter name] or to join, please visit the chapter's website at [website]. There, you will learn about our member benefits, such as our quarterly events, workshops/roundtables, webinars, educational conferences and our members-only message boards. Becoming involved with your local chapter will allow you to make connections with peers, share knowledge and stay informed on the latest trends in the legal profession.

We are offering [chapter name] membership at the reduced rate of just \$49 for the remainder of 2020 — just follow this link and use the discount code JOIN49 during checkout. If you decide to

Appendix E – Sample Scripts, Letters, Emails and Postcards

join the [chapter name], please let me know if you are available to attend our [event] on [date]. I'll send you a discount code for the registration. This event will no doubt be a great opportunity to see what the [chapter name] is all about and meet and mingle with fellow chapter members and business partners. I've attached a copy of the event brochure for your review.

Please feel free to reach out to me if you have any questions. I look forward to hearing from you.

Sample 3

We are glad to hear that you are a member of the international Association of Legal Administrators (ALA).

Would you be interested in joining our local [chapter name]? I have been a member for more than [length of your membership] years and have found it to be a wonderful forum to share ideas and learn from other administrators within the legal community. ALA offers many high-quality programs, seminars and conferences that are very educational and enhance my leadership development. I have gained so much knowledge from participating as a member, so naturally I was excited about the opportunity to become more involved and contribute to our local [chapter name].

Please see below (and attached) regarding some of the benefits and feel free to reach out to me or [alternate contact person, if there is one] if you have any questions or require additional information.

In today's economic climate, managing a law firm and/or working within the legal field requires special expertise. Among other things, a professional administrator must deal with ever-changing employment laws, fast-paced technological changes, management trends that contradict age-old practices, and fundamental changes in the way the practice of law is structured and conducted. For immediate solutions to challenges you face daily, you need the **Association of Legal Administrators**.

The attached outlines the many benefits of being a member of ALA international as well as the local chapter. Some of those benefits include:

- Monthly educational speakers at our luncheons
- Quarterly newsletter — *[name of newsletter]*
- Monthly webinar education
- Networking with other administrators both nationally and locally
- Opportunities to win scholarships to educational conferences
- Professional assistance in locating resources and references to management questions

If you are interested in becoming a member of the local chapter, we would like to invite you as our guest to our next monthly meeting on [insert event details]. Our monthly meetings are normally [insert meeting schedule].

Please let me know if you are interested in attending our upcoming meeting on [date]. You may also check us out online at [website].

If you have any questions regarding the [chapter name], please do not hesitate to contact me.

II. Not an ALA member

Sample 1

I am writing to you in my role as the membership chair of the [chapter name] of the Association of Legal Administrators (ALA) to encourage you to join ALA. Our mission at the [chapter name] is to increase the skills, abilities and professionalism of the membership through the development of programs that focus on the practice of legal management. We provide support and guidance to the membership through networking opportunities and by providing a forum for the exchange of information and ideas. The benefits of membership to you and your firm will undoubtedly exceed the cost. Members have access to advice, resources, expert guidance and connections for all aspects of legal management.

To give you the opportunity to evaluate the benefits of membership, we are inviting you to come to our next meeting for FREE as our guest. The next meeting will be on [date and time]. This month's topic is [insert topic and other pertinent details]. Please contact me if you'd like to attend and I'll provide you with information about the location. Additionally, if you choose to join ALA, [insert details of any dues offers].

The benefits of membership in ALA are outlined in the enclosed brochure for your review. In addition to the benefits of membership in the local chapter, ALA members receive numerous benefits from the international Association of Legal Administrators. International membership includes the opportunity for professional certification, national conferences, webcasts, e-newsletters, magazines, salary and benefit surveys, and specialty publications.

Our chapter's monthly luncheon meetings are held at [insert details]. Please feel free to call me at [phone number] or send me an email at [email address] with any questions regarding the enclosed information or to reserve a place at our next meeting.

Sample 2

I hope this email finds you well.

As [insert chapter position], I wanted to personally reach out to you and thank you for being a member of ALA international. I also wanted to follow up with you regarding becoming a member of the [chapter name]. I know we have reached out to you in the past, but it has been a while and you may be looking to make some connections in the [city/state] legal community. For your reference, I am attaching the chapter membership application and the payment information. The rates are currently reduced to [dues] for the chapter!

We have had many great events and benefits that already took place this year, including:

- [List out events and educational opportunities.]

I am also attaching a pamphlet regarding making the most of [chapter name] membership. Take a look! There are many great membership benefits you may not even be aware of. If you are still on the fence about becoming a member, we would love to invite you to our next educational luncheon on [date] at [location], which will cover [subject/topic]. The meetings are generally one hour with excellent guest speakers, and I am certain you will find it to be an hour well spent.

Lastly, if there is a specific reason as to why you are not interested in [chapter name] membership, it would be immensely helpful for us to know why that is. I will be personally reaching out to you with a phone call within a couple of weeks, and I would sincerely appreciate a moment of your time to discuss your potential membership.

Thank you, and I look forward to hearing from you.

Sample 3

Hi! My name is [chapter president's name] and I am a law firm manager just like you. [X] years ago, I was new to the area and relatively new to law firm management. My managing partner, [managing partner's name], recommended I join the Association of Legal Administrators (ALA). This proved to be some of the best advice I ever received.

ALA has given me numerous opportunities to advance my career, stay current on industry trends, stay ahead of our competition and network with my peers. Answers to management questions are a click or a phone call away. My managing partner often asks me to “go online” or “send an email” to my ALA network to obtain responses to current issues facing our firm. It is gratifying to know that so much knowledge and experience is within my reach not only at the local level, but regionally and internationally as well.

I am now President of the [chapter name], which supports law firm managers in [location]. I have obtained [list some of your personal ALA achievements, e.g. CLM designation, articles written, presentations made, etc.]. Who would have thought that the “new kid on the block” [X] years ago could have come this far?

I would like to offer you the same incredible opportunities that were afforded me by inviting you to be my guest at our annual Member Night on [date], at [location]. During this casual get-together, we will explain the benefits of ALA membership and familiarize you with some of the amazing resources, such as *BOLD Bites*, a weekly online newsletter that keeps you current on trends in our industry. You will also have the opportunity to meet others in the legal field and share ideas, concerns and concepts.

Attached for your review are a chapter brochure, Member Night registration and a calendar of events. I hope you will accept my invitation and join us to learn more about how we can help make your life easier.

If you can't make Member Night, please complete the attached Interest Survey to let us know if you want to stay on our mailing list. If you have any questions, give me a call at [phone number] or send an email to [email address].

POSTCARD EXAMPLES



YOU'RE INVITED!

BE OUR GUEST!
We would love for you to join us at the following events to learn more about
**The Dallas Chapter
Association of Legal Administrators**

**BUSINESS PARTNER
APPRECIATION LUNCHEON**
January 18, 2018 | Tower Club
11:30 AM – 1:00 PM
Speakers Oliver Yandle & Alan Wilson of ALA

HUMAN RESOURCES SECTION MEETING
(everyone is invited)
January 23, 2018 | Belo Mansion
12:00 PM – 1:00 PM
*Speaker Greg McAllister of Littler Mendelson P.C. –
Harassment – Supervisor's guide to understanding,
preventing, and correcting harassment and retaliation*



ACTIVE ALA MEMBER: Donna Rankin, Munsch Hardt Kopf & Harr, P.C.

OPPORTUNITY AWAITS!

Managing Partners, Administrators, and
Legal Professionals are welcome to attend.
Please join us at one or both events!

RSVP@DALLASALA.ORG

WHO WE ARE
Our membership is comprised of law firms of
all sizes throughout Dallas and Collin counties.
Our goal is to enhance your personal and
professional growth by providing educational
and networking opportunities.

Membership in ALA will:

- Expand your law firm management
knowledge through education programs;
- Expand your connections and visibility
within the Dallas legal community; and
- Provide resources to help you solve your
legal management challenges.

For more information, visit **WWW.DALLASALA.ORG**


750 N. St. Paul Street, Ste 1800
Dallas, Texas 75201

ADDRESSEE
ADDRESSEE
Company Name
Address
City, ST 55555





YOU'RE INVITED!

BE OUR GUEST!
 We would love for you to join us at the following events to learn more about
**The Dallas Chapter
 Association of Legal Administrators**

HUMAN RESOURCES SECTION MEETING
(everyone is invited):
 October 24, 2017 | Belo Mansion
 12:00 PM – 1:00 PM
Speaker Andrew Malahowski of A.J. Gallagher & Associates

CHAPTER GENERAL MEETING
 November 9, 2017 | Tower Club
 11:30 AM – 1:00 PM
Speaker Judy Hissong of Nesso Strategies

RSVP@DALLASALA.ORG

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750 N. St. Paul Street, Ste 1800
 Dallas, Texas 75201

ADDRESSEE
ADDRESSEE
 Company Name
 Address
 City, ST 55555



YOU'RE INVITED!

BE OUR GUEST!
 We would love for you to join us at the following events to learn more about

**The Dallas Chapter
 Association of Legal Administrators**

**LARGE FIRM ADMINISTRATORS
 SECTION MEETING**
 March 13, 2018 | Belo Mansion
 12:00 PM - 1:00 PM
Roundtable discussion regarding general administration of firms with more than 75 attorneys and/or the management of one or more offices.

HUMAN RESOURCES SECTION MEETING
 March 27, 2018 | Belo Mansion
 12:00 PM - 1:00 PM
*Speaker: John P. Hagan of Hagan Law Group LLC
 Topic: Independent Contractor Misclassification*



ACTIVE ALA MEMBER: Bob Gordon, Firm Administrator of Burford & Ryburn, L.L.P.

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750 N. St. Paul Street, Ste 1800
 Dallas, Texas 75201

**ADDRESSEE
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 Company Name
 Address
 City, ST 55555



ALAMN
A Chapter of the Association of Legal Administrators

You know how vital it is that your lawyers belong to the Bar Association to maintain their educational competency.

Why wouldn't you want the same for your legal management team?

Provide your legal managers with access to profession-specific, cutting-edge intelligence and powerful resources today by investing in memberships for the local Minnesota chapter (ALAMN) and international Association of Legal Administrators (ALA).

ALAMN MEMBERSHIP BENEFITS:

- Secure access to benchmark research, exclusive data, and essential tools
- Build knowledge and skills; learn management strategies and best practices
- Explore the latest innovations, technologies and developments in legal practice management

**So what are you waiting for?
JOIN TODAY!**

Membership in the Association of Legal Administrators (ALA) and Minnesota chapter (ALAMN)* provides access to:

- Annual Education Conferences
- Research Studies
- Legal Management Resource Center
- ALA Reference Desk and Webinars
- Monthly Newsletters and Meetings
- Peer Consulting Database
- Members' Only Forums

www.ala-mn.org | www.alanet.org

ALAMN
A Chapter of the Association of Legal Administrators

c/o IntrinXec Management, Inc.
5353 Wayzata Blvd. • Suite 350
Minneapolis, MN 55416
www.ala-mn.org

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MEMBER ORIENTATION CHECKLIST TEMPLATE

This checklist can be used to ensure that all new members of your chapter get a similar welcome and introduction. A good orientation experience will help new members become engaged with your chapter. Customize this document for your chapter's needs.

- ☐ Confirmation received from ALA that member has joined international Association
- ☐ Send invite to join chapter
- ☐ Additional invite to join chapter (if needed)
- ☐ Chapter application received with dues payment
- ☐ Verify ALA membership if chapter application is received prior to confirmation from ALA
- ☐ Email ALA membership department to request member be affiliated with chapter
- ☐ Notify Chapter Board
- ☐ Add new member to chapter website directory/database/listserv
- ☐ Assign mentor/peer and contact that mentor/peer
- ☐ Send welcome email/letter from the chapter with link to website, website login information and instructions on how to update their online bio
- ☐ Send welcome gift from the chapter
- ☐ Send welcome email to membership at large
- ☐ Send invitation to first member meeting/social/business partner event
- ☐ Add member to the New Member Welcome Lunch invite list
- ☐ Send Onboarding Email 2 (example — discuss education [meetings and webinars])
- ☐ Send Onboarding Email 3 (example — discuss networking [socials and social media])
- ☐ Send Onboarding Email 4 (example — discuss business partners [participants and programs])
- ☐ Send Onboarding Email 5 (example — discuss conferences [international and statewide])
- ☐ Send Onboarding Email 6 (example — discuss the Cs — charities, committees, CLM)
- ☐ Send New Member Survey at end of first year

MEMBER ONBOARDING PROGRAM SAMPLE

This document can be used to conduct a group or individual orientation session for your chapter. Your chapter could simply fill in the areas listed below and provide the document to a new member or use this document as an outline to update your members on an annual basis when the board turns over. Whatever method you choose to use this document in, the MDC hopes that your chapter will find it to be a useful tool for introducing members to your chapter.

Chapter Mission:

[If your chapter has a mission or value statement, now is the time to discuss that with the new member. This will help lay the groundwork of the organization so that expectations from both the chapter and the member are met.]

Sample Mission:

Improve the quality of management in legal services organizations. Promote and enhance the competence and professionalism of legal administrators and all members of the management team. Represent professional legal management and managers to the legal community and to the community at large.

Chapter Leaders:

[List all of your chapter leaders here and a brief description of their role with the chapter. Your chapter may use different titles or not have a board member in each role listed below.]

- President
- Vice President/President-Elect
- President-Elect-Elect
- VP of Education
- VP of Membership
- VP of Communications
- VP of Special Projects
- Treasurer
- Secretary
- VP of Business Partner Relations
- Past President

Member and Business Partner Directories:

[In this section, you would want to either provide a list of members and business partners and provide a link to your chapter website where those directories exist. Or maybe during your live orientation show your new members where to locate the directories on your chapter website.]

Chapter Communication Tools:

[In this section you will want to explain to your new members how to get in touch with chapter leaders and other members and view general communications. List where your chapter newsletter can be found on your website, share your chapter's social media handles, explain how to use listservs and forums that your chapter has available.]

Attending Events:

[In this section you will want to point out to the new member how to register for events. Should the new member expect an email invitation or check the event calendar on your chapter website? Do attendees email a specific contact to RSVP for events? Also, provide instructions on how the members pay to attend events (credit card, check, cash as the door, etc.). Discuss what behavior is expected from members at events: casual environment, professional environment, respectful, judgment-free, etc.]

Mentorship Program (Ambassador Program):

[If your chapter has a mentorship or ambassador program use this opportunity to explain how it works. Does the member need to apply for a mentor, will a mentor automatically be assigned, how long does the mentorship last, and what are the expectations of the mentorship?]

Sample Mentor Program Description:

The [chapter name] of the Association of Legal Administrators employs a Mentoring Program as a tool to provide developmental opportunities for both mentors and mentees. The program is designed to promote professional and personal development among legal management professionals by connecting them with others who can advise, coach and guide them. The goal is to match “seasoned” members/mentors with “new” members/mentees to get them acclimated to our organization, including awareness of the many benefits of membership, and to enhance their experience.

The benefits of mentoring go well beyond the occasional protocol question. Many mentees believe that the single greatest benefit of a mentor/mentee relationship is having a confidant and advisor. Others feel that the insights they received from their mentors truly helped in their professional development, and yet others believe they benefited from the encouragement and morale boost provided by their mentor.

Questions regarding this program should be directed to [contact name] at [phone number] or [email address].

Member Expectations:

[What does your chapter require from the member? Do your bylaws have specifications on how many meetings can or cannot be missed, eligibility for committee/team participation and volunteer opportunities? This is an opportunity to discuss options for participation in your chapter and what the member can expect to achieve from various levels of participation.]

Chapter Expectations:

[Ask your new member what they expect from the chapter. What does the new member hope to gain from membership? There is no wrong answer here. This will help the chapter determine the level of participation that could be expected from this member. It could provide insight as to where the member could be utilized to maximize skills and volunteerism. The member may be involved just for the education. If that is the case, be sure to highlight those options for the member.]

Chapter Committees:

[Provide a description of each committee within your chapter so your new member has an understanding of activities that are happening within the organization. This section may or may not overlap with the chapter leader positions.]

Terms and Acronyms to understand (examples):

- **ALA:** Association of Legal Administrators (international association)
- **WALA:** Wisconsin Association of Legal Administrators (Chapter Name)
- **CLM:** Certified Legal Manager (CLM)[®], an accreditation achieved by ALA members by an exam and maintained on a regular basis by securing ongoing educational credits.
- **Community Connection Partner:** A nonprofit organization selected by the chapter that will be supported on a specific timeframe or maybe ongoing basis. Funds may be collected and volunteerism may be encouraged.
- **Business Partner:** A vendor that pays a sponsorship fee to the chapter. Funds are used for education, event planning and scholarships. In exchange for the sponsorship, business partners are awarded opportunities to connect with members based upon the SOG.
- **SOG:** Sponsorship Opportunity Guide is an outline of sponsorship opportunities for business partners (what the vendor receives for its sponsorship funds to the chapter).
- **ACE:** Annual Conference of Education, where a full- or half-day of learning that includes CLM credits is provided by the chapter.
- **BPAP:** Business Partner Advisory Panel is a group of members and business partners who discuss opportunities between the two groups to better plan for networking and relationship building.
- **Business Partner of the Month:** Business partners are featured each month on the chapter website and recognized at monthly meetings for their sponsorship to the chapter.
- **Monthly Meeting:** Monthly meetings consist of a short networking period followed by an educational speaker.
- **Joint Meeting:** A joint meeting is one that is hosted by a chapter and one or more other chapters participate in person or virtually. This happens when there is a valued speaker or topic that both areas desire to learn from.
- **Social:** Socials are events that provide a networking platform for both members and business partners. They may take place, for example, in the spring and fall seasons.

- **Expo:** An expo is held annually in accordance with the SOG. Sometimes the expo is held in conjunction with ACE or the Big Hearts Campaign. This is an opportunity for business partners to showcase offerings to members in a non-threatening environment.
- **Job Bank:** The job bank can be found on the chapter website. Your firm can send job postings to the manager of this area or you may find yourself seeking opportunities here.

MEMBER CONNECTION PROGRAM SAMPLES

- [AAALA Peer2Peer Connection Program](#)
- [Albany Chapter Mentor Policy](#)
- [Gateway Chapter Mentor Guidelines](#)
- [Orange County Chapter Mentor Program](#)

SOCIAL MEDIA RESOURCES

- [Social Media Guidelines for ALA Members, Chapters and Leadership](#)
- [First Five Chapter Social Media Checklist](#)
- [Sample *Just the Facts* social media document](#)

ATTENDANCE & ENGAGEMENT TRACKING SAMPLE

	year																			
	Jan	Feb	March	1Q Social	Retreat	April	May	Annual	June	Charity 1	2Q Social	July	Aug	Sept	3Q Social	Oct	Nov	4Q Social	Dec	Charity 2
Member A					x			x												
Member B	x		x		x			x		x										
Member C	x	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x	x
Member D				x	x			x			x				x			x		
Member E							x		x			x	x	x		x	x		x	
Member F																				
Member G			x						x			x								

Some ways to analyze engagement based on attendance:

- Member A attended conferences/retreats. Their chapter engagement is low, and the chapter should reach out to find ways to connect with this member.
- Member B is moderately engaged. This member attended the retreat and annual conference and a few monthly chapter meetings. Keep an eye on this member.
- Member C is all-in on their ALA and chapter membership. This member may be a great candidate for volunteer or leadership roles.
- Member D seems to be most interested in the social aspects of membership. Can the chapter find ways to connect more deeply with this member? Perhaps they would be a good ambassador or would like to lead icebreakers or other social components of monthly meetings.
- Member E joined the chapter in April and is committed to the monthly meetings. This member isn't attending the social events. Perhaps this member isn't comfortable at these meetings and would like to be assigned an ambassador. Leadership should reach out to this member to make sure they are enjoying their experience and see if there is anything the chapter can do to improve the experience.
- Member F hasn't been to anything all year. Is this member active on virtual platforms? Do they get together with other members outside of official events? This member may be at risk of letting their membership lapse.
- Member G's engagement is sporadic. Dig deeper. Were the three sessions this member attended on the same topic? In the same part of town? On a particular day of the week/month? At a unique time? If all of these meetings had something in common, you now know more about this member's interests or availability. Tap into that and see if the member wants to be more involved in those types of meetings.

DEPARTING MEMBER INTERVIEW WORKSHEET

This worksheet is intended to provide departing members the framework of a conversation about their decision to leave the chapter. The feedback received by departing members is an opportunity for the chapter to improve issues that may be impacting member retention.

On your leaving [chapter name], we want to provide an opportunity for you to comment on your reasons for not renewing and to recommend any changes to the organization you feel would be helpful to others. Please review this form as preparation for our discussion.

- (i) Why have you chosen to not renew your chapter membership?

- (ii) Are you also letting your international ALA membership lapse?

- (iii) Were your initial objectives for joining the chapter met? Please elaborate on how they were met and/or how they may have changed.

- (iv) Are there any specific changes that would have changed your decision to leave? Did you raise them to the Board or other chapter leaders?

- (v) If the chapter made changes/improvements, would you consider rejoining?

- (vi) Before making the decision to let your membership lapse, did you consult with any other chapter members?

- (vii) What areas of the chapter provided you with the most value?

- (viii) What areas of the chapter did not provide value?

- (ix) Would you recommend the chapter to someone interested in joining?

- (x) Any additional comments are welcome.
