



**ASSOCIATION OF LEGAL ADMINISTRATORS**  
**Committee Plan of Work 2019**  
Submitted: October 2018

**ALA MISSION:**

ALA is the undisputed leader for the business of law, focused on the delivery of cutting-edge management and leadership products and services to the global legal community.

We identify and provide solutions to the most strategic and operational challenges our members and customers face today, while we prepare them for the opportunities and challenges of tomorrow.

**ALA's STRATEGIC GOALS 2017-2020:**

1. Define our Identity
2. Increase Member and Business Partner Value
3. Enhance Industry Thought Leadership
4. Advance Legal Management Professional Development
5. Build Community and Engagement

**COMMITTEE NAME:** Certification Committee

**COMMITTEE CHAIR:** DeAnna Ouderkirk, CLM, MBA, SCP

**COMMITTEE VICE-CHAIR:** Ken Koehn, CLM, CPA, CMA

**ALA BOARD LIAISON:** Debbie Elsbury, CLM

**ALA STAFF LIAISON:** Patricia Carrera, JD, CKM, CPLP

**TESTING CONTRACTOR:** Dr. Gavan O'Shea, HumRRO transitioning to Tiffany Day in 2019

**COMMITTEE SIZE:** 10 (for 2019 transition only then reverts back to 9 with 3 rolling off in 2020)

**COMMITTEE TERM:** 4 years, non-renewable

**CALL FOR VOLUNTEERS:** Fall

**SELECTIONS MADE:** Winter

**COMMITTEE PURPOSE:**

Along with the ALA Board of Directors and staff, the Certification Committee ensures that the CLM program constitutes a fair and rigorous assessment process as a means of improving the professional development and stature of legal management professionals.

The Committee serves to review, revise, and manage the Certified Legal Manager (CLM) certification program. Its primary responsibilities include writing new test items, reviewing and revising test items, working with the testing contractor to evaluate and improve the assessment process, working with the professional staff in overseeing the administration of the program, and recommending needed changes in prerequisite and recertification requirements, subject to the approval of the Board of Directors.

**ROLE:**

- In collaboration with ALA's Board of Directors and staff, the Certification Committee oversees the quality and integrity of the Certified Legal Manager (CLM) certification program.
- Promotes awareness of the CLM credentialing program and communicates its benefits to all stakeholders.
- Recommends reference materials targeted at increasing an examinee's mastery of each of the competency areas.
- Develops and maintains the certification assessment following certification industry standards and best practices.

**COMMITTEE MEMBER ELIGIBILITY AND SELECTION PROCESS:**

Committee members must be a Certified Legal Manager and must have completed at least one recertification cycle. Although expertise in one or more functional areas is not critical for every member, it is important to maintain a balance of knowledge among committee members. Interested individuals complete an application form, which includes references, areas of expertise, and a writing sample. Committee members are interviewed and carefully considered based on educational background, experience level, size of firm, areas of expertise, and writing skill.

**COMMITTEE CONFIDENTIALITY:**

Committee members will frequently have access to confidential information and materials related to the CLM testing program. As the integrity of the program is of utmost importance, confidentiality must be maintained by each committee member.

Each member is responsible for maintaining test materials in a secure fashion and treating sensitive information confidentially. This refers specifically, but not exclusively to the questions, themselves. No member may make or keep copies of test questions, or discuss test items with anyone outside of the Committee, including ALA Board members.

Furthermore, members of the committee are not permitted to know the identification of any candidate for the exam. Only the names of successful CLM candidates will be revealed to the committee. Information about precise pass scores is not released to the Certification Committee. Pass rate information, although shared with the committee, is not advertised outside the committee because the relatively small numbers of examinees means that these rates fluctuate across test administrations.

Because of their unique knowledge of the contents of the CLM examination, committee members sign a confidentiality agreement every year and are not permitted to be involved in study activities and development of study products (e.g., commercial study guides). This moratorium continues for at least 3 years after a member rotates off the committee.

## **COMMITTEE MEMBER EXPECTATIONS / MEETINGS:**

Participation on the Certification Committee requires members to fully and actively participate in all aspects of committee work. Committee members are required to train in item writing and test development, devote their own time between meetings researching and writing test questions, attend in-person meetings, virtual meetings and conference calls, and serve as spokespeople for the CLM program. Identifying source materials is as much a part of the process as the creation of new test questions.

Attendance is required at one in-person committee meeting per year (Annual Conference). The in-person meeting is a full-day meeting at the Annual Conference to welcome and orient new committee members, bid farewell to outgoing committee members, conduct the score-setting process, conduct item-writer training, receive writing assignments, and review conference CLM-related activities. Committee members also attend a CLM breakfast or lunch and represent the committee for short periods at a booth in the conference exhibit hall to answer questions about the certification program.

Participation in 5 to 7 virtual meetings is required by all committee members. The first 2 half-day virtual meetings will be held on consecutive days in mid-summer (early July) to review the first half of the items assigned at the Annual Conference. The ALA staff liaison will set up the Zoom Meeting but not participate in the call. The HumRRO representative will moderate the meeting to review and update the item. The next virtual meeting will also be 2 half-day sessions and will be held on consecutive days in late September or early October to review the remaining and corrected items assigned at the Annual Conference. The fall virtual meeting will be 4 to 6 hours in length and will be held in late Oct or early Nov, at this meeting the Committee will conduct administrative business for the benefit of the CLM program. Finally, Committee members must also be available for a half-day to full-day virtual meeting held in the winter/spring. Committee members evaluate the program and test blueprint at this meeting, and conduct other administrative business for the benefit of the CLM program.

Also, there is an orientation conference call in the winter/spring for new members joining the committee, which is attended by the Certification Committee chair and vice-chair, the ALA staff representative, a HumRRO staff member, and mentors to the new committee members. The orientation call reviews the committee handbook and provides new members with preliminary background about the certification program, the role of the committee, ALA, and HumRRO, and expectations prior to the first committee meeting, as well as give the new members an opportunity to answer questions about the committee and handbook.

On an ongoing basis, the Committee also reviews the program and responds to issues with respect to accreditation, and committee members promote and serve as spokespeople for the program.

## STRATEGIES TO ACHIEVE ALA GOALS:

1. Define our Identity. Even if a member has not earned a CLM, the competencies that form the basis for the CLM program (as determined from the Knowledge, Skills, and Abilities (KSA) Study) describe the responsibilities of a legal management professional, and members who have earned a CLM certification demonstrate a high level of achievement in these competencies. ALA, CLM, and KSAs go hand-in-hand to define the identity of ALA for the legal management profession.

The Committee encourages ALA to increase the visibility of the CLM designation to members, as well as the highest levels of management and attorneys in the legal field by linking the following:

- Connect the competencies of a Certified Legal Manager revealed in a detailed KSA study/practice analysis sponsored by ALA, with
  - ALA's leadership role developing the CLM program based on those competencies, with
  - the value of a legal management professional who possesses the knowledge, skills, and abilities of a Certified Legal Manager, and
  - ALA's role in developing education and training of individuals for the wide-range of responsibilities and competencies of legal management professionals, in general and in seeking a CLM certification.
- a) **Promote ALA's identity in conjunction with CLM certification and the competencies (KSAs), which forms the basis of the CLM program**, and encourage employers to promote that the firm is run by a legal management professional (or a *certified* legal management professional). In other words, it is this certification that demonstrates the legal management professional is a standout in the field, and ALA is the organization that provides this certification. ALA is also the leader in providing education to develop the knowledge to be a CLM.
  - b) **Press release the name of CLMs** along with their firm name, city, State, and ALA Chapter, along with information about the background and prestige of the CLM program.
  - c) **Encourage Chapters to do more recognition of CLMs** as representatives of the mastery of the competencies of a legal management professional, especially at any managing partner events.  
**Develop a template for Chapters to use for their publicity activities.**
  - d) Encourage Chapters to **educate their local and State Bar Associations**, as well as **the American Bar Association** about CLM in publications and social media, especially Law Practice Management sections of attorney organizations.
  - e) Provide the CLM Committee's **list of ideas to Chapters** to increase the visibility of the CLM program (for example, in the Chapter Leaders online community).

- f) Use the **enhanced letter about the certification standard to send to the CLM’s managing partner and Chapter President when their legal management professional passed the exam** to describe the CLM program, the qualities of a CLM, the prestige of the accomplishment, the breadth of knowledge required to sit for the exam, pass the exam, and remain certified, to show why the firm and chapter should be very proud of the individual’s accomplishment, and to show ALA as an elite organization that sponsors the CLM program.
- g) **Initiate letter/email campaign to managing partners (once or twice a year)** to notify them about upcoming CLM exam and encourage them to support the CLM certification and “journey” toward certification (e.g. prerequisite education, test fees, recertification education) for the legal management professionals in their firm. Need to find a way to develop an email contact list.
- h) Include information in **the Career Center section** of the ALA website about the benefits of earning CLM for both employers and employees. ALA’s CLM certification enables employers to efficiently identify qualified applicants and encourages and improves employee job performance.
- i) In the Career Center section of the ALA website, **use the job application, itself, as a marketing opportunity** by incorporating a description of the CLM designation, that it means an employee has taken coursework and passed an exam demonstrating a mastery of the KSAs, etc.
- j) **Develop an inspirational tagline** (to replace “Got CLM”) to generate interest and excitement in achieving CLM certification. Feedback from ALA marketing is that an inspirational tagline does a better job of generating excitement than a task-oriented hashtag. However, the hashtag #justtakethetest has caught on among members and is fun to communicate on an individual basis.
- k) Include a presence for CLM information at the **regional and specialty conferences**.
- l) Encourage CLMs to include a link to the **ALA CLM page in their signature line and in their website profiles** to find out more information about CLM.
- m) **Collaborate with recruiters and other business partners** who are on the front lines to promote CLM, both the value of hiring a CLM and the value of ALA in providing the education and leadership to develop the competencies of a CLM.
2. Increase Member and Business Partner Value. ALA’s Certification program increases membership value by:
- demonstrating a member’s mastery of knowledge in all areas of legal management,
  - increasing professional credibility and value to their firm (a seat at the table),
  - demonstrating the ability to meet rigorous standards of quality,
  - increasing a member’s marketability and ability to compete in the job market, differentiating the CLM from others,
  - personal satisfaction from earning a great achievement,
  - enhancing the member’s skill set & broadening the member’s knowledge base, and

- recertification ensures that members stay current in the legal management profession.
- a) **Encourage members to seek certification**, no matter what stage of career, no matter what size firm, no matter how many times it takes. **The certification allows members to stand out among their peers.** Members only have to pass the exam once and then recertify.
  - b) **Publish profiles of CLM members** describing their journey to become a CLM, how their firm supports and advertises their designation, and the benefits they have received from their firm/vendors/others since receiving their designation.
  - c) **Encourage CLMs to share their subject-matter expertise in the ALA Online Communities.**
  - d) **Survey CLMs** to ask for ideas about how to CLM has provided value.
  - e) **Offer discounts and incentives to business partners** who pass along savings and incentives to members who are CLMs.
  - f) **Offer discounts** on membership dues, conference registration, etc. to CLMs.
  - g) Enhance the information in the **ALA membership profile** to include the date of taking exam(s), the date achieved CLM, recertification date and payment information, and a place to record continuing education coursework for recertification.
  - h) Add a certification module to Headquarters' internal software system that will provide **enhanced tracking and reporting for the CLM program**. For instance, we would like to see how many CLMs used the eLearning course to study for the exam.
  - i) Provide **digital CLM certificate** that can be shared in professional profiles and that contains information about the credential with a link back to the Association.
  - j) Provide **more self-study options** for the application and recertification.
  - k) Train Chapter representatives to be an **ALA-approved provider** so Chapters are able to determine CLM application and recertification credit on their own.
  - l) In the fall 2018 to 2019, the Committee will expand the concepts included within the competencies in **preparation for an updated practice analysis in 2020**. The practice analysis forms the basis of the CLM program and is updated from time to time to ensure that the competencies are still relevant. Work with HumRRO on aligning the UPBMS codes with the KSAs and work toward identifying areas that may need to be addressed in the item writing for 2019 and 2020.
3. Enhance Industry Thought Leadership. ALA's CLM program is an exceptional program that enhances ALA as thought leaders in the legal industry by following the guidelines and best practices in the professional credentialing field and by selecting committee members, staff, and testing contractor who follow disciplined and rigorous processes based on credentialing standards.
    - a) The Committee will **work at the highest levels of proficiency** when developing test items to ensure a high quality, reliable, reputable, and sought-after certification program. CLM is a designation that all legal management professionals will strive to achieve.

- b) Committee members will collectively have a **mix of qualifications, credentials, and wide-ranging experience** representative of the legal management industry, which increases the value of the work of the Committee and prestige of CLM program.
  - c) Committee members will **increase its role as spokespeople** to increase the visibility of the CLM designation as a prestigious accomplishment and a legal management industry standard, which will advance the growth of the program and reinforce ALA's identity as thought leaders.
4. Advance Legal Management Professional Development. ALA develops valuable education and career development tools to assist individuals in becoming Certified Legal Managers which demonstrates a high level of competence in the wide range of knowledge, skills, and abilities essential in the legal management profession.
- a) **A CLM study guide was published in 2018!** (*Hooray!*) Four subject-matter authors drafted the study guide. The format of the study guide follows the published body of knowledge tested on the CLM exam. The Certification Committee reviewed the content at a high level to make sure the study guide and practice questions do not include content not tested or exclude important content that is tested. The study guide sales have been increasing and we are looking forward to seeing how this helps those sitting for the November exam. An Errata sheet is being distributed to correct some mistake made in the study guide. As updates are needed, the Certification Committee will continue to provide the necessary reviews.
  - b) Develop **eLearning courses** to help study for the exam, along with the ability to complete an exam to earn a specialist certificate, which can be a step in the direction of seeking certification.
  - c) Prepare a **Strategic Plan** to build a clear credentialing path to certification and badges that are reflective of the entire path. Work with the Membership Development Committee on their Pillars
  - d) Increase visibility of **ALA seminar and webinar information** that *teaches competencies tested on the exam* and seminar and webinar information that *qualifies for the application*. (Ex. In CLM Exam Study Tools shared interest group, BOLD Bites, Legal Management, Website, social media.) (Sometimes it is not clear to prospective CLMs that there are two different types of courses: one type of course is a pre-requisite teaching concepts that are not on the exam and another type of course teaches concepts in the body of knowledge that are on the exam.)
  - e) **Enhance the Certification Committee presentation** for CLI and/or Annual Conference to include comments by recent CLMs who can describe their professional background and experience studying for the exam, in addition to the “under the hood,” studying, and visibility portions of the program.
5. Build Community and Engagement. Studying for the CLM exam and passing the exam builds a sense of community among ALA members who worked hard to achieve their certification.
- a) Offer opportunities for CLMs to gather similar to the CLM breakfast/lunch and CLM lounge at conference.
  - b) Promote group studying as a method to prepare for the exam.

- c) Promote all current CLMs (and their firms) to the legal industry in publications, social media, and through Chapters.

**COMMITTEE RESPONSIBILITIES:**

1. The Committee will research and develop test items that assess knowledge of the competencies identified by a 2012 practice analysis for principal legal administrators through careful research, writing, review, and refinement of each item.
2. Committee members will participate in professional item writing training, conducted by the program's testing contractor, to ensure high quality, valid, and reliable multiple choice test questions.
3. Committee members will engage in a process for setting the cut score for each exam using a modified Angoff strategy, a standard approach in the certification testing industry.
4. The Committee will continuously review and maintain a multiple-choice test that reflects the important competencies identified by the practice analysis and ensure the test items remain relevant.
5. The Committee will develop an updated list of reference materials that will be used by Committee members to support test items written for the CLM exam, which will also be published as potential resources for individuals preparing for the CLM exam.
6. The Committee will review criteria for education programs based on current industry best practices.
7. Committee members will promote and serve as spokespeople for the CLM program, subject to confidentiality restrictions.
8. The Committee will periodically evaluate the program to improve the assessment process and determine whether changes should be made to ensure the program's value and cost efficiency, and recommend needed changes in prerequisite and recertification requirements, subject to approval of the Board of Directors.
9. The Committee will, at all times, maintain security and confidentiality of test items, cut scores, pass rates, and any other testing content.
10. Committee members will participate in the enhancement of the visibility of the CLM certification, such as recommendations for increasing publicity and marketing, and increasing the value of the designation for certified individuals and their employers, subject to approval of the Board of Directors.



**RESOURCES:**

ALA staff engagement, meeting space, and travel for staff and committee members will be required to support the work of this committee. A virtual meeting platform is required for several meetings. ALA staff administrates and markets the program. The most significant direct expense is for the testing contractor, HumRRO. HumRRO provides expert consulting regarding the design, development and implementation of the exam in accordance with industry best practices. In addition, there are direct expenses for each test and each candidate when exams are administered (twice a year). It is critical for the continued growth and energy surrounding the CLM program to finalize the IMIS program or a similar electronic platform and making it available for more self-management of the CLM certification and recertification would be very beneficial to everyone. With several individuals sitting for the Fall exam we need to formalize who will be handling each part of the support for the program so it runs smoothly for the new CLMs and those up for recertification.

ALA is well-positioned in its visibility of the CLM program internally to ALA members. The study guide will also continue to be a great boost to increase visibility of the program internally as well. The CLM program is now poised and ready to increase its reach beyond ALA members and, therefore, would greatly benefit in marketing to increase the visibility of the program outside of ALA to lawyers, Bar Associations, firms, and managing partners.

**PROPOSED DATE:** January 2019

**EFFECTIVE DATE:** \_\_\_\_\_