



HOW TO DETERMINE WHAT EDUCATION QUALIFIES FOR CLMSM CREDIT

These instructions seek to answer the question: What constitutes CLM credit for a program?

To start, we need to first look at the Education Requirements required of *all CLM Exam Applicants*, as laid out on pages 4-5 of the [CLM Information and Application Packet](#)).

ALL CLM APPLICANTS – GENERAL EDUCATION REQUIREMENTS

To apply to sit for the exam, ALL CLM APPLICANTS must meet certain experience and educational requirements.

In terms of education, ALL CLM applicants must provide, within the 24 months preceding the date of their application, a minimum of 2 hours of course work in each of the following five (5) Management Categories:

Note: *You may use 2 different subjects within the Category to obtain the 2 hours you need, such as 1 hour of stress management and 1 hour of project management to complete Self-Management Skills, but all sessions must be a minimum of 60 minutes.*

1. **WRITING SKILLS** (e.g., writing memos, policy manuals, proposals, job descriptions)
2. **COMMUNICATION SKILLS** (e.g., oral presentations to staff and lawyers, interpersonal relations, interactions with clients and vendors, performance counseling, client contacts)
3. **SELF-MANAGEMENT SKILLS** (e.g., stress management, time management, project management)
4. **INFORMATION TECHNOLOGY** (e.g., features and capabilities of computer and network hardware and software systems, including general purpose packages like spreadsheets, database programs and word processing applications, as well as specialized software systems supporting practice management, including financial analysis and management; training in the use of computer systems like word processing and accessing informational databases)
5. **ORGANIZATIONAL DEVELOPMENT** (e.g., leadership styles and techniques, team development and management principles, organizational development techniques such as change management, negotiation and conflict management techniques)

When CLM credit for the *general educational requirements for the application* is provided at our conferences, you will see the CLM logo or other CLM designation, and a statement will follow providing the category.

If there is no CLM logo or other CLM designation at one of ALA's conferences, the session does **not** fulfill a CLM applicant's *general educational requirements*, i.e. does not fulfill one of the five Management Categories. However, Functional Specialists (see job descriptions on pg 9 of the [CLM Information/Application Packet](#)) will likely be able to use nearly all the education at the conference towards the *additional* educational requirements they need for the application.

HOW TO DETERMINE WHAT FULFILLS THE GENERAL EDUCATION REQUIREMENTS IN THE 5 MANAGEMENT CATEGORIES

The following are examples of coursework that fulfill the Educational Coursework Management Categories that must be completed by ALL CLM applicants. Each example is followed by one that does NOT fulfill that category.

WRITING SKILLS

The following example fulfills 1.5 hours of CLM credit in the Writing Skills Management Category

Session Title: Write Better Right Now

Time: 9 – 10:30 A.M.

Description: Learn how to write effective internal communication, including e-mail. This back-to-basics class covers classic grammar “gotchas,” such as when to use which or that and who or whom. The presenter will also share a trick you can use to increase the power of your writing style, and identify strategies good writers use to capture the attention of their readers.

Analysis: Any instruction that seeks to improve one's written skills qualifies in this category. This session covers grammar, usage, and writing style, basics skills that are essential to good writing. It therefore qualifies for CLM Credit in this Management Category.

Writing skills may also include education that provides vital information needed for creating technical documents such as Employee Handbooks, RFPS, job descriptions, etc.

The following example does NOT fulfill CLM credit in the Writing Skills Management Category.

Session Title: Career Development: Résumé Writing and Interview Skills

Time: 9 – 10 A.M.

Description: You may plan an active role in the hiring and managing of law firm staff, but how prepared are you to find a job and successfully market yourself in today's changing economy? This hands-on workshop will help you move beyond the basics of résumé writing and job hunting. Discussion topics include the current hiring environment, weathering a career transition, career management tips, developing a career plan, résumé writing and interview tips, marketing yourself, networking, and job search challenges.

Analysis: To determine CLM credit, one needs to look at the *main focus* of a session and decide if

its focus is clear and true, and can be used in your work. Based on both the title and the description of this session, the main focus of this session is conducting a successful job hunt –no job-related writing instruction and also not something that can be used in your work. Thus this session does not qualify for CLM credit in the Management Category of Writing Skills.

COMMUNICATION SKILLS

The following example fulfills 1 hour of CLM credit in the Communication Skills Management Category.

Session Title: Persuasive Communication: How to Win Anyone Over to Your Point of View
Time: 9 – 10 A.M.

Description: Every time you try to persuade - whether it's one person or a large group - you may assume your success is based on what you say and how you say it. Learn how to map out your argument so that you stay on track and present a concise, compelling case, monitor your communication style to ensure you set a prepare-listen-speak rhythm, and detect verbal and nonverbal cues that shape how you pitch your ideas.

Analysis: This session is all about improving communication styles, both verbal and nonverbal. It easily fits into the Communication Skills Management Category, which includes both oral communication skills and interpersonal relation skills.

Communication Skills covers verbal or nonverbal communication skills, such as clear and concise oral presentations, interpersonal and interaction skills, performance counseling skills, body language skills, listening skills, etc.

The following example does NOT fulfill CLM credit in the Communication Skills Management Category.

Session Title: The Mentoring Cycle-Offering an Edge in Competitive Labor
Time: 9 – 10 A.M.

Description: Learn the pitfalls of incompatible mentoring partnerships and the many ways you can use mentoring to engage employees, enforce your firm's strategic planning, create a valuable career professional development opportunity for your attorneys, strengthen your diverse culture and increase morale.

Analysis: While mentoring involves communication skills, this session is not about learning the necessary communication skills to mentor. Its *main focus* is on the value of mentoring to a firm's morale and culture. It therefore does not qualify for CLM credit in the Management Category of Communication Skills.

SELF-MANAGEMENT SKILLS

The following example fulfills 1 hour of CLM credit in the Self-Management Skills Management Category.

Session Title: Break the Cycle of Stress: Skills for Health and Peak Performance
Time 10 – 11 A.M.

Description: Give yourself the skills you need to perform effectively under high pressure. By breaking the cycle of stress, you can enhance communications and productivity at your firm and dramatically benefit your personal life. The principles and techniques you learn in this session are essential for successful leadership, self-mastery, focus and ability to work effectively with others.

Analysis: To meet the criteria of the Self-Management category, sessions must clearly lay out how to master a particular skill and the skill being taught must clearly and tangibly benefit the organization, as this session does. It's about acquiring and/or improving in a skill that benefits one's self *and* one's job.

Self-Management Skills may also include project management, time management, priority management, memory skills, problem-solving, producing plans & schedules, self-motivation skills, resilience-building, boundary-setting, etc.

The following example does NOT fulfill CLM Credit in the Self-Management Skills Management Category.

Session Title: Choices – You Are What You Choose

Time: 9 - 10 AM.

Description: The choices you make create your results. In this motivational session, participants learn the secret which 99 percent of the population does not know. They are asked to examine the types of choices they routinely make – and rethink how to get optimal results through a change in personal choices.

Analysis: Quite often, when a session is motivational in nature, the focus is solely related to personal growth. This is unfortunately one of those areas that can be hard to define, and even harder to measure in terms of what skill is being taught or its value outside of personal well-being. Therefore, to qualify in the Self-Management category, a session must satisfy two key questions: what skill is being taught *and* is it directly and tangibly job-related? If there seems to be ambiguity on whether it does or does not meet the skill & job criteria – it likely does not.

INFORMATION TECHNOLOGY

The following example fulfills 1.25 hours of CLM credit in the Information Technology Management Category.

Session Title: Electronic Client Service: Extranets

Time: 10 – 11:15 A.M.

Description: In this session, the speaker will discuss how an extranet can provide better service by giving clients access to their files. But, like any new technology, there are ethical and security questions that must be addressed. This open service works best for clients that appreciate the ability to access their own documents rather than those who prefer to have their documents digitally delivered by the firm.

Analysis: This session covers the “how to” features of an extranet. Moreover, ethical and security aspects are also covered which in this case, are important features, for an administrator can not roll out an extranet without the appropriate security in place.

Other IT sessions may provide a skill set in a particular software (ex: Microsoft Access, Excel, PowerPoint, various types of Financial Software, etc.) and thus also fulfill the “features and capabilities of computer and network hardware and software systems,” one of the areas defined as fulfilling the Information Technology Management Category.

The following example does NOT fulfill CLM credit in the Information Technology Management Category.

Session Title: Electronic Marketing

Time: 10:30–11:30 A.M.

There are many ways to market your firm electronically. In this session, the presenter will discuss real-world electronic marketing ideas, such as blogging, podcasts, Webinars, YouTube, social networking, e-mail marketing, Web sites, electronic newsletters, and more. Each of these marketing channels involves some staffing issues to monitor and maintain the system. In addition, some marketing such as associate blogs, carry considerable risk to the firm and branding. Learn some of the new electronic marketing channels, the advantages and disadvantages of various electronic marketing channels and uncover the mix of marketing tools that best meet your firm’s needs.

Analysis: This session’s main focus is on *marketing* through technology – not how to operate or use these technological tools, but how the tools can be used to market your firm. Therefore this session holds no CLM credit in the IT Management Category

ORGANIZATIONAL DEVELOPMENT

The following example fulfills 1 hour of CLM credit in the Organizational Development Management Category.

Session Title: 7 Tips to Build a Strong Work Team

Time: 8–9 A.M.

Description: To build a high-achieving work team, first you need to clearly identify and communicate your organization's objectives, then align team members' strengths, egos, and personal interests with those objectives. Discover proven effective strategies to sharpen your team-building skills and maximize team productivity.

Analysis: Although communication skills are a necessary component of team-building, the *main focus* of this session is how to build an effective team and increase team productivity. Team-building is one of the skills under Organizational Development, thus this session qualifies for CLM credit in this Management Category.

Organizational Development focuses on developing effective management and leadership skills that lead people, departments and organizations. It can include: leadership styles & techniques, team development, management principles, and organizational skills such as change management skills, coaching skills, negotiation skills, culture management techniques, conflict management, etc.

The following example does NOT fulfill CLM credit in the Organizational Development Management Category.

Session Title: Grief in the Workplace

Time: 8 – 9 A.M.

Description: Death, divorce, terminal illness: How do successful law firms manage interpersonal crises in the lives of employees and still maintain productivity? During this session, participants will explore the states of grief and appropriate firm responses and procedures, and discuss the psychological, physical, social, economic and spiritual impact of grief.

Analysis: The main focus of this session is on handling employees experiencing Loss, and while this is a very valuable Human Resource skill, it is not one of leadership or organizational development skills under the OD Management Category. It therefore holds no CLM credit towards the general education requirements.

FUNCTIONAL SPECIALISTS

In addition to fulfilling the general education requirements required of all CLM applicants, Functional Specialists must also fulfill an *additional 15 hours of coursework distributed in areas other than the field in which the functional specialist is primarily employed*. **Functional Specialists:** (see job descriptions 2-7 on page 9 of the [CLM Information/Application Packet](#))

Subject Areas for Functional Specialists

(HR) Human Resources Management	(FM) Financial Management	(OM) Operations Management	(LI) Legal Industry/ Business Management
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It is therefore possible to offer a seminar that does *not* qualify for CLM credit for general education requirements – i.e. it does not fulfill one of the five Management Categories – but covers one of the *additional* subject areas needed by the CLM applicant who is a Functional Specialist.

For example, *Finance for the Non-Financial Manager*, is a Financial Management subject which does not fall under any of the five CLM Management Categories, but may be a subject needed by a Functional Specialist such as Human Resources Manager to help fulfill the HR Manager's required additional hours.

This subject could also be used for *recertification* by those who already have earned CLM certification.

RECERTIFICATION

Recertification: Once you earn CLM certification, you must continue your education and recertify every three years. To recertify, you must obtain 36 hours of education, including one hour of Substance Abuse and one hour of Business Ethics. A minimum of three hours per Subject Area is required. These Subject Areas are shown in the chart below.

Subject Areas for Recertification

(HR) Human Resources Management	(FM) Financial Management	(OM) Operations Management	(LI) Legal Industry/ Business Management	(CM) Communications and Organizational Management	Substance Abuse (1hr)	Business Ethics (1hr)
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FREQUENTLY ASKED QUESTIONS

We receive many frequently asked questions about certification. Here is a sampling. If you have questions, please contact certification@alanet.org.

- **Can other seminars that don't have the CLM designation count as CLM credit for the application or recertification? Maybe.**
 - Sessions that qualify for CLM credit for the application at ALA's Annual Conference, Business of Law Conferences, and Retreats, have been designated as such in our brochures and listed on our CLM Credit Form (available onsite and online). Thus, at these ALA conferences, sessions holding CLM credit are already designated and only these designated sessions hold CLM credit for the general education requirements.
 - ALA Chapters, universities, colleges, workshops and others may offer sessions that qualify for CLM credit. One needs only to determine if the session fulfills one of the CLM Management Categories in the general education requirements, or is a subject area for Recertification or towards the additional hours needed Functional Specialists for the application, and is at least 60 minutes in length.

- **Do CLM designated sessions count toward Recertification?**

Yes. All *designated* CLM sessions also fall under the umbrella of one of the Subject Areas. An example is *Electronic Client Service: Extranets* which falls under Operations Management, one of the subject areas that those recertifying need to fulfill.

- **Do CLM sessions count toward the additional hours needed by Functional Specialists applying for the exam?**

Yes. But since all designated CLM sessions also fall under the umbrella of one of the Subject Areas, Functional Specialists have a choice to make. Use *Electronic Client Service: Extranets* for Information Technology (general education requirement) or its subject area (Operations Management) towards the additional hours needed for the application. Remember, all subject areas must be outside the Functional Specialist's area of specialty and must be at least 60 minutes in length.

- **Do Chapter seminars need to get pre-approved for CLM credit?**

No. However, if your chapter is putting on a seminar or a conference but is unsure what counts towards CLM, please feel free to seek advice from ALA headquarters.

- **What counts for Recertification?**

Almost all subjects counts for recertification. See Competencies by Subject Areas on the Recertification page at <http://www.alanet.org/clm/recertification.aspx> for a comprehensive list of the topics that fall under each Subject Area. Note: Sessions need to be at least 60 minutes in length.