



# *Volunteer Handbook*

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This handbook is intended to be viewed in its electronic form for ease of access to the many links to additional resources that are available throughout the document. Suggestions for ways to improve this or any other volunteer-related resource are welcome and should be directed to [volunteers@alanet.org](mailto:volunteers@alanet.org).

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## ADDITIONAL RESOURCES

Additional resources are available at [alanet.org/about-membership/chapters/chapter-leader-resources](http://alanet.org/about-membership/chapters/chapter-leader-resources).

## THIS IS ALA

Starting with just 25 members in 1971, the Association of Legal Administrators (ALA) is now composed of over 8,500 members throughout the world. ALA was formed to provide support to those professionals involved in the operational management of law firms, corporate legal departments and government legal agencies. These individuals direct important areas of law office management, including human resources, finance, technology, facilities and marketing.

ALA members may join chapters that provide local educational activities and peer networking opportunities. [ALA has 86 chapters](#) in 44 states, the District of Columbia, Mexico and two Canadian provinces. The Cyber Chapter has no geographic base.

### ***Vision Statement***

As the role of law firm business leaders has grown, evolved and become more complex, so must the Association that represents them. To meet the challenges of this transformed legal industry, ALA has adopted a vision for the organization:

*ALA is the premier professional association connecting leaders and managers within the legal industry. We provide extensive professional development, collaborative peer communities, strategic operational solutions, and business partner connections empowering our members to lead the business of law.*

### ***Goals***

To achieve this vision, we have adopted four goals:

1. **Member Value:** Design a member experience that is meaningful, accessible and personalized.
2. **Diversity, Equity, Inclusion & Accessibility:** Embrace and advance diversity, equity, inclusion and accessibility in our Association and the legal industry.
3. **Education & Professional Development:** Become the industry source for relevant learning and development.
4. **Influence:** Elevate the visibility of the Association and advocate for legal management professionals.

Additional information regarding [ALA's Strategic Direction is available on the website](#).

## BYLAWS

ALA's bylaws can be found [on the website](#). Chapter leaders are cautioned not to confuse ALA's bylaws with the [Model Chapter Bylaws](#). When updating chapter bylaws, chapters should use the Model Chapter Bylaws as a guide.

## ASSOCIATION GOVERNANCE PRACTICE STATEMENTS AND POLICIES

In 1994, the Board of Directors adopted a "policy governance" form of association management. Policy governance shifts the focus of volunteer leaders from volunteer-helper and watchdog to trustee-owner. This governance model emphasizes values, policies, goal setting, accountability for results and empowerment of both Board and staff members.

[ALA's Policies and Governance Practice Statements](#), which are regularly reviewed by the Board of Directors, serve as a foundation for the work of the Board of Directors, Executive Director, volunteer members and staff. They reflect a distinction between the development of vision, policy, direction and desired outcomes ("ends") by the Board, and the responsibility for development and execution ("means") of those ends by the headquarters staff.

## CODE OF ETHICS

To maintain public trust, the legal profession must adhere to high ethical standards. [ALA's Code of Ethics](#) sets forth standards for the ethical administration of legal practices. Legal management professionals at all levels should become familiar with these standards and incorporate them into their everyday performance. They should study and comply with all ethical guidelines of bar associations and law societies that apply in their own jurisdictions. They must take the lead in communicating relevant standards to staff personnel who may be less familiar than lawyers with the ethical guidelines of bar associations and law societies, and in communicating appropriate policies and procedures to lawyers.

Chapters are encouraged to share these standards with their membership annually. This might be accomplished by distributing a print piece at a regular meeting, posting the standards on the chapter's website or publishing them in the chapter's newsletter.

## KEY ATTRIBUTES OF SUCCESSFUL ALA LEADERS

Leadership is the foundation for all organizations. Leaders set high standards for themselves and are an example to those they expect to lead. ALA leaders are ambassadors of the Association and should strive to be their best. In addition to ALA experience, effective and ultimately successful Association leaders aspire to develop within themselves the following attributes: vision, communication, passion for the Association, reliability, inclusiveness, balance, respect and collaboration. Effective leaders mentor others to develop these attributes and become the next leaders.

### ***Vision***

ALA leaders shall possess or develop skills to help facilitate the goals established by the Association. ALA leaders are a primary resource to our members. Their knowledge and skills should bring creative strategies that enrich membership value, as well as promote and educate members on ALA's policies, programs and initiatives. These policies, programs and initiatives are tied to implementing and advancing the current statement of the Association's organizational blueprint.

**Communication**

Effective written and oral communication skills are essential for ALA leaders. ALA leaders should be able to communicate messages of every form in a positive and constructive manner, and they are expected to communicate effectively and respectfully at all times.

**Passion for the Association**

ALA leaders are highly visible to the Association membership and are the example for the membership. They should demonstrate enthusiasm, a positive outlook and the desire to engage members of the Association. An important component of passion is knowledge of the Association, including its vision and mission. ALA leaders should always exhibit a pleasant demeanor and professional behavior.

**Reliability**

Whether working on a project for the Association or dealing with a question or problem from a chapter or member, attention to detail and responsiveness to requests are imperative for a successful ALA leader.

**Inclusiveness**

Diversity, equity, inclusion and accessibility are core values of ALA and a responsibility of each of its leaders. ALA leaders are expected to reflect the Association's commitment to diversity, equity, inclusion and accessibility. They encourage diverse groups of individuals — both within the Association and in the legal community — to be involved in ALA leadership and activities. Through diversity, equity, inclusion and accessibility, we build a better organization, and we provide a positive experience for our membership and the community.

**Balance**

Keeping things in balance is important for a successful ALA leader. This is true in everyday situations as well as when dealing with conflict, change and other difficult situations within the chapters and the Association. ALA leaders should demonstrate the ability to remain unbiased and professional in all circumstances.

**Respect**

Respect for others is an integral part of any successful organization. ALA leaders are expected to show respect for others in the Association and in the community, as well as demonstrate self-respect at all times.

**Collaboration**

The ability to work together as a team and present a united message is critical to the success of the initiatives and goals of the Association and the Association itself. ALA leaders should put aside personal preferences and speak with one voice to facilitate and promote the mission and Plan of Work of the Association.

## **ROLES AND RESPONSIBILITIES OF ALA VOLUNTEERS**

**International Board of Directors**

ALA is governed by a [Board of Directors](#) that, along with key staff members, meets regularly throughout the year to discuss Association business. The Executive Director serves as an *ex-officio* (nonvoting) member of the Board. Board positions include President, President-Elect, Immediate Past President and between 9 and 12 Directors from the membership at large. Directors serve three-year, nonrenewable terms.

The Board serves as the link to all ALA members. They will keep members well-informed of the strategy and vision of the Association by providing communication to ALA leaders, committees, project teams, task forces, chapters and members at large.

### ***Chapter Resource Team***

Members of the [Chapter Resource Team](#) (CRT) assist in the development of creative strategies that promote and educate members on the policies, programs and initiatives of ALA, including providing support and resources to chapters and their leaders. In addition to serving as mentors to chapters, team members serve as subject matter experts, and they are interested in the further development of their own leadership skills. Unless selected to complete the balance of an unfilled term, CRT members serve a two-year term and may renew once.

### ***Committees, Project Teams and Task Forces***

Committees, project teams or task forces are created to help the Board execute specific projects or tasks or, where appropriate, implement strategy and policy. Committees will be used sparingly as a resource for the Board and to ensure consistent, efficient and timely development of Association strategy and policy.

Task forces and project teams will address short-term needs or projects of the Board and are typically disbanded upon the completion of those tasks or projects. Committees will exist to address ongoing or longer-term needs of the Board. All committees are reviewed annually to determine ongoing need.

The Board:

- Will identify the intent, expectations and authority of each committee, project team or task force.
- May grant a committee the authority to speak or act for the Board for a specific and time-limited purpose.

Committees:

- Focus their work on implementation of Association strategy and policy, rather than the over-identification of organizational parts.
- Serve as a resource to staff, but do not direct or exercise authority over staff.

In keeping with the Board's broader focus on strategy and policy, committees will normally not have direct dealings with current staff operations beyond working directly with the assigned staff liaison. However, in collaboration with staff and/or at the direction of the Board, committees may be delegated responsibility for execution of specified tasks or means-related activities.

Project teams and task forces are intended to:

- Focus their work on discrete projects or tasks as assigned by the Board.
- Serve as a resource to staff, but do not direct or exercise authority over staff.

[Committee descriptions](#) and [position descriptions](#) for each role are available on the website. Members and nonmembers may serve on ALA project teams and committees, pending Board approval. Task forces are typically made up of currently seated Directors.

The Board has full oversight of and responsibility for the various committees and project teams, with the committees being accountable directly to the Board. The Board is responsible for the appointment and

removal of members to the committees as well as the appointment and removal of the chair and vice chair.

A [Board liaison](#) is assigned to every committee and project team. The liaison should check in regularly with the committee and will report back to the Board on committee work. The Board liaison does not participate in in-person committee meetings; however, they generally participate in committee conference calls.

### ***Chapter Officers***

Chapter Officers are responsible for effective management of all chapter activities. They work closely with the Chapter Resource Team and ALA headquarters to ensure recognition of the chapter and its members and are responsible for maintaining contact with those individuals in order to keep local members apprised of international activities.

### ***What the Headquarters Staff Expects from Chapter Volunteers***

Headquarters relies on volunteers to keep them informed of chapter matters that warrant staff attention or awareness. Among other things, these include changes in chapter officers, membership application problems, other matters affecting the records at headquarters and unresolved/continuing conflicts or issues in chapters.

## **ROLE AND RESPONSIBILITIES OF ALA HEADQUARTERS**

### ***Executive Director***

The Executive Director is accountable to the Board acting as a body, and their authority is delegated by the Board through its vision, mission, strategic plan, plan of work, budget and policies.

Decisions or instructions of individual Board members, representatives or committee members are not binding on the Executive Director except in rare instances when the Board has specifically authorized such exercise of authority.

In the case of Board members, representatives or committee members requesting information or assistance without Board authorizations, the Executive Director can refuse such requests that, in the Executive Director's judgment, require a material amount of staff time or funds or are disruptive.

### ***ALA Staff***

ALA employs [nearly 20 professional staff](#), and all are willing to field your request.

Chapter leadership inquiries should be directed to the [chapter's president](#) or [chapters@alanet.org](mailto:chapters@alanet.org).

Each ALA committee, task force and project team is assigned an ALA staff liaison (in addition to a Board liaison). The ALA staff liaison is the communication agent from the committee/task force/project team to ALA headquarters. Committees/task force/project teams should include both the staff liaison and Board liaison in all committee communications.

### ***Working with Headquarters Staff***

ALA's [governance practice statements](#) outline the roles, duties and relationship of the Board, Executive Director, committees and staff in great detail. These statements are reviewed and amended from time to time by the Board of Directors.

Another helpful resource is an article authored by Susan S. Radwan, CAE, titled “Relationship-Building.” This article, published in the January/February 2015 edition of *Associations Now*, outlines these five basic dos and don’ts:

**DO follow your chief executive’s lead.** Because CEOs are accountable for positive board relations, they determine the best communication channels to staff for fulfilling board requests. Many chief executives choose to be the direct link between the board and staff in all matters. Ask your CEO about their preference and heed the response.

**DON’T give staff assignments.** That is, unless you have a specific contact person, such as a committee liaison or administrative assistant to the Board. By asking staff to do something, you may undermine the CEO’s priorities and accountability.

**DO resist the urge to criticize or compliment staff directly.** If a performance problem concerns you, express it to the chief executive. When a compliment is due, ask the CEO to deliver it to the appropriate parties on your behalf. When you single out one person for praise, you may harm team morale.

**DON’T intervene if a staff member approaches you about a problem with the CEO.** The person is likely trying to do an end run around the boss. If you get involved, you undermine the employer-employee relationship. Instead, redirect that staff person to their immediate supervisor to resolve the issue.

**DO keep relationships with staff professional, not personal.** When Board members befriend staff members, the latter can easily misconstrue and feel as though they have special privileges. This could cause them to lose sight of the proper employer-employee relationship with the CEO and undermine the board’s work.

Questions or concerns regarding the volunteer/staff relationships can be directed to [ALA’s Executive Director](#).

## COMMUNICATIONS TO AND FROM ALA HEADQUARTERS

### ***Email Communications***

All [Board members](#), the [Executive Director](#) and [headquarters staff](#) members are accessible via email.

### ***Headquarters Communication***

Communication with ALA headquarters is easy! All staff members have direct telephone numbers, voicemail and email access. You are not required to know your party’s extension to leave a message for a particular staff member. For immediate assistance, you can reach a Member Services associate between 8:30 a.m. and 5 p.m. Central, Monday through Friday, at 847-267-1252. After-hours calls are taken by an automated attendant with voicemail options.

## FINANCIAL RESPONSIBILITIES — ALA COMMITTEES AND CHAPTER RESOURCE TEAM

Headquarters will pay approved invoices for committee and Chapter Resource Team activities. Headquarters is responsible for all recordkeeping, audit and tax reporting, and therefore the original invoice for payment is needed.

The ALA staff will disburse and account for funds consistent with Board-approved plans of work and will provide regular and ongoing reports to the appropriate individuals.



### ***Chapter Resource Team Planning and Budgeting***

With assistance from ALA staff, the Chapter Resource Team will develop an annual activity plan of work and budget. Both are submitted to the Board of Directors for approval and may be amended by the Board if necessary.

Upon approval, the plan of work and budget will guide all Chapter Resource Team's activities and regulate all expenditures of funds for the relevant fiscal year.

### ***Committee Planning and Budgeting***

With assistance from ALA staff, committee chairs develop an annual plan of work for their respective committees. The plan of work is approved by the Board of Directors. The Board may amend the plan if necessary.

Upon approval by the Board, the plan and budget will be the committee's plan of work, integrated with the overall ALA plan of work and budget. It will guide all committee activities and regulate all expenditures of funds for the relevant fiscal year.

### ***Approval of Expenses***

Reimbursement requests and invoices are processed for payment within the customary window of 30 days or fewer. Exceptions can be granted upon request.

## **CHAPTER VISITS**

The Chapter Resource Team is often called upon to visit chapters. In most cases, a chapter visit would be conducted virtually and include an ALA-related presentation to the chapter board and/or membership. In-person chapter visits are permitted with prior approval from the chair of the Chapter Resource Team. Expenses for these visits are typically covered by the chapter; however, ALA does set aside a modest budget each year to fund visits to chapters with limited funding.

## **BOOKING TRAVEL FOR ALA BUSINESS**

Airline tickets may be purchased directly with airlines, through websites such as Expedia or Orbitz, or through your own travel agent. (Travel agency and/or booking fees are not reimbursable.) You may be able to take advantage of ALA's special programs with Delta, United and other airlines. Discounts are available for official ALA meetings such as the Chapter Leadership Institute, the Annual Conference & Expo and other in-person conferences. Other airline discounts may apply depending on meeting locations. Additional details regarding travel for these events is typically provided to participants in the weeks leading up to the event.

Refer to [ALA's Volunteer Travel Policy](#) for further details on ALA business-related travel.

## **CALENDAR OF EVENTS**

ALA's [calendar of events](#) is updated regularly. This calendar provides information on Association events as well as other organizations' activities that may be of interest to members.

## **LAW-RELATED ASSOCIATIONS**

ALA has established formal and informal connections with a number of law-related associations. Together, ALA and these organizations identify and implement projects, programs and ideas that will benefit members in each group. Examples include providing speakers for one another's conferences,



authors for one another's publications, cobranding and/or cross-selling of one another's products, and exhibiting or advertising at one another's events. A list of [ALA's Strategic Alliance Partners by Chapter](#) is available.

## COMMUNITY CONNECTION

The mission of [Community Connection](#) is to encourage ALA chapters, its members, firms, business partners, relatives and friends to come together to contribute time, energy and resources toward improving their own communities. Chapters may hold their service project on a designated weekend or in a specific month, or they can conduct several initiatives throughout the year.

## DISASTER RELIEF/ASSISTANCE

As a 501(c)(6) organization, ALA is not positioned to collect or disseminate funds for disaster relief, nor would funds donated through the Association qualify as charitable donations. In the event of natural disasters such as hurricanes, earthquakes, tornadoes and floods, or acts of terrorism, chapters and members who wish to provide financial assistance are urged to do so through organizations that were created to handle relief efforts (e.g., the Red Cross or UNICEF).

## AWARDS PROGRAM

ALA's [Awards Program](#) provides several opportunities for individuals, chapters and other law-related organizations (including business partners) to be recognized for their efforts on behalf of ALA and the legal community. Questions regarding these programs can be directed to [awards@alanet.org](mailto:awards@alanet.org).

### ***Presidents' Award of Excellence***

ALA's [Presidents' Award of Excellence](#) aims to encourage chapters to take effective and collaborative action in support of ALA's mission to promote and enhance the competence and professionalism of legal administrators and all members of the legal management team, improve the quality of management in law firms and other legal service organizations, and represent professional legal management and managers to the legal community and to the community at large.

### ***NextGen Leader Award***

[The NextGen Leader Award](#) recognizes members who embody the essence of the [ALA Code of Ethics](#) with their accomplishments, leadership qualities and the impact they are making within their legal organization, the legal industry and the Association. These individuals demonstrate conviction, dedication and relentless pursuit of personal and professional excellence through their engagement, advancement and influence in early interactions with ALA. Examples of this impact may include volunteering to support an initiative, activity or event-related program or project at the chapter or international level; joining a committee or task force; serving as a chapter officer; recruiting new members; or introducing innovative new ideas to elevate ALA's visibility and relevancy at the chapter and/or international levels. [Contest guidelines](#) are available on ALA's website. Recipients are identified by a joint task force made up of members of the Chapter Resource Team and Board of Directors.

### ***Elevate ALA Award***

[The Elevate ALA Award](#) recognizes up to three recipients whose efforts in professional development, networking, visibility and inclusion are exemplary. These efforts should demonstrate advancement in the following areas:

- Professional development content
- Relationships between legal management professionals and their peers, as well as legal management professionals and business partners
- ALA's prominence in the legal community
- Diversity, equity, inclusion and accessibility (DEIA)

This award is open to chapters, individuals, law firms, legal departments, business partners and other organizations in the legal community. Recipients are identified by a joint task force made up of members of the Chapter Resource Team and Board of Directors.

### ***Outstanding Association Volunteer Award***

Some may think of this as a “volunteer of the year” award, but the basis for the award is not limited to service an individual has provided just during the prior year. Recipients have been recognized for service on particular projects or ongoing volunteer efforts, and generally such service or efforts are at the international level. There are no specific criteria for this award beyond what is stated here. [View a complete list of recipients here](#). Recipients are identified by a joint task force made up of members of the Chapter Resource Team and Board of Directors.

### ***Spirit of ALA Award***

This award is not necessarily presented each year. The award is presented to “those whose commitment to professionalism, dedication to the advancement of law firm administration and record of long-term service to ALA sets the standard for all who aspire to achievement, excellence and success.” The complete criteria for the award and a list of prior recipients are [available](#). Recipients are identified by a joint task force made up of members of the Chapter Resource Team and Board of Directors.

## **ALA MARKETING MATERIALS FOR EVENTS**

ALA has [marketing materials available in electronic format](#) for chapters to use during shows or other events. Materials are formatted so that they can be printed locally by the chapter if desired. Contact [marketing@alanet.org](mailto:marketing@alanet.org) with any questions or if alternate file formats are needed.

## **FOUNDATION OF THE ASSOCIATION OF LEGAL ADMINISTRATORS**

The [Foundation of the Association of Legal Administrators](#) was formed by the ALA Board of Directors in 1981. The Foundation's mission and goals extend to the development and presentation of educational programs, research on the changing legal workplace and increasing awareness of the value of law firm administrators. The Foundation seeks to complement ALA's directives and initiatives of advancing the legal management profession through its activities and projects.

## **ALA LEADERSHIP SELECTION PROCESS**

Volunteers are vital to the success of the Association, and each member is encouraged to participate. Individuals interested in serving in a volunteer role are encouraged to update their member profile. To do so, navigate to the *My Account* button in the upper right corner of an ALA webpage and select *Account Details*. Once there, navigate to the *Share My Expertise* tab and make the appropriate selections based on your interests. Be sure to click *Save* at the bottom of the page before navigating away. ALA headquarters staff will reach out to prospective volunteers based on the interests indicated in this area when volunteer opportunities arise.

Questions regarding this process or volunteer service in general can be directed to [volunteers@alanet.org](mailto:volunteers@alanet.org).

**Note:** Service on ALA committees and/or project teams is generally open to ALA members, business partners or other interested parties whose knowledge, skills and expertise are deemed useful to a specific project. To complete the application, navigate to the *My Account* button in the upper right corner of an ALA webpage and select *Account Details*. Once there, navigate to the *My Participation* tab and complete the application. You may go back to the application to make edits or simply update it. Nonmembers interested in serving as a volunteer should reach out to [volunteers@alanet.org](mailto:volunteers@alanet.org) for additional guidance.

### ***Nominating Committee***

The Nominating Committee is responsible for selecting ALA's President-Elect, Directors and Chapter Resource Team.

The committee consists of:

- ALA's President (who chairs the committee)
- ALA's Immediate Past President
- ALA's President-Elect (who serves as a nonvoting member)
- Up to 12 members-at-large

Except for the President, Past President and President-Elect, members of the committee cannot be currently serving on the Board of Directors and shall not have served on the Board of Directors during the three years prior to their appointment. They also cannot be considered candidates for President-Elect, Director or Chapter Resource Team for the coming year.

The committee's efforts begin with a conference call, usually held in September, and culminate in a formal meeting in November. It is at that meeting that the next President-Elect and Board of Directors are selected. Within a few days thereafter, the currently seated Board will ratify the appointments of the Chapter Resource Team for the coming year.

## **ALA COMMITTEES**

### ***Composition***

ALA's bylaws grant the Board of Directors the authority to establish or discontinue regular or special committees or councils. Committees assist ALA in meeting the needs of the membership and moving the Association forward, while maintaining a focus on our mission, vision and goals.

Committee chairs, vice chairs and members are appointed for fixed, nonrenewable terms as defined by the position descriptions established for each role. Membership on committees is open to any member, business partner or other interested party whose knowledge, skills and expertise is deemed useful to the work of the committee.

Each committee is assigned a Board liaison, whose role is to serve as the link between the committee and the Board of Directors, and a staff liaison, whose role is to assist the committee with various administrative tasks.

### ***Standing Committees***

Terms for these individuals commence and conclude at the Annual Meeting of the Association, typically

held in conjunction with the Annual Conference & Expo. Each committee will have a chair and vice chair, as appointed by the Board. The vice chair should work closely with the chair to ensure effective leadership succession planning. Being appointed as chair or vice chair does not extend an individual's term of service unless the Board expressly approves an extension.

#### *Event Planning Committees*

The work of these committees begins in the months leading up to the event and ends upon the conclusion of the event being planned. Each event planning committee is led by a chair.

#### ***Call for Volunteers and Selection Guidelines***

Each standing committee usually has at least one membership opening per year. When openings are anticipated, headquarters staff will issue a call for volunteers through the ALA website, publications and various social media channels. Included in these communications will be a description of the position(s) available as well as instructions on how, and by when, to express interest.

Peer-to-peer communication is often viewed as the most effective means of recruitment particularly when seeking individuals to serve in volunteer roles. For that reason, it is critical that each committee take an active role in soliciting expressions of interest for open positions.

Both the Board liaison and the staff liaison will work closely with the chair through the recruitment process. Staff will forward the names of prospective volunteers to committee leaders shortly after the submission deadline has passed. Committees/project teams should develop a clear set of desired skills, traits and/or areas of expertise that would prove useful to the work of the committee. Committees/project teams should refer to the [Key Attributes of Successful ALA Leaders](#) throughout the process and follow the recommended interview outline provided by staff.

Once interviews have been conducted, the committee should discuss their findings and identify their preferred individuals. The written recommendation, which will be developed by the chair in collaboration with the Board liaison and staff liaison, should rank *all* interested individuals in order of preference. Once finalized, it will be presented to the Board for consideration. As per ALA's bylaws, the President shall then appoint the chair and the members of the committees and project teams subject to a majority vote of approval by the Board.

Upon approval by the Board, all interested parties will be notified of the final decision. These notifications are typically made via phone by a member of the Board; however, that task may be delegated to the committee chair. As soon as all notifications have been made, both the Board and the committee's staff liaison should be informed that the process is complete.

A brief orientation conference call should be held in the weeks following the notification. This call should include the chair, vice chair, staff liaison, Board liaison and all new committee members. Staff liaisons should have sample agendas on file from prior orientation calls.

#### ***Vacancies***

Committee vacancies are filled on an as-needed basis, with the new committee member filling the remaining portion of the vacant position. Individuals filling a vacancy of less than 16 months may express interest in serving a full term of their own if they choose.

#### ***Serving in Multiple Volunteer Roles***

It is the goal of ALA to encourage participation in Association activities and to broaden the opportunities for individual members to hold leadership positions in the Association. It is also the goal of ALA to

encourage leadership development through individual exposure to multiple areas of ALA activities, programs and responsibilities. To facilitate both opportunity for participation and broad-based leadership development, the Board has [an established policy regarding service in multiple volunteer roles](#).

### ***Committee Minutes, Reports and Plan of Work***

At the beginning of each committee meeting (conference call or in-person), one member of the committee or the committee's staff liaison should be assigned to take minutes of the meeting. Minutes should generally be prepared using the [standard minutes template](#). Draft minutes should be distributed shortly after the meeting (ideally within one week), first to the committee chair for initial review and then to the entire committee. The ALA staff liaison is responsible for maintaining the historical committee minutes, which should be stored in the committee's Online Community Group.

Each standing committee submits a report to the Board every six months (at the end of July and mid-December). The report should detail the committee's work during the past six-month period and follow the [standard reporting template](#). It should also address any issues or concerns the committee would like the Board to address.

In addition to the committee reports, on an annual basis, each standing committee will prepare a plan of work detailing how the committee work aligns with ALA's goals. These annual plans of work should follow the standard template and be developed in collaboration with both the committee's Board and staff liaisons. Plans of work are to be submitted for review by the Board in the first quarter of the year and will take effect during the Annual Meeting of the Association, typically held in conjunction with the Annual Conference & Expo.

### ***Committee News and Marketing***

Short articles and content regarding committee activities can be included in ALA's publications and/or social media, provided that the following contribution guidelines are followed:

- Articles should fall between 200 and 350 words.
- Articles are written in third-person voice on behalf of the entire committee.
- Articles follow the ALA Style Guide. (Available on request from [publications@alanet.org](mailto:publications@alanet.org).)
- A headline is included.
- Text is submitted in Microsoft Word format to [publications@alanet.org](mailto:publications@alanet.org), with a copy to the committee's Board and staff liaison.

All articles will be reviewed by ALA's editorial team and scheduled within two to six weeks of receipt.

## **PERFORMANCE OBJECTIVES FOR CHAPTERS**

Every ALA chapter is held to a set of standards established by the ALA Board of Directors. These [Chapter Performance Objectives](#) promote effective chapter management by encouraging chapters to meet the professional development needs of their members and adhere to essential financial and legal responsibilities.

The objectives encourage chapters to plan effectively and set annual goals that support [ALA's Strategic Direction](#), develop collaborative efforts to strengthen the flow of information through all levels of the Association and promote unity throughout the Association.

Every chapter is required to attest to its compliance with these objectives as part of the chapter compliance initiative that occurs annually (usually in July).

## CHAPTER BYLAWS

Each chapter has its own set of bylaws that guide its operations. Chapter leaders are cautioned not to confuse ALA's bylaws with the [Model Chapter Bylaws](#). When updating chapter bylaws, chapters should use the Model Chapter Bylaws as a guide.

Bylaws can become outdated, and at times modifications may be needed to address a particular need or desire. Some sections must match the model verbatim. Other sections can be customized or modified to suit the chapter's needs. The Model Chapter Bylaws can serve as a guide, and headquarters staff can help chapters determine which areas should match and which areas have more flexibility.

If changes are needed, proposed revisions should be submitted to [chapters@alanet.org](mailto:chapters@alanet.org) for review before a chapter vote. Chapters should allow 5 to 10 business days for review, although most can be performed in less time. Once the review is complete, you will be notified either 1) to proceed with a chapter vote to adopt the proposed amendments in accordance with the chapter's current bylaws, or 2) to make additional modifications before proceeding with a vote. After the final vote has been taken, the chapter should forward an executed copy of the newly adopted bylaws to [chapters@alanet.org](mailto:chapters@alanet.org).

### ***Compliance with ALA International Bylaws***

[ALA's bylaws](#) state that "all members of a chapter must be members of the Association." This is an important requirement because ALA is a single organization whose structure involves a "parent" of international scope and many local chapters. Both the international organization and the local chapters play important roles in education, networking, programs, benefits and other services to legal administrators. Chapters receive their charters from the parent organization, operate under its umbrella and receive benefits and support through its volunteer leadership and headquarters staff. This system places mutual obligations and responsibilities on the parent organization and its chapters, as well as on individual members. As a result, chapter presidents must verify annually that all the chapter's members are also members of ALA.

This annual process usually begins in May with a notification to chapter presidents that includes a certification form to be signed, dated and returned. Along with the certification form, chapter presidents are sometimes asked to provide a copy of the chapter's current bylaws. If the bylaws are requested, they will be reviewed to ensure the chapter's membership criteria is neither more nor less restrictive than ALA's and to ensure other necessary language is present. As practices often change, it is important that chapters keep this document current and in general conformity with the [Model Chapter Bylaws](#).

Questions regarding compliance practices or bylaws should be directed to [chapters@alanet.org](mailto:chapters@alanet.org).

## INCORPORATION, TAX RETURNS AND LEGAL MATTERS

### ***Incorporation***

All ALA chapters should be incorporated as a not-for-profit corporation. If a chapter is not incorporated, each of its members may be individually liable for the obligations of the chapter. By incorporating, only the assets of the chapter can be reached to fulfill legal obligations; the members' personal assets are protected.

### ***Tax Return Requirements***

Effective for taxable years beginning in 2007, all U.S. chapters must file a federal tax return. The question of what federal tax form an ALA chapter must file is affected by both a) whether it has



obtained federal tax-exempt status, and b) its total gross receipts for the taxable year. More information regarding [tax return requirements for U.S. chapters](#) is available.

### ***Antitrust Guidelines***

All volunteers must be knowledgeable about [antitrust guidelines](#) and must see that these guidelines are observed at all meetings and programs, in publications and in listservs and/or discussion forums.

At least annually antitrust guidelines should be shared with chapter members, which can be accomplished by including them in the chapter's newsletter or discussing them at a chapter meeting.

## **LEGAL SERVICES**

From time to time, chapters may need to seek legal advice, particularly on contractual matters and sometimes on tax and incorporation issues as well. Local firms (particularly those with an ALA member) will usually donate moderate amounts of time to assist or advise the chapter. However, if the chapter has questions regarding bylaws or survey reviews, contact [chapters@alanet.org](mailto:chapters@alanet.org). If necessary, legal counsel will be retained at no charge to the chapter. Chapters are responsible for retaining local counsel for matters not related to bylaws or surveys.

## **CHAPTER GUIDANCE**

### ***Chapter Leadership***

The most common chapter officer structure includes the following positions:

- President
- President-Elect and/or Vice President
- Secretary
- Treasurer
- Immediate Past President

(Note: Some chapters combine duties such as Secretary and Treasurer into one position.)

A number of chapters also have officer or “extended board” positions, such as:

- Membership Chair
- Newsletter Editor
- Education/Program Officer
- At-Large Director(s)
- Diversity, Equity, Inclusion and Accessibility Chair

Sample chapter officer job descriptions are available in the [Chapter Leader Resources](#) section of the website.

### ***Continuity***

A common problem in chapters is the feeling of “lost time” between the election of officers and the implementation of programs and ideas of the new officers. Chapter officer “crossover” meetings or retreats can be helpful in jump-starting the year. Notebooks, officer manuals or related materials can also help to move the transition along. These may include:

- Job descriptions
- Long-range plans
- List of accomplishments
- Required tasks

The [Chapter Playbook Template](#) is available and may be a useful reference during these transitions.

### ***Term of Office***

The standard term of office is one year. Chapters are urged to hold elections before ALA's Annual Conference & Expo. This allows the new slate of officers to participate in chapter leader meetings at the Annual Conference and to become acquainted with ALA Directors, members of the Chapter Resource Team and headquarters staff. Additionally, the incoming chapter leaders should consider participating in training opportunities provided by ALA headquarters to better acquaint themselves with their leadership responsibilities and roles.

### ***Operating Year***

Because the dates of ALA's Annual Conference & Expo vary from year to year, it is recommended that chapters use April 1 as the start of each operating year. This will provide for a more effective working relationship between ALA and the chapter and allow new chapter officers to participate in conference activities developed specifically for them.

### ***Nominations and Election Procedures***

The election process varies significantly among chapters. Some chapters use ballots mailed prior to their annual meeting; others elect officers more informally, such as with a show of hands. However, most chapters conduct an annual business meeting to handle the necessary administrative affairs of the chapter.

Most chapters have Nominating Committees composed of members elected by the membership and/or appointed by the chapter's Board of Directors. Usually one current officer or a member of the chapter's board serves on the Nominating Committee. The slate of officers selected by the Nominating Committee is presented to chapter members who are qualified to vote at a time specified in the chapter's bylaws or policies.

## **CHAPTER COMMITTEES**

Each chapter committee should have a written statement of purpose, and goals should be established each year. Committees serve two major purposes in an organization: to provide a structure for focusing activity and to accomplish specific goals and to encourage more members to become involved in the organization. Chapter presidents often establish and assign members to committees, although committee chairs will also play a role in selecting committee members. The chapter's bylaws usually state whether committee chairs are voting or nonvoting members of the board. In addition to the standing committees, chapter presidents may form temporary committees or task forces to study a particular issue or to plan a one-time event.

## **CHAPTER MEETINGS**

### ***Board Meetings/Agendas***

Effective meetings occur when board members receive the previous meeting's minutes and an agenda of the upcoming meeting in advance. Agendas may include:



- Approval of the minutes of the previous meeting
- President's report and announcements
- Treasurer's report
- Committee reports
- Association-wide news
- List items
- Other business

### ***Reports***

Each officer should be prepared to make a brief report at each board meeting, and the Treasurer should distribute a written financial statement at each board meeting. The Chapter President should notify other officers when or if special or written reports will be required.

### ***Minutes***

It is essential that written minutes be kept and approved for each board meeting. The format of minutes may vary, but all minutes typically contain the following:

- The date, time and place of the meeting
- The names of board members present, the names of those who were absent and the names of any guests in attendance
- Establishment of a quorum
- Approval of previous minutes as distributed and/or amended
- For each report or topic, summarized concisely under a separate heading:
  - The subject of the question or report
  - Any discussion
  - Any action or decision
- The date, time and place of the next meeting
- The time the meeting adjourned
- A copy of the agenda and any written reports to the minutes
- Signature of the Secretary at the end of the report

The chapter's Secretary should maintain a permanent copy of all minutes. Copies of all chapter board meeting minutes should also be uploaded to the Resources tab in the chapter's Online Community.

### ***General Meetings***

Most chapters have regular educational meetings on specific topics and may include outside speakers, ALA member speakers and roundtable discussions. Chapter business can and should be communicated through the chapter's newsletter and/or during the opening segment of the educational meeting. Chapters should, however, have at least one business meeting a year. This usually is the meeting when new officers are installed.

This meeting often includes:

- Highlights of the year's accomplishments (outgoing President)
- Goals for the coming year (incoming President)
- Financial status of the chapter (outgoing Treasurer)

Members should be encouraged to provide feedback and suggestions at this meeting.

Education is the heart of ALA. Establish goals with fellow directors at the beginning of the year. Be sure

your chapter structure can support these ambitions. Try to spread the activities carefully so you don't have too many demands at any time. Plan educational programs well in advance so the year is varied, balanced and interesting.

An annual member interest survey can be helpful in developing interesting program ideas, and ALA's Annual Conference brochure contains a full selection of subjects to draw from. A sample survey is available in the [Chapter Leader Resources](#) section of the website.

### ***Promoting Meetings***

Meeting attendance is one of the best ways to promote membership and recognition of your chapter. Promotion of meetings is one of the most overlooked aspects of chapter organization. With so much competition for time, it is difficult to get people to attend even the best of meetings. It is important to get current members, as well as prospective members, to meetings on a regular basis. Remember that members become "prospects" at dues renewal time. Attendance at several good meetings during the year will make retaining members in the chapter easier.

Suggestions for retaining and attracting chapter members:

- Announce your chapter meetings or programs. Send releases to your local bar publications and newspapers. Be sure to include time, date, location, reasons to attend, contact name and phone number. Note who is invited to attend the activity (e.g., legal management professionals, managing partners, nonmembers, etc.).
- Invite managing partners to a chapter meeting/luncheon so they can become more familiar with the workings of ALA.

Consider a "Suppliers' Day" that features your chapter's supporting business partners. It may include tabletop exhibits that allow each business partner to display literature, sample products or services, as well as complimentary education sessions delivered by business partners in their areas of expertise.

## **CHAPTER LEADER TRAINING**

Each year ALA hosts its Chapter Leadership Institute (CLI), a two-day leadership and training program designed for current, incoming and future chapter leaders. Chapters are strongly encouraged to send at least one officer representative to CLI — ideally, the person who is serving as President-Elect at the time of the event. Other chapter leaders are welcome to attend at the chapter's discretion. CLI sessions focus on a wide array of chapter management issues such as:

- Developing new and effective chapter leaders
- Designing high-quality chapter programs
- Membership promotion and retention
- Special events (managing partners' dinners; business partner seminars; chapter retreats)

ALA also hosts Essentials of Chapter Leadership (ECL), a three-day virtual training event held in the first quarter of the year. This event is intended to provide incoming chapter leaders with basic instruction on chapter management as well as information on the importance of adhering to essential financial and legal responsibilities. One registration fee for the chapter allows for unlimited members of the chapter to attend.

Chapter leadership events are designed to be motivational and informative, and they provide unique

opportunities for chapter leaders to share ideas and solutions and to learn important chapter management details. Chapters are strongly encouraged to participate in these workshops.

Questions regarding chapter leader training should be directed to [chapters@alanet.org](mailto:chapters@alanet.org).

## CHAPTER LEADERS' ONLINE COMMUNITY

The [Chapter Leaders Online Community](#) Group allows chapter leaders to share information and exchange ideas relating to chapter operations. There are no fees to participate, and all chapter leaders are encouraged to join this community group.

## CHAPTER WEBSITES

The majority of ALA chapters have developed websites. A website is your chapter's public face and is a vital asset to help attract new members and build awareness of your local presence. ALA headquarters includes links to chapter websites in appropriate sections of [alanet.org](http://alanet.org) to help prospects, business partners and new members reach out to learn more. Be sure to refer to the [Chapter Website Guidelines, License Agreement](#) and [ALA's Identity Standards Guidelines](#) when developing or redesigning your chapter's site.

To make developing and launching a website more efficient, ALA headquarters has created an [ALA Chapter Theme for WordPress](#). The theme allows your chapter members to use their ALA credentials to log in to your chapter website. Once logged in, members have access to a chapter roster, chapter blog posts (which they can comment on) and other members-only information you choose to create. Your members will also have direct access to their ALA account information, the ALA Online Community and members-only content on the main ALA site. You and your chapter webmaster can learn more by contacting [chapters@alanet.org](mailto:chapters@alanet.org).

All new and redesigned chapter websites must be approved by ALA headquarters prior to going live. Contact [chapters@alanet.org](mailto:chapters@alanet.org) with questions or for approval of your chapter's website.

### ***Website Content for Your Chapter***

Looking for additional content for your website? You can now link *Legal Management* articles on your website [using a custom script](#) that will automatically update each time a new issue is released.

## INSURANCE

ALA provides general liability insurance and professional liability insurance at no cost to chapters. Directors & Officers Liability, Crime Insurance, Cyber Liability and cancellation insurance are available for purchase by chapters in good standing. The summaries below are not meant to replace the actual policies. In the event of any conflict or ambiguity between the policy and the summary, the policy applies. General questions regarding insurance, including requests for Certificates of Insurance, should be directed to [chapters@alanet.org](mailto:chapters@alanet.org).

### ***A Note from the Insurance Carrier***

Chapters hosting events at which alcohol will be served must require a Certificate of Insurance from the vendor furnishing the alcohol evidencing proper coverage as well as ALA as an Additional Insured.

### ***General Liability Insurance***

This coverage is provided to all chapters at no cost. General liability insurance covers ALA-sponsored events (such as meetings, retreats and conferences) against third-party losses from bodily injury and/or

property damage. If an event venue requires proof of insurance and/or to be listed as an additional insured, contact [chapters@alanet.org](mailto:chapters@alanet.org). The coverage extends to losses from bodily injury/property damage, damage to premises rented to you and host liquor liability. (Standard terms and conditions apply.)

ALA's program carries liability limits as follows: \$1 million combined limit of liability for bodily injury and property damage per occurrence subject to a \$2 million annual aggregate; products/completed operations liability aggregate is included in the general aggregate. In addition, a \$5 million umbrella liability policy is in force.

### ***Professional Liability Insurance***

This coverage is provided to all chapters at no cost. Professional liability insurance provides coverage for any act, error, omission, misstatement, misleading statement, neglect, breach of duty or personal injury tort actually or allegedly committed or attempted by an insured in the performance of or failure to perform professional services. Professional services are solely in the performance of providing chapter management services, complimentary programs and educational programs in the area of legal administration and promoting information regarding administration and management issues for others. Personal injury tort includes libel, slander, defamation, wrongful entry or eviction, false arrest, malicious prosecution or invasion, infringement or interference with rights of privacy.

### ***Cancellation Insurance***

Cancellation insurance is insurance that a chapter can purchase to protect itself from loss of revenue resulting from the cancellation of a major meeting, conference or event. These policies cover weather, strikes, fire and earthquakes (except California locations), but they do not cover war. Coverage for earthquakes is available at an extra cost. The premium for cancellation insurance is based on a percent of the projected gross revenue, by using a base, plus considering such factors as when and where the event will take place. Chapters need to decide what they are trying to protect and whether the risks merit the need for this type of insurance.

### ***Crime Insurance***

Crime insurance offers chapters protection against theft, embezzlement, social engineering fraud or other criminal misappropriation of funds. Any chapter in good standing may purchase this insurance through ALA during the open enrollment period. Chapters that purchase this coverage have the added benefit of the deductible being covered by ALA if the chapter actually suffers a covered loss.

### ***Directors & Officers Coverage (D&O)***

D&O coverage is available for chapters to purchase through ALA's provider. It offers the board members of each chapter protection from written demands for monetary or nonmonetary relief, civil or criminal proceedings against the board for actual or alleged acts, errors, omissions, misstatements, misleading statements or breaches of duty. Coverage also extends to Personal Injury or Publishers Liability (false arrest, wrongful detention, libel and slander, infringement of copyright or trademark, etc.) This coverage provides defense and indemnification costs and protects the personal assets of the individual board member.

### ***Cyber Liability***

Cyber Liability provides coverage for Privacy & Security Liability, Media Liability, Regulatory Proceedings, Breach Notification, Computer and Legal Experts, Betterment, Extortion, Data Restoration, Public Relations, Business Interruption and System Failure.

## REPORTING CHAPTER NEWS

To keep ALA members informed about activities and events, updates about chapter activities regularly appear in *BOLD Bites*, *Just the Facts* and *Legal Management*, on ALA's social media accounts and on ALA's website. If your chapter has a story to share, please send an email with the details (and photos, if available) to [chapters@alanet.org](mailto:chapters@alanet.org) for potential inclusion in future ALA publications.

## SURVEYS

Many chapters conduct surveys that are beneficial to members. The most popular of these are Compensation and Benefits Surveys, Equipment Surveys and Membership Surveys.

### ***ALA Compensation and Benefits Surveys***

ALA headquarters publishes two annual compensation and benefits reports every fall: the Compensation and Benefits Survey and the Large Firm Key Staff Compensation Survey.

Chapters are requested to encourage chapter members to participate (at no cost) in the surveys during the summer, usually June and July, by providing data for collection. The subsequent reports include national averages as well as data specifically for any state or metropolitan area with sufficient participation.

ALA members receive a significant discount when purchasing the final reports, and survey participants receive an *additional* discount plus access to an online dashboard to run customized reports specifically benchmarking their office locally and nationally.

[Information about the surveys can be found here](#), and questions should be sent to [compsurvey@alanet.org](mailto:compsurvey@alanet.org).

### ***Chapter Compensation and Benefits Surveys***

It is important to have ALA headquarters review Chapter Compensation and Benefits Survey questionnaires each year prior to dissemination. This review will protect the chapter and help minimize risk for potential claims of antitrust. It is possible this review could take several days, particularly if ALA's legal counsel is asked to assist in the review. Survey questionnaires should be sent to [chapters@alanet.org](mailto:chapters@alanet.org) for review.

Before developing their own Compensation and Benefits Survey questionnaire, chapters are encouraged to study the [ALA Antitrust Guide](#).

Basic concepts to keep in mind when developing this type of survey include:

- ALA's legal counsel recommends against the collection of billing rates, as well as attorney or associate salaries.
- The reported data should include only past, historical information that is preferably at least three months old. Instructions should specify the information being sought is for a 12-month period ending prior to the dissemination of the survey questionnaire.
- The raw data must be collected and tabulated by an independent third party (such as an accounting firm) that will maintain the confidentiality of individual firms' data. A confidentiality agreement should be entered into with the consulting/accounting firm. This agreement should be executed every time the chapter uses the firm, even if it is the same firm year-to-year. Refer

to the [sample confidentiality agreement](#), which addresses the following issues:

- There should be one independent source for collection of the data.
- The collected data should be maintained internally (by the third party).
- The collected data should be made available only to those who need it while working on the project.
- The collected data should be destroyed after the survey is completed.
  
- The results must be presented in a confidential manner. Data should be aggregated, averaged or distributed in composite form consistent with the purpose of the statistical program but that conceals the identity of individual firms.
  
- *Participants*  
All law firms or law offices that could be construed to compete with one another should be allowed to participate by providing their economic data and obtaining the averaged results, compiled and presented so as not to permit identification of any individual participant's data. Participation in the program should be voluntary, and no auditing should occur. Nonmembers should be allowed to participate. Nonmember participants can be charged a higher amount for participation, but the higher amount must be directly related to the costs of producing the economic survey.
  
- *Nonparticipants*  
Parties who do not participate in the survey and cannot be construed as competitors of the participants do not have to be provided the results of the survey. Limiting the results to the participants tends to encourage participation. Some participants do not wish to have the averaged data made available publicly. Therefore, if the data is to be sold to nonparticipants that intention should be made clear at the time the survey questions are submitted to participants. If nonparticipant sales are to be made, it is suggested that charges to members and nonmembers not differ substantially. Since competing law offices and firms could have participated and received the data at the amount charged to participants, the costs to nonparticipants are not legally limited.
  
- *Trade between chapters of completed information*  
If the information is available to participants only, the information cannot be traded. If the information is not limited to participants only, then the finished product is available for sale or trade to anyone. Individual participant data may not be sold or traded.
  
- There should be a number of participants submitting data — preferably at least five — in order to eliminate any reasonable possibility of identifying or estimating individual firm data. While members may discuss data collection and dissemination procedures, discussion of the actual data by Association members should be avoided.
  
- The chapter should not provide any analysis of the data, nor should it make any recommendations relevant to the subject matter of the data.
  
- Business surveys and similar data prepared by governmental agencies may be reproduced and disseminated.

### ***Equipment Surveys***

Most chapters structure Equipment Surveys using the “directory” approach that contains a listing of the various makes/models followed by an indication of which firms utilize them. The directory structure allows chapter members to contact users of specific types or brands of equipment for additional information. There should be no attempt to rate or evaluate the equipment or business partners. Headquarters does not need to review equipment surveys.

### ***Membership Surveys***

Many chapters find value in performing Member Interest Surveys. The information gathered can help the chapter determine a variety of needs and wants from its members. These surveys are usually shorter in length than other surveys and take relatively little time for members to complete. Questions can include preferences for times and days for chapter meetings, professional development, special events, features of the chapter newsletter, and special program ideas and topics. Membership surveys do not need to be reviewed by headquarters.

Similarly, ALA conducts two biennial surveys for full membership: a Member Needs Assessment and a Volunteer Needs Survey. Questions are relatively consistent in order to understand trends about what is important to and valued by membership and specifically volunteers. Chapters are requested to encourage participation among chapter members to ensure that all voices are heard. Questions regarding the Member Needs Assessment should be directed to [membership@alanet.org](mailto:membership@alanet.org). Questions regarding the Volunteer Needs Survey should be directed to [volunteers@alanet.org](mailto:volunteers@alanet.org).

### ***Sales Tax on Surveys***

Are ALA chapters liable for sales tax when they sell surveys? The answer depends on the applicable laws of the state in which the chapter is located — and there is no uniform answer. As a general rule, however, the sale of surveys is taxable. The final determination on whether the chapter is liable for sales tax needs to be made by competent local counsel familiar with the sales tax laws of your state. A legal opinion on [Allocating Expenses to an Unrelated Trade or Business](#) is available.

## **ACTIVITIES AND OUTREACH PROGRAMS**

### ***Managing Partner/Corporate Counsel Events***

Activities provide the chapter opportunities to offer programs of interest, promote ALA and network. Many chapters conduct managing partner events on an annual basis. The purpose of this event is to provide a program that will be of interest, an opportunity to become more familiar with ALA and networking.

The activity should be carefully organized to encourage attendance and portray the chapter in its best light. Avoid technical or self-serving topics. It is advisable to form a committee to coordinate the activity. Dinners are usually held in a private dining room of a first-class hotel, business club or restaurant.

A typical program would include:

- Cocktail reception
- Dinner
- Brief ALA announcements and introductions
- Keynote speaker



Suggested speakers:

- Legal management consultants
- Educators
- Psychologists
- Judges or political figures
- Economists

Topics of interest:

- Marketing and client development
- Economic trends and financial management
- Conducting effective firm retreats

Be sure the chapter's name appears on the invitation and not simply "Association of Legal Administrators." It should be noted the expenses for such an event can be much higher than an average chapter meeting. The chapter may want to underwrite some of the expenses (e.g., the cocktail reception) and charge less for attending the event than the actual costs. A budget is needed that includes anticipated expenses and revenues.

### ***Business Partner Programs***

There are two types of business partner programs frequently sponsored by chapters:

- Business partner shows (with tabletop or booth space exhibits)
- Seminars for business partners to the legal community

If you allow business partners to use your logo, please see the sample agreement (located in the [Chapter Leader Resources](#) section of the website) designed to protect your chapter's intellectual property.

**Business partner shows:** Making exhibit space available to local business partners at special chapter events accomplishes several objectives:

- Significant revenue can be produced from the fees.
- Good relations can be established with the business partners.
- Members can increase their knowledge of the products and services available.

Exhibit booth contracts for chapter events should include a "hold harmless" clause protecting the chapter, ALA and the venue.

**Seminars for business partners:** Some chapters have had much success in sponsoring educational seminars to help business partners understand how to work effectively with law firms and law firm administrators. Business partners are invited to attend as registrants, not as exhibitors, and a panel of legal management professionals from firms and legal departments of various sizes presents the program. Some chapters have a second panel of business partners speaking to the administrators in the audience on how to work more effectively with business partners. Lists of business partners to invite to participate in such programs can be developed through a survey of chapter members.

Each chapter must decide whether its goal is to break even, make a profit or even lose money. With good planning and good publicity, activities can be a success story.



As with all other functions of this magnitude, it is helpful to establish a committee to concentrate on the planning of any business partner programs. The budget, program and publicity must be given careful consideration. [ALA Antitrust Guidelines](#) should be followed in dealing with product development issues. It is always recommended that proper arrangements are made with the exhibit hall or hotel for adequate electrical power and internet access.

### ***Retreats***

Chapter retreats may be locally held one-day “idea exchanges” or full weekend events in a resort-type setting. A retreat format allows members to spend more time on topics that can only be treated superficially at regular chapter meetings. Some chapters use outside speakers for a portion of their program, or they invite a member of the Chapter Resource Team to attend.

It is recommended that a committee be formed to plan the retreat. Successful retreats will have a budget, adequate publicity and a good agenda. Retreats provide networking in a more relaxed environment and can provide chapter members with opportunities for social events.

### ***Bar Liaison Activities***

One of ALA’s success indicators of the [Strategic Direction](#) is to develop awareness and credibility of ALA as key influencer in the legal industry, which can be accomplished by increasing the visibility and credibility of the Association through liaison with the bar and other law-related associations at the local, state and national levels. A chapter’s Bar Liaison Committee may be the catalyst for co-sponsored activities with the bar association, which may include:

- Seminars
- Compensation surveys
- Equipment surveys
- Cosponsored publications, programs or activities
- Speaker exchanges

Often when bar associations agree to cosponsor events, they are lending their name to the event and publicizing the event to their members though they may not share in a proportionate amount of the work. This arrangement can be quite successful because ALA gets broader exposure and may be able to make those initial inroads to the local or state bar group.

When entering into joint agreements, be sure that both parties have a clear understanding of their responsibilities and how the expenses and profits of the program will be distributed.

### ***Internship Programs***

Internship programs provide valuable hands-on experience for students. Participation in these programs looks good on résumés and gives the student a pertinent reference source for potential employers. Member firms benefit from participation by filling short-term staffing needs (at minimum, if any, cost) and by the opportunity to evaluate the intern for possible employment without any obligation. If there are no nearby internship programs in your area, encourage educators to start them. Good internship programs benefit interns, schools and member firms.

### ***Advisory Board***

Members are encouraged to serve on program advisory boards when requested. This can be your opportunity to improve the quality of potential employees. Most boards rarely meet more than a few times each school year, and the educators are delighted to have input from the professional community

on curriculum, technological trends and new programs.

## **OUTREACH TO COLLEGES AND UNIVERSITIES**

Outreach programs have the potential of increasing the visibility and credibility of member firms, the profession, the chapter and ALA. Chapters that have sponsored educational outreach programs have done so to:

- Increase the number of students consciously seeking a career in the legal field.
- Improve the quality and diversity of prospective employees coming into the job market.
- Clear up misconceptions regarding the community's legal sector.
- Increase contacts that might allow members to evaluate new graduates for potential employment.

Your total chapter membership represents a cross-section of the legal community and has members with expertise in the areas of law office management, human resources, accounting, business administration, and systems and technology. Most frequent questions include:

- What kinds of career opportunities does the legal community offer?
- What training or special skills are needed for each?
- What is the difference between large firms, small firms and corporate law offices?
- What changes are being made in the law office as a result of technological advancements?
- What curriculum changes should be considered to reflect new trends?

Through these contacts, you may also be able to reach local chapters of state and national professional organizations, such as Business Teachers Association, Business Educators Association, Guidance Counselors Association or Placement Directors Association. A digital version of ALA's brochure [Your Career in the Business of Law](#) is available.

[Sample letters and programs](#) are available in the Resource section of the Chapter Leaders Online Community.

## **MEMBERSHIP CRITERIA**

Any individual with an interest in legal management may apply for ALA membership, provided their employer is not eligible to join forces with ALA as a business partner. Chapter leaders are encouraged to actively recruit and welcome all eligible professionals employed in legal management roles, including:

- Overall Management
- Financial Management
- Operations Management
- Technology Management
- Human Resources Management
- Legal Project Management
- Legal Marketing Management
- Legal Pricing Specialists
- Legal Process Management
- Corporate Law Department Management

- Government Legal Services Management
- Education Law Department Management
- Consultants to the Legal Industry
- Nonprofit Legal Service Organization Management
- Bar Association Management
- Law Department Management of Nonprofit Organizations
- Retired Legal Management Professionals
- Students

Chapter leaders should familiarize themselves with the criteria as outlined in [ALA bylaws](#). Contact [membership@alanet.org](mailto:membership@alanet.org) with any questions pertaining to membership eligibility.

### APPROVAL PROCEDURES FOR ALA MEMBERSHIP APPLICATIONS

To ensure consistency and uniformity in eligibility determinations, the following procedures apply:

1. All prospective members shall be instructed by ALA and its chapters to apply online — the secure, preferred method to join. A printable application may also be completed and mailed directly to ALA as outlined on the current application form.
2. If an ALA application is sent to the chapter instead of ALA, the chapter will immediately forward the application and dues payment to ALA, selecting the appropriate address as outlined on the current application form.
3. [ALA's Membership Department](#) processes all membership applications. Eligibility questions are referred to and resolved by the Executive Director, who may consult with other members of ALA headquarters staff. Chapter leaders may be contacted if additional information is deemed necessary.
4. Notifications regarding newly approved members will be sent from headquarters to the appropriate chapter president (or one designee) on a regular basis.
5. Newly approved members have **provisional approval status** for the first 30 days, during which period the chapter has the ability to contest the member's eligibility status as determined by ALA. Refer to the [ALA Policy](#) for Chapter Review of Provisionally Approved Membership Applications for more information. Contact ALA's Membership Department at [membership@alanet.org](mailto:membership@alanet.org) or call 847-267-1585 for assistance.
6. Once a chapter leader is notified that an individual has been provisionally approved for membership, the new member may then be invited to join a chapter. Pursuant to ALA's and all chapters' bylaws:
  - a. Chapter membership may not be granted before ALA membership has been approved.
  - b. All members approved by ALA are eligible (but not required) to join a chapter.
7. New members are listed as Independent until ALA's Membership Department has received authorization from the Chapter President (or designee) to assign them to the chapter. Authorizations may be sent by email to [membership@alanet.org](mailto:membership@alanet.org) or by calling membership staff at 847-267-1585.

## ORGANIZATIONAL PRICING OPTION

In addition to the traditional Individual member, [Organizational Pricing](#) is an optional dues model that's based on the total number of attorneys across an entire organization, including all office locations in any country. It delivers better value for organizations of all sizes and offers the ability to extend ALA membership to all legal management professionals who can benefit from ALA's resources — without any additional dues payment required.

Individual members under the Organizational Pricing option retain all the same benefits of ALA membership. Chapter Quarterly Reports denote Individual (Regular) members as RM and Organizational Pricing participants as GM in the category field.

The enrollment window for current ALA members to participate in Organizational Pricing is open from August 1–September 30 each year. Organizations with no current ALA membership representation may enroll throughout the membership term.

[More information on Organizational Pricing is available on the ALA website.](#) Contact [membership@alanet.org](mailto:membership@alanet.org) with additional questions.

## RECRUITING AND RETAINING MEMBERS

### ***Membership Development Toolkit***

A [toolkit](#) is available to assist chapters in identifying successful tactics for recruiting and retaining members. This resource and more are found in the [Chapter Leader Resources](#) Membership Development section.

### ***Finding and Recruiting New Members***

- Use business directories to search for legal management professionals by management function area and/or managing partners.
- Request a list of independent members by email to [membership@alanet.org](mailto:membership@alanet.org).
- Create a digital, print-friendly chapter brochure that explains the benefits of belonging to a local chapter.
- When you provide a prospective member kit, it should contain the following and may be transmitted by email, mail or in person:
  - A cover letter explaining the benefits of membership
  - An [application](#)
  - A [membership brochure](#)
- Develop enticing campaign offers on chapter dues, products and/or services.
- Conduct periodic membership campaigns (such as member-get-a-member, extended term, contests, prizes).
- Participate in periodic member recruitment campaigns conducted by ALA headquarters.
- Get the ALA name and chapter name out as much as possible using public relations strategies and tactics, such as media relations, social media, events and speaking engagements.
- Promote meetings/events through the media; consider advertising.
- Offer a free lunch or invite the prospective member to a chapter meeting.
- Invite prospective members to a webinar. Be sure to provide them with member information.
- The dropped members report (distributed by headquarters each April) lists firms that may be replacing departing individuals in legal management positions. Make calls to the firms to get replacements' names and send prospective member materials.
- Use the prospective members report (from headquarters) and follow-up to make sure materials

were received by the prospect, answer questions or provide additional information. Determine if the prospect is interested in joining a local chapter.

- Seek assistance from successful chapters or contact the [Chapter Resource Team](#) or [ALA headquarters](#). All are eager to help promote ALA.
- Work with business partners to reach their nonmember customers who qualify for membership.
- Set up managing partner breakfasts/luncheons/dinners.
- Schedule business partners' seminars.
- Add prospects from above tactics to distribution lists, including newsletter.
- Maintain social media presence locally and on [ALA LinkedIn, Twitter, Instagram and Facebook pages](#).
- Tweet chapter highlights with #ALABuzz.
- Comment on industry social media posts, such as @attnyatwork and @PinHawkHappens, with #ALABuzz.
- Comment on, like and/or retweet posts from @LegalMgmt, @FoundationofALA and @ALABuzz.
- With permission, consider posting speaker presentations to [Slideshare](#) with chapter information.
- Optimize search results by including links to [alanet.org](#) and other partners and encourage partners to link to chapter website.
- Check your chapter roster on a regular basis (at least quarterly) to ensure all chapter members are still ALA members.

### ***Using the Phone***

The phone can be a very useful tool in building membership in your chapter. However, if misused it can have a negative impact on your efforts and do more harm than good. Best results are achieved by communicating first through other means and setting an appointment to connect by phone.

Helpful tips for phone use:

- Have auditions among the chapter members to determine who does an effective job and who enjoys using the phone in talking to prospective members.
- Use only qualified members who are knowledgeable about ALA and the profession for phone communications.
- Establish early in the conversation if the timing of the call is convenient. If necessary, call back later or have the prospect call you when it is more convenient.
- Try to get specific actions as a result of your call, such as a commitment to attend the next chapter meeting.
- Remove negative responders from your prospect list.

### ***Follow-Through***

- Once a prospective member has been identified, you should not assume the prospect will initiate further contact.
- Assign a "mentor" to greet and welcome the prospective member and have the mentor follow up with the prospective member before the next chapter meeting.
- Acknowledge receipt of a prospective member's application. This can be via a phone call, letter, postcard or email.
- Develop a new member onboarding program to introduce the new member to everything your chapter offers. Contact [membership@alanet.org](mailto:membership@alanet.org) for more information.

### ***Contests***

One of the best ways to build chapter membership is to get as many current members involved in the membership building process as possible. Contests such as "Be a Member — Get a Member"

campaigns work well for chapters. However, you should not assume that everyone wants to take part in the recruitment effort. Not everyone is (or wants to be) a good salesperson.

Suppliers who benefit from growth in your chapter are often willing and able to offer prize packages such as trips, equipment or supplies to be used as incentives.

### ***Trade Shows or Meetings***

Another effective way to attract and talk to prospective members is at a local trade show, such as through the American Bar Association, a chapter meeting or some similar gathering. Even if you don't sign up a prospect at a trade show exhibit, you have the opportunity of getting names and addresses so that you can follow up with direct mail efforts or telephone contacts.

Promotional, digital materials that describe the legal management profession and ALA are available for use by chapters and may be printed locally. Contact [ALA headquarters](#) for additional information.

Chapters should budget for their own tchotchkes (giveaways).

### ***Membership Participation***

One of the challenges that chapters face is to encourage their members to take an active role in the chapter. To be effective, chapters should utilize the skills and talents of new and willing members. This will reduce burnout and any perceived sense that the chapter is governed by a select few.

Suggestions for member participation include:

- Seek out volunteers — don't wait for them to come to you.
- Follow up when someone expresses an interest in becoming more actively involved.
- Encourage committee chairs to be assertive in getting members on their committees.
- Keep experienced administrators involved by including them as speakers for some of your programs.

### ***New Member Orientation***

Whether new members become active members depends, in part, on the effectiveness of their orientation into the chapter. Suggestions for new member orientation include:

- Personally invite new members to the first meeting, then make a point of meeting them.
- List new members in the chapter's newsletter.
- Introduce new members at the first meeting.
- Assign an experienced member to each new member.
- Involve new members in chapter projects and committees.
- Develop and implement a new member onboarding program.
- Conduct periodic new member orientation sessions. The format for your program might include one-hour lunch or evening sessions and cover an overview of ALA, as well as answers to the following questions:
  - How does the chapter function?
  - Who are the chapter's officers?
  - What activities are planned for the coming year?
- Create a resource for new members to ALA and/or new to the profession that might include:
  - Chapter membership directory
  - List of officers and committee chairs
  - Chapter bylaws



- Chapter calendar of events
- Articles on law office management

### ***Keeping Members Active***

- Involve members in writing articles at local and international levels.
- Involve members as speakers at local and international levels.
- Regularly communicate the benefits of membership.
- Watch for absenteeism, as it can be a warning sign. Follow up at regular intervals in the form of letters or phone calls.
- Welcome new members with a call, email and/or letter. The [membership department](#) at headquarters provides notification of new ALA members in your area as they are processed into membership and on a quarterly basis.
- Don't forget about the unemployed members. They may have extra time now to devote to chapter activities!
- Involve members on committees.
- Offer job bank services for unemployed members.
- Recognize a simple thank you goes a long way! Be sure to thank members for their efforts.
- Have experienced members conduct orientation sessions.
- Follow up on dropped members. Conduct an exit interview to determine:
  - Why did the member drop? Was this an error?
  - What was of greatest/least benefit to the member?
  - Ask for suggestions.
  - Encourage reinstatement of membership — they need us most during the tough times.
- Make sure your chapter is continuing to provide what its members need and deserve by conducting research through roundtables, focus groups and surveys.
- Establish liaisons with law-related associations, schools, etc.

## **MEMBERSHIP REPORTS**

Chapter presidents should use the statistical membership reports distributed by headquarters to maintain accurate chapter records. Follow up with new and potential members is recommended. Membership growth and retention are reported via lists of new, inactive and prospective members. The following are summaries of the various reports.

### ***New Members***

This report lists members who have recently joined ALA. You should add all new members to your records as new or prospective members so that they can begin to receive mailings, etc. You are encouraged to welcome new members by phone call, letter or email — particularly those who have not joined your chapter. (These independent members are assigned a 900 series number that can be found on the report).

### ***Inactive Members***

This report identifies members who, for a variety of reasons, are no longer receiving ALA mail and benefits, even though they still have time remaining on their paid membership. Examples of inactive members are when the member has left the profession, retired, become unemployed without providing a forwarding address or when mail is returned from the firm or post office.

### ***Prospective Members***

This report lists individuals who appear to be eligible for ALA membership and who have contacted ALA for membership information. ALA staff follows up with prospective members who received information

directly from ALA headquarters to answer any open questions and discuss benefits. Chapter leaders are welcome and encouraged to follow up with these prospects as well to make them aware of chapter offerings and ensure they have the information they need to proceed with ALA membership.

### ***Dropped Members***

This report lists members whose ALA memberships have been canceled due to expiration of paid membership. It is important these dropped members are removed from your records as soon as possible so that the chapter remains in compliance with ALA's bylaws. Reports are provided by ALA headquarters annually following the conclusion of the yearly membership renewal period.

### ***Chapter Growth Chart***

This report provides a breakdown of membership growth (and loss) by chapter.

### ***Membership by Firm Type***

This report provides a breakdown of members by employer type (private law firms, corporate legal departments, etc.).

### ***Lapsed Members***

Before the end of the term, all members receive an electronic membership renewal notice, which is followed by multiple reminders. If no action results, the membership lapses, and that individual must reapply for membership. ALA headquarters staff recruits those individuals whose memberships have lapsed, primarily through communications based on a "we want you back" theme.

### ***Chapter Demographics***

Each year in conjunction with the Chapter Leadership Institute (CLI), chapter leaders will receive a spreadsheet providing details about the demographics of the chapter. This information can be used for recruiting purposes and for planning educational sessions.

Contact [ALA's membership team](#) if you have questions regarding any of the reports.

## **REPORTING FORMS**

To serve the chapter and the individual member effectively, ALA needs regular updates from chapters. The following reporting forms should be completed and sent to ALA headquarters while you are in office. Remember to send officer changes to ALA headquarters immediately following elections or as changes occur.

### ***Chapter Officer Reporting Form***

The Chapter President leaving office (or a designated officer) should submit the [chapter officer reporting form](#) immediately following the chapter's election of officers or if there is a change in chapter leadership during the year.

### ***Chapter Profile Form***

Pursuant to the requirements outlined in the [Chapter Performance Objectives](#), chapter presidents are asked to update their chapter profile form annually. Questions regarding this process should be directed to [chapters@alanet.org](mailto:chapters@alanet.org).

### ***Roster Verification Report***

All chapters should be in full compliance with the bylaws provision that "All members of a Chapter must be members of the Association." Certification of full compliance is required on an annual basis. This process is initiated by ALA headquarters in May of each year.



To assist chapters in maintaining compliance, chapter presidents are afforded the opportunity to compare rosters at least twice each year. Roster adjustments should be communicated to ALA headquarters immediately.

## **THE VALUE OF ALA MEMBERSHIP**

ALA is the premier professional association connecting leaders and managers within the legal industry and offers an array of benefits and resources, including:

- Extensive professional development across multiple platforms
- Collaborative and vibrant peer communities
- Engaging and dynamic live and virtual event learning experiences
- Strategic operational solutions
- Business partner connections
- Essential tools, samples and models that save time, money and/or solve challenging daily problems
- Opportunities to grow as a leader and demonstrate mastery in the legal management field
- Sole source to earn the Certified Legal Manager (CLM)<sup>®</sup> Certification

As a chapter leader, practice the “elevator speech” you will deliver to concisely explain the value of ALA membership to any prospect. Find descriptions for these top-level benefits outlined below:

### ***Networking***

- Chapter connections
- ALA Online Community Groups
- Annual Conference & Expo
- Specialty Conferences
- Dedicated social media channels
- ALA Hangouts, Meetups and Roundtables

### ***Knowledge***

- Annual Conference & Expo
- Specialty Conferences
- Chapter Leader Educational Series
- *Legal Management* digital magazine
- *Legal Management* annual print edition
- *Legal Management Talk* podcast
- *Just the Facts* e-newsletter for chapter leaders
- *BOLD Bites* weekly e-newsletter
- *Ahead of the Curve* bimonthly e-newsletter
- e-Learning Courses
- Web-Based Courses
- Annual Compensation and Benefits Survey
- Specialty and general topic webinars
- White papers
- Certified Legal Manager (CLM)<sup>®</sup> Certification and Study Guide
- CLE/CPE Credits (offered for selected programs)
- ALA Roundtable Discussions

## **Resources**

- Online Member Directory
- ALA Career Center and Job Bank
- ALA Diversity Initiative (tools, resources, speakers)
- ALA Reference Library (found in the Online Community)
- Job Description Toolkit, FREE to members (\$399 value)
- Mobile apps for ALA events and education
- Value in Partnership (VIP)<sup>SM</sup> program with exclusive discounts for members through our business partners
- Legal Marketplace business partner listings
- Resource Hubs with topic-specific assets in convenient groups for easy reference
- Peer consultants for personalized and complimentary support
- Chapter and leaders support (substantive educational tools, idea exchanges and workshops to educate chapter leaders)
- Uniform Process Based Management System (UPBMS)

## **ALA's Value in Partnership (VIP)<sup>SM</sup> Program**

Members have the added benefit of [ALA's Value in Partnership \(VIP\)<sup>SM</sup> Program](#). ALA works with many world-class organizations to offer tremendous benefits and savings to members. This means your ALA membership provides you and your firm with resources and services at discounted rates or special services from a reputable group of companies. ALA members, their employers and their families have the opportunity to enjoy the savings these benefits provide.

## **ALA PUBLICATIONS**

### ***Legal Management***

*Legal Management*, the flagship educational publication of the Association of Legal Administrators, features articles on issues of vital importance to legal management professionals, managing partners and others involved in the business side of law. The digital magazine is published 10 times per year through the dedicated [Legal Management](#) website. The website is responsive and works on any device. The magazine covers topics in technological innovations, human resources trends, marketing, financial planning, leadership issues and general business practices. Readers can share the articles through social media and email. Each issue also has a fully designed PDF that can be downloaded and printed.

Since 2016, ALA has produced the *Legal Management* annual print edition. It's printed and mailed out to members every July. It includes original content as well as highlights from the year's digital issues.

### ***BOLD (Business of Law Discussion) Bites***

[BOLD Bites](#) is ALA's weekly e-newsletter that includes top headlines and quick links. It combines ALA news and industry news in an easy-to-read format, so members and business partners get a more thorough overview of what's going on at the Association level and within the legal industry.

### ***Just the Facts***

[Just the Facts](#) is a monthly electronic communication that provides chapter leaders with important information relevant to their duties. Information in the publication can be distributed to members through chapter newsletters or at chapter functions and can also be found on the [ALA website](#). *Just the Facts* is also sent to ALA's Board of Directors and Chapter Resource Team.

### ***Ahead of the Curve***

[Ahead of the Curve](#) is an e-newsletter that has its own page on ALA's website as well as a bimonthly distribution. The content comes from the Professional Development Advisory Committee (PDAC), who identifies and collects articles from various publications to further its goal of sharing timely and topical information regarding the legal industry. ALA staff compiles and updates the e-newsletter on the web and publishes it every other month. *Ahead of the Curve* is meant to provide a spark of insight to assist with your work on behalf of ALA as well as within your firm or legal department.

## **ALA MEMBERS-EXCLUSIVE ONLINE COMMUNITY GROUPS**

[ALA's Online Community Groups](#) help members connect and collaborate with peers on mutual interests and common issues unique to company size and type, functional specialty or niche market, providing access and control over how and when information is received.

The groups offer many great options to allow members to focus or customize their communications, including:

- Discussions with email digest at member's preferred frequency
- File and resource sharing
- Searchable member directory
- Direct message another member privately
- Polling feature
- Video discussion opportunities
- Special interest groups (e.g., First Five, diversity issues, human resources, cybersecurity, small firms, large firm administrators, IP, C-suite officers and more)
- Reference Library with checklists, articles and examples
- Volunteer communities (designated for each committee and project team within ALA)

Chapter Online Community Groups exist for all members of a chapter to privately hold discussions, store files and share information among themselves. Many chapters utilize their ALA Online Community Group instead of a listserv. Chapter presidents designate Online Community Group moderators for their chapter group. Contact [membership@alanet.org](mailto:membership@alanet.org) for more information on using your chapter's online community group.

Online Community resources, including a how-to video, knowledge base, Code of Conduct and more [are on the ALA website](#), or email [membership@alanet.org](mailto:membership@alanet.org) for assistance.

### ***What Volunteer Moderators Need to Know***

As a volunteer, you may find yourself in the position to moderate an Online Community. The [Online Community Moderator volunteer job description](#) provides more information.

#### ***Moderate for Potential Antitrust Violations***

One of the most important duties of a moderator is to be aware of posts that may violate [Antitrust Guidelines](#). Posts that put ALA at risk of violation must be modified or removed. Consult ALA staff for support if needed. Sample language and other resources are available.

#### ***Encourage Respectful Response and Interaction***

The moderator plays a vital role in ensuring posts get responses, and members are interacting in a polite and respectful manner. Be sure to review the [Code of Conduct](#) for additional tips and interaction

rules. Contact [membership@alanet.org](mailto:membership@alanet.org) if you notice anything that may need attention.

### Managing Threads and Posts

As a group administrator, you can create, edit or remove posts. Administrators may also create Announcements that generate immediate email notifications to the group and remain at the top of the group feed in a carousel until removed, or pin a post that will appear at the top of the group posts. Administrators may also create video discussion rooms and events. Community Group Administrators should not alter the global group settings for their groups. Contact [membership@alanet.org](mailto:membership@alanet.org) for more information.

To assist your members in getting started in the Online Community Groups, be prepared to answer some common questions and refer them to the [Online Community ALA website resources](#).

## **General Online Community FAQs**

### **Do I have to log in to view and participate in the Online Community?**

Yes. Online Community groups are restricted to ALA members only, unless a nonmember is a member of an ALA committee or project team.

### **How do I log in?**

Log in to the ALA website with your usual login and password. Then click on the Online Communities “people” icon at the top center of the page. You can also find the direct link under the Networking header on the ALA website.

### **Where does the Online Community get my profile information?**

All your profile information is pulled from ALA’s membership database with some exceptions. Upload your photo and create a biography to share within the Community if you choose.

### **How do I change my profile information?**

1. On any group page, click on your photo or circle initial icon in top right corner and choose “profile” from the dropdown menu.
2. From here, you can make updates to your photo. “About me” and your notification preferences.
3. Click on the camera icon to upload or update your photo.
4. To update your “About me” section, click on the Edit button in that section and save when done.
5. To update your notification preferences, click on the gear icon next to your name. Then, you can set each group that you are a member to either off, Realtime, Daily or Weekly.
6. To update your privacy settings, click on the gear icon next to your name. Then, you can tailor what information is visible and to whom.

### **How do I post a discussion?**

To post a new message, navigate to the group landing page. Once there, you will see your photo or icon and then a message that says: “Post a **message** to the community.” When you click in the box, a pop-up window appears. In the pop-up window, click message, question or poll at the top. Create a subject line, message, add tags and at the bottom choose which group to post the message in. When done, click Post.

## **Following are general rules of engagement for members of the online community groups:**

- Avoid discussing price, compensation or other specifics that may violate [antitrust guidelines](#).
- Don’t attack others or ALA. The discussions on the community platforms are meant to stimulate conversation, not to create contention.

- Don't post commercial messages. Contact people directly with product and service information if you believe it would help them.
- Messages should not contain promotional material, special offers, job offers, product announcements, or solicitation for services.
- Use caution when discussing products. Information posted on any platform is available for all to see, and comments are subject to libel, slander and antitrust laws.
- All defamatory, abusive, profane, threatening, offensive or illegal materials are strictly prohibited and may be removed.
- Do not post anything that you would not want the world to see or that you would not want anyone to know came from you.
- ALA has the right to reproduce anonymous segments of postings to demonstrate ongoing relevant discussions.
- Be courteous. Please ask participants for permission to republish anything elsewhere (especially if elsewhere would be a publicly viewable setting).
- Contact [membership@alanet.org](mailto:membership@alanet.org) with problems, questions or for situation-specific advice.

### **ALA JOB BANK**

[ALA's Job Bank](#) was created to help individuals seeking to secure or fill positions within the legal management profession. This nationwide job bank program brings together prospective employers and employees from every aspect of the legal marketplace. Job listings appear on ALA's website and in a weekly newsletter (subscription required). Blind box service is available to those who desire anonymity. Members and nonmembers may participate in the program, allowing current and former members who are between positions to benefit from the service when they need ALA the most. ALA members receive discounts on ad postings and blind box services. Searching for open positions is always free for job seekers. Questions regarding this program should be directed to [jobs@alanet.org](mailto:jobs@alanet.org).

### **EDUCATIONAL PROGRAM PLANNING OVERVIEW AND ACCREDITATION**

Educational programming should be carried out according to standard adult education practices for a very simple reason — they make sense. By applying these fundamental principles, consistent, high-quality programs are created. Planning is always based on the learning needs of the target audience. Programs are designed using objectives that specify the overall goals of the session and exactly what will be learned in that course. Then, an instructor is selected who is most qualified to teach those subjects in the preferred method. The last step of the process is an evaluation system that measures the extent to which the objectives were met. Based on the information gleaned from the evaluations, the next program will be more effective, and the planning process has come full circle. Refer to the [knowledge, skills and abilities \(KSA\) study](#) for ideas when planning educational programs in the chapter.

Note: ALA headquarters recommends the use of written speaker agreements as a means of clarifying expectations for both the chapter and the speaker.

### **EDUCATIONAL PROGRAMS, SEMINARS AND COURSES**

ALA chapter meetings and programs are the key to the professional development of members. A guest speaker covering a carefully chosen topic can provide fresh insights. Equally important, the exchange of information among members can renew determination and purpose in resolving work-related problems. Developing meaningful programs is important if the chapter is to provide maximum benefits

for all members.

There are a number of techniques for planning a meeting to ensure it becomes a learning event. The following steps are used in developing interesting, timely and informative programs that are responsive to chapter needs:

- Review the competencies identified by the [KSA study](#) for topic ideas.
- Define program topics and the objectives of each program.
- Select and prepare the speaker appropriately.
- Select a facility that provides a conducive learning environment.
- Negotiate fees, expenses and other details with the speaker and with the facility.
- Coordinate meeting logistics.
- Promote the program to members and potential members.
- Evaluate the program and submit the [Individual Session Evaluation Form](#).
- Record details for future reference.
- Enter compiled data from [Chapter Education Summary Report](#) into the [Chapter Education Database](#).

The responsibility for developing and implementing chapter programs often falls to the program director and/or program planning committee. Working closely with the Chapter Board of Directors, program plans and budgets are developed. Relevant, effective programming attracts and retains members. Other program ideas include:

- Develop and publish an annual program plan and budget.
- Work with speakers before, during and after the event.
- Address the various needs of your members, balance the annual program for the novice administrator (as well as the seasoned administrator) and balance programs of general interest with special interest programs.
- Consider regular monthly program meetings, as well as special program events (all-day seminars, retreats, etc.).
- Use outsiders occasionally (college, business, community speakers).
- Trade speakers with other chapters or law-related associations in your area.
- Showcase senior members by involving them in your program planning and presentations.
- Invite potential members to programs and to join ALA.
- [Invite](#) a member of the ALA Board of Directors or Chapter Resource Team to attend.

Different types of professional development forums will keep members active and interested. These might include:

### ***Briefings***

A briefing is a condensed delivery of highly focused information examining one specific topic, covering the maximum amount of information in the minimum amount of time. Usually included are visuals (technology-based programs, such as PowerPoint, charts, models) and handouts. The speaker should be prepared to answer rigorous questions from the audience.

### ***Training***

A training session is a structured developmental program intended to increase the knowledge and skills of the participants in response to a specific needs assessment. Training usually requires at least one-half day and involves exercises, discussions and other interactions.

### ***Presentations***

A presentation usually concentrates on one topic and presents information, ideas and insight, and lasts 60 minutes or more. Opportunities for asking questions should always be incorporated into the program and handouts are encouraged.

### ***BOLD (Business of Law Discussions) Bites***

These presentations are based on the popular TED Talks where presenters discuss practical tips and innovative and provocative ideas for 15 to 20 minutes.

### ***Podcasts or Video Clips***

A podcast or video clip could be 15 minutes in length and consists of 10 scripted questions and answers designed to support a speaker's presentation.

### ***Idea Exchanges***

While guest speakers often add to the importance of a chapter meeting, idea-sharing sessions should not be overlooked. Professional growth is the primary reason members attend an idea exchange. Explore a variety of topics, request objectivity in accepting ideas of other members, and encourage open communication. The success of an idea exchange depends on everyone participating, as well as including the right participants. Consider whether business partners should be included. Idea exchanges serve a number of purposes, including:

- A professional support system for members
- The free flow of information
- An opportunity to improve problem-solving skills
- The right track to multiple sources of information
- The interchange among individuals in specific subject areas
- A safe place to ask for quality help
- An opportunity to learn from leaders in the field

### ***Panel Discussions***

Panel discussions are an effective way to get the views of a number of people on any given topic. When planning a panel session, the responsibility of planning should be assigned to one member. This individual advises each panelist on what they will cover. Each must know what the others are covering. They should construct questions to get the discussion started and ensure that the objectives of the session are covered.

### ***Office Tours***

Some chapters have reported that tours or a meeting where everyone invites their supervisor to learn about ALA and its activities are an effective change of pace.

### ***Seminars***

Local seminars are a way of providing chapter members with in-depth educational information and for raising funds for the chapter. Depending on the topic(s), seminars can be half-day, full-day or multiday events. A seminar may focus on one subject or may be a series of workshops on several topics.

### ***Business Partner Seminars***

The inclusion of business partner displays along with the seminar program can provide an additional source of income to the chapter. Business partner seminars enable business partners to become more familiar with the way a law office works, the role of the administrator and an inside perspective on the "life of the administrator." The intent is to educate business partners, resulting in better working



relationships and a better understanding of the specific needs of administrators.

## **KNOWLEDGE, SKILLS AND ABILITIES (KSAs) OF LEGAL ADMINISTRATORS ASSESSMENT**

The Competency-Based Education/Needs Analysis serves as the foundation for ALA's education and professional development programs, as well as the [Certified Legal Manager \(CLM\)<sup>®</sup> program](#). By obtaining information about job requirements and professional development needs directly from legal management professionals, ALA is able to continue to meet the professional development needs of its members.

The KSA study is sent to a sampling of legal administrators and managing partners in the United States and internationally, and identifies critical tasks performed by principal administrators and, more importantly, the knowledge, skills and abilities (competencies) needed to perform those tasks. The survey also asks which types of education sources are most preferable, what factors contribute to their decision to participate in professional development activities, and about their opinions/reactions to the CLM program.

The results of the study help ALA members and other principal legal administrators, educators and employers develop a better understanding of the depth of the principal administrator's job. The identified competencies also provide an educational roadmap for ALA international and chapter programs. For more detailed information regarding the results of the latest survey contact [profdev@alanet.org](mailto:profdev@alanet.org).

## **GENERAL ACCREDITATION STANDARDS**

Some of the general accreditation standards for program development are:

- The program should contribute to the professional competence of the participants.
- The program objectives, which must be stated in promotional materials, should specify the level of knowledge or competency the participant will be able to demonstrate upon completing the program. The levels are stated as essentials, intermediate, advanced or overview.
- The prerequisites for the program should be stated.
- Programs should be developed by subject matter experts and those capable of designing a quality program who can ensure that the program content be current.
- Programs should be reviewed by a qualified person other than the preparer to ensure compliance with the above standards.
- Program must be evaluated by participants.
- Faculty should be fully qualified by virtue of licensure, academic degree and work experience.
- Copies of handouts, evaluations and marketing materials must be kept on file for a minimum of five years.

Many of the programs at the [Annual Conference & Expo and Specialty Conferences](#) provide continuing professional education (CPE) credit for certified public accountants (CPAs) and continuing legal education (CLE) credit for lawyers, and Professional in Human Resources (PHR), Senior Professional in Human Resources (SPHR) recertification for human resources professionals. Contact [certification@alanet.org](mailto:certification@alanet.org) for more information.



## PROVIDING CLM CREDIT FOR YOUR PROGRAMS

### ***CLM Approved Provider Program***

The [Certified Legal Manager \(CLM\)<sup>®</sup> Approved Provider Program](#) allows qualified ALA chapters and other organizations to self-identify courses that qualify for CLM application and recertification credit. This program is offered at no cost to qualifying ALA chapters.

ALA chapters are not required to become approved providers. Beginning January 1, 2019, only CLM Approved Providers are permitted to advertise education sessions as being eligible for specific CLM credit.

CLM Approved Providers are required to enter all programs into the Chapter Education Database and renew their application annually prior to January 1.

More details about the training required to become a CLM Approved Provider and the online application can be found on the website.

Questions regarding the Certified Legal Manager (CLM) Approved Provider Program can be directed to [certification@alanet.org](mailto:certification@alanet.org).

## SPEAKER LEADS

The [A-List: The Speaker Source](#) is your way to have top-rated ALA speakers present at your next event. You will be able to sort through the topics and descriptions, and ALA will pair up your selection with one of its contracted expert speakers.

Get the full advantages of working with our professional development staff as they help simplify the process, so your event is a success, and you find the perfect speaker for your audience.

Program Benefits:

- Access to highly rated ALA speakers (see speaker database)
- New speakers added throughout the year
- You can browse legal management competency-based agendas to choose a topic to meet your specific needs (see Sample Content Agendas for more info)
- Education for firmwide retreats or chapter meetings
- Full-day, half-day, hour-long sessions tailored to your needs

Contact [profdev@alanet.org](mailto:profdev@alanet.org) with questions or to book a speaker.

## CHAPTER EDUCATION DATABASE

The [Chapter Education Database](#) is a searchable database housing information from educational events presented by ALA chapters. The database may be used by chapter leaders to search for prospective program topics and speakers or types of speakers to consider.

## OTHER EDUCATIONAL RESOURCES

### ***Annual Conference & Expo***

[ALA's Annual Conference & Expo](#) is recognized as the premier business of law educational conference, and meets the needs and interests of the novice, seasoned administrator, generalist and the specialist.

Many of the sessions meet the CLE requirements for attorneys, CPE requirements for accountants and PHR, SPHR, HRCI, SHRM recertification requirements for human resources professionals.

An integral part of the annual conference is the Exhibit Hall. With an average of more than 200 booths and 150 companies represented, ALA's Exhibit Hall is the largest showcase of products and solutions for the legal services industry. Attendees have come to rely on the expo as an important part of their education, and their time in the Exhibit Hall gives them the ideal opportunity to see firsthand the latest in technology, office equipment, management and marketing resources, as well as other products and services for the law office.

Members who are experienced presenters are welcome to submit a proposal for the annual call for presentations. Members may also volunteer as session managers for the educational classes.

### ***Conferences***

Members can expect intensive educational sessions covering both broad-based legal management and specialty topics as well as ample networking opportunities both virtually and in person.

The most up-to-date listing of ALA conferences and events can be found on [alanet.org](http://alanet.org) under *Events* in the top navigation bar.

### ***Certified Legal Management (CLM)<sup>®</sup> Program***

The [CLM Program](#) was created to help raise professional standards, encourage self-assessment and award recognition to those legal administrators who meet prescribed levels of competence and ethical fitness.

The certification process includes educational and experience requirements along with passing an examination that tests knowledge of key competencies. Many chapters have formed study groups to assist their members in preparing for certification.

To create a successful CLM study group be sure to review [ALA's Guide to Developing a Certified Legal Manager Study Group](#).

### ***Special Interest Conferences and Retreats***

The needs of special interest groups are met through specific educational programming. Speaker and panel presentations provide in-depth study on topics relevant to each group. Tremendous networking opportunities are an additional benefit of these programs. ALA offers the following specialty programs. Please consult the ALA website as not all events happen each year.

#### ***Large Firm Principal Administrators Retreat***

This two-day program is where principal administrators from law firms of 100-plus attorneys come together to learn best practices and gain actionable insights that can be immediately leveraged to master the challenges facing large firms today. Presentations by leading experts and discussions with other accomplished law firm executives combine to build management and leadership skills and connect participants to a valuable network of peers.

#### ***Intellectual Property (IP) Conference for Legal Professionals***

The only IP-focused forum for administrators working in a legal practice setting, this two-day program offers unique networking opportunities with peers and business partners in this niche field.

#### ***Law Firm Management Essentials Certificate Program***

[ALA's Law Firm Management Essentials](#) is an online education and assessment program. It is a must

for those new to the legal administrator role.

### **Webinars**

Webinars are presented live by subject matter experts and allow participants to listen by phone and view via the internet. Webinars are also available on-demand approximately one to two days after they air.

### **E-Learning Courses**

ALA offers [e-learning courses](#) through an online learning management system (LMS). The content is delivered via text and graphics, animation, audio and video, quizzes, surveys and games. It presents the latest content on any topic set in a framework of self-directed/self-paced instruction.

### **Web-Based Courses**

[Web-Based Courses](#) are currently offered in human resources and finance. These instructor-led courses meet for one hour each week for six weeks and are also available on-demand. Those who complete both courses in a topic are eligible to receive a Specialist Certificate after successfully taking and passing an exam.

## **CHAPTER NEWSLETTERS**

### ***Why Publish a Newsletter?***

Chapter newsletters provide local and international information about the Association. They offer educational material that will be of interest to the chapter's membership at-large. More than half of ALA's chapters publish a newsletter. These vary in size, length, frequency and the type of information delivered. Some newsletters provide in-depth, thought-provoking, educational articles. Others offer information about ALA and its members. Many provide both. In any case, the newsletter is a positive means of communication among chapter members.

The newsletter can communicate information to chapter members that pertains strictly to them, such as promoting meetings, retreats and conferences, or can be used to provide information about the Association. Some of the information should be related to the Association's mission and should deal with subjects pertinent to chapter members.

A regularly published newsletter can also serve as a reminder throughout the year that members receive benefits from their ALA membership and chapter affiliation.

Many chapters publish a newsletter as a means of creating revenue. Advertising can often support the production costs of the newsletter and may surpass those costs if the production is donated. If you do include advertising, please refer to the legal opinion on [unrelated business income tax guidelines](#).

Whatever the size of your chapter, communication is the goal, and a newsletter is an effective way for that communication to occur.

### ***Electronic Newsletters***

ALA chapters are increasingly moving to publish newsletters electronically. These e-newsletters save chapters money on printing and mailing and offer very timely information. You can also put each edition in a digital archive on your chapter's website or online community, allowing members to peruse issues they may have missed. Sending an email newsletter is a powerful way to stay in touch with your members and prospects regularly. By staying on their radar, they will think of you first the next time they need a product or service your chapter offers.

E-newsletters are often unopened by some members and can also be caught in spam filters. To

maximize readership, it may be beneficial to supplement e-newsletters with occasional print newsletters with key information. To bypass spam filters, it is recommended that chapter members add the e-newsletter sender to their email contacts. If that does not work, the chapter member may have to talk with the chapter webmaster.

## **HOW TO PRODUCE A NEWSLETTER?**

Like all successful projects, the production of a newsletter represents a significant amount of behind-the-scenes effort. Chapters that have been most successful with their newsletters learned the entire process of producing a quality newsletter requires the efforts of many people.

### ***Responsibility***

Once the decision has been made to publish a newsletter, the next step is to organize a team or a committee to produce the newsletter. Many groups assign one person the responsibility for the entire newsletter but find this method is not adequate. Using the team approach does not burden any single individual with a monumental task, and it also provides for the combination of ideas from more than one person in the various aspects of the newsletter. A newsletter team provides continuity if members leave the committee and ensures there will be someone with experience to take over and provide a smooth transition from year to year.

The division of responsibilities may be tailored to the strengths or the interests of the team members. For example, one person could be designated as editor with two assistant editors. The editor would be responsible for the overall publication, and the two assistants could be assigned areas of responsibility, such as soliciting original articles from contributors and scheduling reviews or reprinted material. Another approach would be to have an editor who would be responsible for the content of the newsletter and a publisher who would take the materials supplied by the editor and lay it out, get it printed and see that it is distributed. A third person might take responsibility for selling advertising and handling the advertising artwork.

### ***Scheduling***

Some chapters publish newsletters on a monthly basis, while some publish every other month (bimonthly) or quarterly. Whatever the chapter decides depends on the availability of quality material and the time allowed by the editorial staff.

However, as soon as the schedule has been prepared, it is very important to meet the publication dates. It is frustrating to members to receive the June issue at the end of July because of delays in the publication. While there may be legitimate reasons for the delay, the readers will not be aware of them and may interpret the delay as a lack of interest or competency on the part of the editors.

When the number of issues and the publication dates have been determined, the editor should prepare a publication and content schedule showing the publication date and the deadline for materials to be distributed to all members of the newsletter committee or team.

The next step is to begin to fill in the topics and articles that will be included in each issue. The planning is an ongoing process. Even as one issue is being finalized, material should be flowing to the editor for the next issue, and requests should be made to contributors for future issues.

### ***Distribution***

Who should receive the newsletter? To build a prospective member list, you should stamp or print "complimentary copy for manager" on the front. This is good publicity for your chapter, ALA and the profession. Take special care with the issue and include information about ALA and chapter news.

Make sure you have substantive articles, too. Proofread and layout the mailing carefully — put out the best publication of the year! Consider timing this mailing with an ALA conference or a CLE program in your city.

Your mailing list can be a mix of any of the following:

- Your chapter's official membership roster
- Members of nearby chapters who do not have their own chapter newsletters
- Former members who, for whatever reason, are no longer eligible for ALA membership
- Independent members within your area — ALA members who do not belong to a chapter
- Former chapter members who are still ALA members in other chapters
- All chapter presidents within your area

Copies should also be uploaded to your chapter's online community for viewing by ALA staff and your Chapter Resource Team.

### **WHAT DO I PUT IN THE NEWSLETTER AND WHERE DO I GET THE MATERIAL?**

The chapter or the newsletter committee should prepare specific guidelines for the content of the newsletter in advance. You may also want to give guidelines to the editor for handling features, reprints, section news, book reviews, humor, advertisements, product news, editorials, president's column or other matters that may arise.

#### ***Original Articles***

Having original articles written by ALA members or other professionals is perhaps the single most important responsibility of the newsletter editor. Have specific topics in mind to facilitate the process.

Once the initial contact has been made with a prospective author, the editor should follow up with specific information concerning manuscript guidelines and publication dates. Individuals who are interested and knowledgeable enough to serve on a chapter section committee or national management team are usually well qualified to write newsletter articles. They also know other professionals and speakers who will be willing to write for the publication with little encouragement. Speakers from the [Annual Conference & Expo, the specialty conferences](#) and local meetings may also

be willing to write if asked. Few people will volunteer but, if asked, more than a few will be willing to contribute.

As a courtesy, be sure to send a copy of the issue that carries this person's article to contributing authors — particularly those who are not ALA members. This may help other editors to obtain articles for future issues.

**NOTE:** It is important to provide authors article-length guidelines, either in number of words or number of pages. On average, a typeset page of text will take approximately 500 words. This number will obviously fluctuate depending on typeface, size and the inclusion of artwork. Newsletter feature articles should usually be no longer than one to two pages of the publication. Longer articles can be used as a series or printed in two parts. A single article should not dominate the issue.

ALA's website includes information about ALA happenings and industry news that can be included in a chapter newsletter. Promotional resources, including logo usage, article libraries and the ALA publicity kit can be found [here](#).

### **Newsletter Article Library**

Content in [Legal Management](#) is available for reprint in your newsletters. However, there are a few rules to follow:

- Please always include the following attribution with the article: “Copyright ©2022 [whatever the year it was published] Association of Legal Administrators. All Rights Reserved. [alanet.org](#).”
- No editing or changing of copy is allowed. The article must also be published in its entirety.
- If there is a byline, it must be printed with the article. This includes any biographical information that may appear at the end of the article.
- As a matter of courtesy, send a copy of the reprint in your newsletter to the publication in which it was originally printed.

Questions? Email [publications@alanet.org](mailto:publications@alanet.org).

### **Reprints**

To ensure your chapter is not violating any copyright laws, [contact ALA](#) for written permission prior to reprinting articles, graphics, pictures or magazine covers. ALA members are bombarded with material from professional publications directed toward the legal profession. Reprinting articles often leads to redundancy and detracts from the quality of the publication. If you do decide to use a reprinted article, permission of the author or publication in which the material originally appeared — depending upon who controls the copyright — must be secured. Even for articles not copyrighted, it is a matter of courtesy to secure the proper permission before using the article.

Also, when the article appears in your publication, a permission line should appear with the reprinted article. Usually the person giving written permission will provide the wording they want used, but if they do not, a general permission line reads: “Reprinted with permission from (name of publication), (date of publication).” While it may be possible to obtain permission to reprint over the phone, always get written permission. A [sample contributor’s agreement](#) is available in the Resources section within the Chapter Leaders Online Community.

There are several alternatives to using a reprinted article. If an editor sees an article that appears to have interest for the readers of a chapter’s newsletter, they may contact the author and express an interest in having the author prepare an original article on the same topic that will be specifically slanted toward the readers. The author may be flattered by your interest, and a tailor-made article can be secured for publication.

Another suggestion is to have the editor review the article in book review fashion. This can be an alternative, especially if the article is too lengthy to fit in the newsletter format.

A column or feature header titled “Worth Reading” or a similar title could be used to highlight various articles that might be of interest to the newsletter readers. Or, in an editorial note, attention could be called to particular articles in other publications that are available to administrators.

While reprinting from other publications may be an option for you, reprinting from your publication may be an option for someone else. Your newsletter should also display a copyright notice. The copyright notice is a very simple statement that should appear on the title page (normally the first page) at the bottom. The following form is most common: “©Copyright (Year), Name of Chapter. All rights reserved.” Not only will such notice give protection to contributors to the chapter publication, but it will also provide protection to owners of copyrights on materials that are being reprinted.

Along with the copyright notice, it is important to state your newsletter's policies in each issue. This will help to ensure that contributions fit with your goals and your readers' needs.

It should be noted that whether an original article or a reprinted article appears in your newsletter, proper credit should be given to the author. Be sure to include a byline at the beginning of the article. It is also a good idea to include a brief author bio at the end of the article and often helps the reader understand how the author has the authority to speak on a specific topic. It also allows the reader to go directly to the source of the article with further questions.

### ***Regular Features***

The use of regular features such as editor's and president's columns can serve to provide continuity for the publication. However, this adds responsibility to the already heavy workload of the president and editor. An alternative may be to give the president and editor the option to write when there is something to say rather than having them commit to a column for each issue. This is primarily a decision that can be made by each president and editor individually and does not necessitate a written policy.

Book reviews are an effective way of calling attention to publications that may be of general interest to members. They should be short and designed to call attention to the book and not serve as complete outlines of the book. This column can also be used to call attention to those articles in other publications that may be of interest. (See earlier reference to reprints.)

Several chapters have sections and committees that may have reports or activities. A calendar of upcoming events may be of interest if published regularly. Follow the publication schedule to be sure information about activities and events is published prior to the activity date.

Your newsletter is mailed to your entire chapter membership, so it can be used to conduct surveys and to encourage contributions to the newsletter. You may also want to invite them to offer suggestions for topics or ideas to be covered in future issues.

Other items you may want to consider for your newsletter are:

- **Chapter Board Minutes:** Some chapters include minutes from board meetings to keep members abreast of what the board does. A chapter treasury report can also be run.
- **Member/Officer Profiles:** This is a great way for members to get to know one another.
- **Speaker/Program Reviews:** This can help members who cannot attend the meetings benefit from their membership. It may also encourage them to attend future programs.
- **Individual Member Activities:** Did one of your members just upgrade office technology? Did a member revamp a particular area of the law office that other members may like to know about? This can serve as a valuable resource to members.
- **Welcome New Members/Membership Changes:** This gives new members recognition and keeps members more informed about moves.
- **Chapter History:** It is quite common for new members — and even some not so new — to not know names of chapter founders. Annually, a history of the chapter could be included to remind



members of how it started. It could be written by one of the founders or one of the early members.

- **Q&A Forum:** Allow members to submit questions to the editor who, in turn, can get responses from various members. Responses should be from various size firms, corporate legal departments and private firms.

## **WHAT SHOULD THE FINISHED NEWSLETTER LOOK LIKE?**

The layout and overall appearance of the newsletter is a matter of preference and is often affected by time and costs. The main policy that should be adhered to in deciding the look of your chapter's newsletter is to maintain a professional image that chapter members can be proud of. Also, make sure the ALA brand (i.e., your chapter's logo) is featured prominently and properly.

### ***Masthead***

Whether print or email, the masthead allows a regular place to identify the names (and contact information) of the editor and other members of the newsletter committee. It should give information about when issues of the newsletter will be published, and where to send articles, questions or letters. Many newsletters use this space to print the names and phone numbers of chapter officers. While this is a good place for that information, editorial information is much more important.

### ***Banner***

Thought should be given to developing a chapter logo (see the [ALA Identity Standards](#) and [License Agreement](#)) to be used in the nameplate of every issue of the newsletter. This serves to give the publication character and an identity and makes it easily recognized by those who receive it.

### ***Size***

The standard size for print newsletters is 8.5 by 11 inches, though your printer may be able to help you in choosing a size that fits your needs.

The length of the newsletter can vary with each issue depending on the amount of material available, and even the time of year. Remember, increased size may increase the cost of mailing. Don't be afraid to add extra pages during a particularly active time in your chapter or to cut pages during a slow period. Many chapters are not as active during the summer, so a shorter issue may be better for that time, while fall seems to be more active, and longer issues may be warranted.

Many chapters print their newsletters as self-mailers. There are strict rules about the space that needs to be provided for the label and return address information. Be sure to check with the post office prior to producing your chapter newsletter.

Shorter and fewer articles are recommended for e-newsletters, with the opportunity to link to the chapter website for further information.

To include web links that are easy to use in newsletters, it is recommended to use short web addresses that may redirect to the final destination. The chapter webmaster should be able to help with this.

### ***Paper Stock and Printing***

The quality of paper and the method used to reproduce the newsletter can significantly affect the overall finished product. The use of color or coated paper and scoring (folding) can add to the cost of the publication. Talk to your printer about options available to you in your price range. NOTE: Glossy paper may look more professional, but it is often harder to read. A dull paper, or even a low-gloss



paper, will actually work better for a publication like your chapter newsletter.

### **Quality**

The quality of your chapter's newsletter reflects on the entire Association. Articles that are poorly written, inaccurate, uninteresting or lacking professionalism will reflect poorly on the organization. Be sure to watch for typographical errors, misspelled words or other factors that detract from the finished product. Chapter members should be able to show the newsletter to colleagues outside the chapter, managing partners and other professionals with a sense of pride and a feeling that the newsletter speaks well of the professionalism of the individuals who belong to the organization.

Finished newsletters should be of high quality in content and appearance. Remember, the newsletter represents the individuals involved in its production, the chapter and ALA.

## **WHAT IS PR?**

Public relations (PR) is a way for companies, organizations or people to enhance their reputations and gain awareness and attention. PR usually involves communicating with the media and through the media to present an organization in the most favorable way possible. Print and online media plays a vital role in providing accurate, consistent messages to ALA members, the legal community and the community at-large.

An effective public relations program typically consists of several areas. None of these areas constitutes a PR program by itself; each must exist in some form. These areas are:

- **Promotion:** Attempting to garner support or endorsement for the Association through opinion making.
- **Publicity:** Placing information in the news media, through press releases or events.
- **Public affairs:** Working with community or government officials or legislative or consumer groups to establish community relations.
- **Media agency:** Planning activities or staging events that will attract attention to the Association.

While PR includes all of the above, sending out news releases to local media is the most straightforward approach. To supplement local outlets, there are national services such as [PRWeb](#) and [Legal Support Network](#) that can distribute news releases en masse to relevant media outlets. Please email [marketing@alanet.org](mailto:marketing@alanet.org) if you have questions, and check out some of ALA's [news releases](#) for inspiration. Read the sections "How to Write News Releases" and "Working with the Media" further along in this document for more specific information.

Also recommended is visiting [google.com/alerts](https://www.google.com/alerts) to create and receive email alerts when the chapter, Association of Legal Administrators or any other relevant topic or keyword is mentioned online.

Advertising is not considered to be a public relations tactic. It is a marketing tactic by which one buys time or space for ads and controls the exact message by designing the ad and writing ad copy.

## **WHAT IS PUBLICITY?**

Publicity is the act of attracting the media attention and gaining visibility with the public. Is publicity a column in a local newspaper? A cover story in a national magazine? The mention of ALA in a long story about legal administration or a related field? A single photo in a newspaper or magazine? An annual report? An event listing in a business calendar? Yes, to all the above — and more.

Take a close look at your local newspaper's business section. Most of the stories on those pages are either news releases or stories based on releases. This is the primary place where ALA news releases appear, so the releases must be written to fit the style of that publication.

## **MARKETING PLANS**

Effective marketing is planned; it is not composed of quick-fix tactics or 11th hour decisions. Creating your marketing plan will take time, but the benefits to your chapter (and ALA as a whole) are clearly worth the effort.

Your plan must keep top of mind your members, potential members and nonmembers who may buy your services. Long-term, proactive planning is required. Also critical to your plan's success is the total commitment of your chapter leaders to those goals and objectives.

A single person at the chapter level, a committee of members, an outside consultant or any combination of the above may develop the marketing plan. However, many marketing experts suggest appointing one person who has the overall authority and responsibility for the project.

Key elements of a successful marketing plan include:

### ***Needs Assessment***

Begin with a needs assessment and then listen and respond accordingly. If your chapter hasn't conducted one, use a recent assessment ALA has performed. You will also need to evaluate elements such as trends, competition and SWOTs (strengths, weaknesses, opportunities and threats) as you prepare your plan. Remember to portray the benefits that will be derived from a given product or service versus just the physical product. For example, the message to a prospective member could be networking, in that the membership resource directory will put them in touch with leaders in the profession who have been where they are now.

### ***Target Market***

Another key aspect is determining your target market. We all know that legal management professionals from private law firms, corporate or government legal departments and some legal agencies are eligible for membership. But the following individuals are also eligible for membership:

- Practicing lawyers involved in firm management
- Retired legal management professionals who are not otherwise employed
- Teachers and students at institutions of higher learning

Are there other audience niches that your chapter has not tapped?

Remember to target-market your products and services. Do you have a speaker at an upcoming event who will focus on HR issues? Be sure to craft your messaging to that target market a little differently to focus on the topic of interest.

### ***Marketing Plan Goals and Objectives***

Your chapter's marketing plan should be a living document. Your marketing goals and objectives should be specific, measurable and time defined. Develop your strategies by broadening statements on how you want to achieve the goals and objectives you have set. Tactics will define how you activate your strategies. (Example: Increase our chapter's membership 10% during the next year by conducting a membership drive targeted at lawyers involved in firm management and students at institutions of

higher learning.)

Each primary topic should be listed under headings such as chapter membership, local events, national offerings, etc. A key message for each topic is recommended as well, with all communications relaying that message.

Other considerations, of course, are budget, scheduling (i.e., avoid conducting membership campaigns during periods when chapter leadership is changing) and volunteer time needed to execute a plan.

Evaluate at every stage of the plan. Keep detailed records on what works and what doesn't work. And record why it was or was not successful. Don't be afraid to try new things — loyalty to the old way of doing things can be ineffective.

## **HOW TO WRITE NEWS RELEASES**

A news release is a short news story sent to newspapers and magazines that reports on a current newsworthy event. Include articles about chapter meetings, community events in which your chapter participates, or chapter members who give speeches or receive awards.

Keep in mind that editors are always working on a deadline and will have to read any release that comes across their desk in a hurry. Therefore, the vital elements of the story — who, what, when and where — need to be addressed in the first paragraph. The why and how parts should come next.

The news release should be written in inverted-pyramid style. Begin with the most important fact and move to the least important fact. Write in the third person, from the point of view of an objective reporter describing an event or situation. Don't use "I," "we" or "you." Always refer to the Association or people mentioned by name or pronoun. ("I" or "we" or "you" may be used in quoted material.) Editors will rank news releases and decide which to run based on three key criteria:

- Is it important to our readers? Does it have local significance?
- Is it timely?
- Is it accurate, truthful and complete?

Ask yourself these questions before preparing to send the release. If the news item does not meet these criteria for the publication, it likely will not run. You may have to change the angle of the piece or rely on a different publication for the publicity.

Key points to remember:

- Be sure to include the "who," "what," "when" and "where" in the first paragraph. The "why" and "how" should be addressed in the first or second paragraph.
- Be concise — use short words, sentences and paragraphs. Press releases should be one or two pages maximum in length, double-spaced.
- Be specific and use hard facts, avoiding vague statements.
- Don't use pretentious or "fluffy" words or phrases. For example, don't use the word unique — but be sure to show the reader why something is unique.
- Avoid jargon or technical language. When industry-specific terminology is necessary, be sure to define it clearly.
- When possible, use direct quotes to support the news item.
- Include the release date, usually in a dateline at the beginning of the first paragraph.

- Include your chapter spokesperson's name, address, phone number and email address in a prominent place on the front page.
- Proofread the release — check the facts, look for typos. Is the release neat and clean?
- Use your chapter's letterhead or news release paper for the first page.
- Provide photographs if possible (see section "How to Use Photos"), but always attach captions securely.

### ***Sample News Releases***

Sample news releases are available on [ALA's website](#). The release follows a standard format and includes all the elements of a basic news release.

## **WORKING WITH THE MEDIA**

The secret of success for getting publicity via your local media is knowing and anticipating the media's needs. Building one-on-one relationships with the media is important. This can be accomplished through the following:

- Subscribe to and read key publications. Familiarize yourself with the kinds of information published in each of them and provide stories or news items about your chapter that are of interest to those media.
- Provide accurate, concise information in a forthright and professional manner.
- Call occasionally and talk with the editors. Ask specific questions about how you can help meet their editorial needs.
- Know and meet the deadlines for each publication.
- Responding to media inquiries in a timely and professional manner will help strengthen media relationships and help your chapter achieve its public relations goals. As you develop relationships with the media, they may begin to contact you for information about your chapter's activities or about stories they are writing that relate to the legal profession.

Usually the Chapter President or Chair of the Public Relations Committee acts as your chapter's official spokesperson. Include this person's name and phone number in all materials sent to the media.

### ***Creating a Media List***

Create an up-to-date list of local and regional media that may be interested in your chapter activities. These may include local newspapers, business and law publications (including newsletters), news editors of local radio and TV stations, and online news organizations. Don't forget bloggers who focus on your topic. Avoid the use of names in your list and use titles and current addresses. The name is not nearly as important as the correct title and address.

A good first step in creating a media list is to review the publications you receive at your office. Be sure to include business and legal publications and newspapers. Of those, which cover the legal profession? [Cision's](#) media directories list nearly every daily and weekly newspaper, magazine, radio and television station and blog in the country. The directories include contact names, addresses, telephone numbers and email addresses, and they are available at most libraries.

## **ALA LOGO AND BRAND (IDENTITY STANDARDS GUIDELINES)**

When preparing Association materials, the [Identity Standards Guidelines](#) can answer questions on the correct use of the Association logo and colors, how ALA's name should appear on general correspondence and related identity issues.

## CHAPTER LOGOS

Chapter logos are a great way to identify chapters and to encourage participation with members. The [Identity Standards Guidelines](#) outline design requirements for chapter logos. Be advised that redesigned chapter logos require approval from [ALA headquarters](#) before they may be used. Additional questions should be directed to [chapters@alanet.org](mailto:chapters@alanet.org).

If you allow other organizations to use your logo, see the [sample agreement](#) (located in the Resources section within the Chapter Leaders Online Community) designed to protect your chapter's intellectual property.

## HOW TO USE PHOTOS

A news release stands a better chance of being picked up if you can offer a good photo to go along with it. What makes a good photo?

- A small number of subjects — usually no more than four.
- Subjects close together with a neutral background.
- High-resolution digital photos (300 dpi) are preferred for print newspapers. It is best to know the publication's requirements before sending the photo.
- Avoid cliché shots of people shaking hands or receiving a plaque.
- Whenever possible, have motion in the photo.
- Attach a caption to every photo that identifies your group, individuals in the photo, the activity it is showing and the date it was taken. Be sure the caption is sent with the photo.

Maintain a continuous, up-to-date photo file. Keep photos taken at chapter seminars, conferences and other activities, and of chapter members (or, at least, current chapter officers).

## NONPRINT PUBLICITY

When publicizing your chapter, don't restrict yourself to print media. Even in larger markets, you may find that many radio and TV stations are willing to publicize activities of organizations. This would include:

- Business and financial news editors of the news department
- Talk show hosts
- Producers of public service programming
- Cable TV

A phone conversation or personal contact with these people discussing the chapter and the whole field of legal management can be very worthwhile in achieving exposure for your activities.

Contact [marketing@alanet.org](mailto:marketing@alanet.org) for tips on implementing activities to help audiences gain a better understanding of your group and of ALA.

## DIRECT MAIL

Letters and brochures should be printed on good quality paper by a competent printer. Badly printed or cheap-looking promotions do not achieve desired results. Suggestions for successful direct mail promotions include:

- Develop a good list of prospects. Work with local American Bar Association directories, commercial mailing list sources and [lists provided by ALA headquarters](#) to develop good lists of prospects. A greater level of success is achieved if your list is personalized instead of using a “Dear Legal Manager” approach.
- Determine the goal or purpose of your mailing. Test different approaches throughout the year. If promoting membership, a good frequency is monthly (if the chapter can afford it).
- Keep it short and simple (KISS). Brevity is important in writing direct mail promotions. Good advertising copy, particularly direct-mail copy, requires short sentences and phrases, uncomplicated sentences and picture words (not necessarily long words).
- Timing of direct mail for meeting notices is crucial. You should be prepared to announce your meetings three times: at the beginning of the year, three weeks before the event and, finally, one week before the event.
- Use news releases. News releases should be sent out 10 days before the meeting (two months before for monthly publications).
- Go first class with postage and appearance. Using third-class mail is unpredictable and delays of a week or more may occur. Third-class materials tend to get sorted out or even thrown out in many mailrooms. First-class postage is best for promoting meetings. Have letters and brochures printed on good quality paper by a competent printer. Badly printed or cheap looking promotions simply do not achieve desired results.
- Stress the benefits. The word “you” should appear in any headline. The reader should get at least one solid benefit from the headline. In addition, meeting programs and topics should be simple, concise and specific. Examples are:
  - “How You Can Save Money in Your Word Processing Department” vs. “Economics in the Word Processing Department”
  - “Improve Performance from Your Staff” vs. “Law Office Administration in the New Millennium.”
- Use photographs or artwork. They can add visual impact and interest to your materials.
- Make it easy for people to respond to your mailing. You’ll get better response if you enclose a postage-paid business reply card or envelope in your mailings.
- Document the results of promotional efforts. Testing is an important aspect of direct-mail advertising. Determine which formats or approaches have been successful and be sure to document the results. (You might also gather promotional samples from other professional organizations.)

### ***Working with Printers and Mailing Houses***

Unless the chapter reproduces meeting notices and other promotional materials, outside printers and mailing houses are used. To make those efforts more effective, economical and productive, here are some tips when working with printers and mailing houses:

- Provide material in a neat and well-organized form.
- Keep the message and format as simple as possible.
- Use pertinent images in your mailing to dress up the appearance and add to the impact of the message.
- Ensure the printer or mailing house has an updated mailing list.
- Avoid rush jobs. Make sure the printer/ mailing house is allowed adequate time to do the job properly.
- Obtain quotes from the printer/ mailing house on all projects to avoid invoice surprises.
- Establish ground rules with the printer/ mailing house regarding the deadline, cost and quality you expect.
- Put yourself on the mailing list so you can monitor the mailing.
- Know that edits made at the printer-proof stage can be costly. Try to send the cleanest (and most accurate) files to the printer.

## **E-MARKETING**

E-marketing can attract more people to your chapter website, increase members for your chapter and enhance branding of your chapter and its services.

### ***Website***

If you already have a website, start with a simple web promotion plan. If you don't have one but plan to build one, start with a simple and effective web design and development plan. Email [chapters@alanet.org](mailto:chapters@alanet.org) for prior approval of new website.

Search engine results can be greatly improved by including relevant industry content on the homepage and within the website and by encouraging partners to link to the website.

### ***Social Networking***

Social media is a great way to get in front of audiences who are discussing topics related to your chapter, expertise, product or service. Which platform should you use? Choose one or two where most of your audience is engaging. The top four that our members report using are LinkedIn, Facebook, Twitter and Instagram. If you'd rather participate in the international ALA groups, we welcome you, your chapter members and prospects. Here are the main links for those groups:

- [LinkedIn company page](#)
- [Facebook](#)
- Twitter: [@ALABuzz](#)
- Instagram: [@ALA\\_buzz](#)

### ***Email Marketing***

Email marketing is a form of direct marketing that uses email as its communication channel. Direct marketing is an umbrella term used to describe all marketing forms that go straight to the end user, thus not passing through the traditional mass communications channels, like a magazine or newspaper. As a tactic, email marketing is very flexible and can be used for a wide range of purposes. You could use it

to drive more traffic to your website, promote events, build a relationship with your existing members, promote new services and more.

The field of e-marketing is constantly evolving, so here are some sources we follow to stay informed about the latest trends and technology:

- [Social Media Examiner](#)
- [Content Marketing Institute](#)
- [Duct Tape Marketing](#)
- [MarketingSherpa](#)

Email communications should be succinct, with an interesting subject line as well as key information and the most important link near the top of the message. Sales words such as “free” or “deal” should be avoided so that they do not trigger spam filters. Also, avoid any exclamation points in subject lines as that may trigger spam filters, too. Many tools exist, such as Constant Contact and MailChimp, to assist in designing and deploying email marketing and to provide information about how many people open and click on each email. This can be used to test email marketing and determine what has been successful and is more likely to succeed in the future.

## MAILING LISTS

ALA headquarters can compile member mailing lists in Excel format for recruitment campaigns, for joint efforts with a nearby chapter or for independent members (those not affiliated with a chapter) who live/work nearby. Chapter requests should be directed to [membership@alanet.org](mailto:membership@alanet.org). While most requests can be processed within a few days, please allow 7 to 10 business days for processing. (Requests from business partners for membership lists should be directed to [advertising@alanet.org](mailto:advertising@alanet.org).)

Note: Headquarters cannot fill requests for lists for chapter newsletters or routine chapter mailings.

## FINANCIAL RESPONSIBILITIES OF CHAPTER LEADERS

Chapter leaders are responsible for managing chapter funds. The following guidelines are recommended:

### ***Chapter Budgets***

- Establish an annual budget of anticipated revenues, expenses and net profit or loss.
- Review actual expenses against the budget on a quarterly basis.
- Separate budgets should be prepared (and reviewed by the chapter's Board of Directors) for activities that occur during the course of the year such as seminars and surveys.
- Include travel funds for the Chapter President and/or other officers to attend the Annual Conference & Expo, leadership events and/or training sessions.

### ***Financial Transactions***

The guidelines below are based on the principle that the person receiving or disbursing funds should not be the same person actually making deposits, issuing checks or reconciling bank statements. Controls will vary depending on the size and activities of the chapter.



### ***Cash Receipts***

The person responsible for the particular income should receive the money coming into the chapter. For example:

- Dues are collected by the Membership Chair.
- Luncheon fees are collected by a person(s) designated by the Chapter President.
- Seminar fees are collected by the seminar planning committee member(s).

The person receiving the funds should prepare a list for the Treasurer with the payments to be deposited. A copy might also go to the Chapter President.

### ***Cash Disbursements***

Invoices approved by authorized persons should go to the Treasurer for payment. The Treasurer should attach a copy of the invoice to the check as backup information.

### ***Banking Resolution/Signature Cards***

Chapters should have a banking resolution that authorizes officer positions as signatories. Authorized signatories usually include the President, President-Elect and Treasurer. Signature cards should be updated annually or changed as needed. The following are recommended guidelines:

- One signature of the President or President-Elect is required for amounts up to \$500.
- Any two signatures of the above listed officers are required for amounts over \$500.

### ***Bank Statements and Canceled Checks***

For financial security, a good practice is to have bank statements and canceled checks sent to an officer other than the Treasurer for initial review and auditing.

### ***Bank Reconciliation***

The chapter's Treasurer might normally handle reconciliation; however, to secure crime insurance (formerly known as fidelity bond insurance) coverage through ALA's carrier, bank statements must be reconciled by someone not authorized to deposit or withdraw monies.

### ***Investments***

Cash-flow projections should be used to identify all cash requirements and project opportunities. The chapter's investments should earn the maximum rate of return, based upon current market conditions. The Treasurer usually handles investments, at the direction of the chapter Board.

### ***Treasurer's Report***

A monthly report detailing each item of income and expense should be distributed to all chapter Board members. Summaries are acceptable for chapter meeting reports.

### ***Investment Policy***

The investment of funds is a major responsibility. These responsibilities have become more difficult and complex due to the deregulation of the banking industry and the emergence of new investment vehicles. The purpose of an investment policy is to indicate a conscious, formal effort by chapter officers to develop, implement and monitor the investment of all funds.

The overall direction of a chapter's investment program may be found in the following objectives, which have been prioritized and explained to clearly identify expected results.

- Safety of principal is considered of greatest priority. Each investment that is made shall seek to ensure that capital losses are avoided, whether they are from securities defaults or erosion of market values.
- Liquidity is considered the next important priority. The investment portfolio should remain sufficiently liquid to enable a chapter to meet all operating requirements that may be reasonably anticipated. Where long-term, safe investments can be made, no more than 50% of the total portfolio will be allowed for this type of purchase. Long-term is defined as 120 days or more.
- Maximum rate of return: A chapter's investment portfolio shall be designed with the purpose of regularly exceeding the average return of three-month U.S. Treasury Bills. The investment program shall seek to augment returns above this threshold, consistent with risk limitations identified herein and prudent investment principles.
- Diversification: To further guarantee asset safety, chapter officers shall diversify investments to avoid incurring unreasonable risks from the practice of concentrating investments in specific security types, industry types, fund types, etc.
- Member confidence in the investment program is imperative. Chapters should avoid any transaction that might impair its members' confidence. Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs. Emphasis is placed on the probable safety of capital rather than the probable income to be derived.
- Responsibility for the investment program is delegated to the Treasurer. The Treasurer shall seek investment guidance from the chapter's Executive Committee and Board. The Treasurer shall direct investment program operations consistent with this policy.

### ***Independent Audit***

Chapters are encouraged to conduct a periodic independent audit or review. The chapter can designate either internal or external auditors to perform the audit. To save the cost of an independent auditor, chapter Board members can perform internal audits. A [sample audit form](#) is available in the Resources section of the Chapter Leaders Online Community.

### ***Seed Money for New Chapters***

ALA gives new chapters seed money that may be used to get chapter activities and educational programs underway. To receive the money, a chapter bank account must be established. Some banks require a taxpayer ID number before opening an account. Chapters must secure their own tax ID, which can be obtained directly from the IRS. You should contact your local IRS office or visit the [IRS website](#) to download the most current version of this form.

### ***Additional Sources of Chapter Revenue***

Depending on the number of members and program activities, each chapter must determine the amount of revenue necessary to meet its annual expense commitment. Some smaller chapters operate on total budgets of less than \$500; others establish budgets involving thousands of dollars. The addition of chapter dues provides a strong operating basis for the local chapter. Each chapter is urged to investigate ways to raise operating funds. With the availability of adequate local funding, chapters can send officers to conferences and training sessions such as ALA's Chapter Leadership Institute (CLI).

If the chapter elects to charge dues, it must determine the amount and frequency of payment (per meeting, quarter, year). In some cases, the dues are used to defray the cost of monthly luncheons or dinners as well as other chapter expenses. In some chapters, members pay the cost of meals separately.

Other revenue-producing activities may include:

- Seminars
- Special programs
- Co-sponsorship of educational programs
- Advertising in chapter newsletter
- Business partner seminars/exhibits
- Surveys

## **CHAPTER BENEFITS PROGRAM POLICY**

Chapters should review the [Benefits Program Policy](#) and obtain written approval from ALA headquarters before entering into an agreement with a business partner. Chapters can secure approval when the proposed agreement for a member benefit program that complements and is not in competition with existing or proposed contracts of the Association. Current chapter benefit programs may be renewed with prior written approval from headquarters. Chapter leaders should refer business partners who are interested in establishing nationwide and/or international benefit programs to ALA headquarters.

## **ENDORSEMENTS**

Neither the Association nor a chapter will endorse any business partner, products or services unless the Board of Directors of the international Association has granted prior approval.

## **JOB BANKS — LEGAL OPINION**

ALA's legal counsel has reaffirmed the opinion titled "[Guide for Operation of Placement Services by Chapters of Association of Legal Administrators](#)." The opinion states:

"Although the operation of a placement service by a trade association to assist its members to find new employment is an activity related to the association's tax-exempt activities, this activity must be carefully monitored. Potential problems are:

- Adverse tax consequences that may result from engaging in this type of activity
- Regulatory control at the state level.

"Tax-exemption. Trade associations are generally exempt from the federal income tax and most state income taxes. This exemption, however, is limited to income earned by the trade association as the result of the conduct of its tax-exempt activities. A trade association is tax-exempt with respect to activities for the common interest of its members, but not to regular business activities of a kind ordinarily carried on for profit. Exempt activities must be directed to the improvement of business conditions of one or more lines of business, as distinguished from the performance of particular services for individual members.

“ALA’s activities, upon which its tax-exemption is based, are those designed to further the members’ abilities as legal administrators and to otherwise serve as a forum for the discussion of problems and developments in the industry. The operation of an employment placement service is more like the operation of a business, which is ordinarily carried on for profit. Treasury Department regulations note that an organization whose purpose is to engage in a regular business of the kind ordinarily carried on for profit is not a business exempt from tax even though the business is conducted on a cooperative basis or produces only sufficient income to be self-sustaining. Therefore, critical considerations are to ensure these activities are of only minor significance in relation to the other activities of this Association and to eliminate any profit that would otherwise be recognized from the operation of such activity.

“State Regulations. Many states have regulations related to the operation of employment agencies. If the placement activities of ALA or its chapters become a significant part of its activities, it is more likely that ALA would be subject to state regulation. Avoiding such regulation is the second reason for minimizing and carefully controlling and monitoring any placement activities.

“Guidelines. To minimize the possibility of either losing tax-exempt status or becoming subject to state regulation, the following guidelines should be followed:

- “Placement activities of the chapters should be held to a minimum. The chapters should act merely as clearing houses for résumés of administrators seeking positions.
- “Placement services should be limited to the placement of legal administrators; clerical employees should not be covered by the program.
- “No opinions should be expressed by any chapter officers, employees or members as to the qualifications of any member seeking a position. The program should simply bring together administrators seeking positions and prospective employers.
- “Particular care should be taken to avoid any discrimination with regard to placement activities. Résumés of all qualified administrators should be forwarded to inquiring employers regardless of any discriminatory restrictions imposed by those employers.
- “The placement activities should not be operated for a profit. A small charge, such as \$100, might be made to cover administrative cost.
- “Advertising of the placement service should be held to a minimum. Any advertisement should be limited to a short, concise statement indicating that the chapter provides placement services to its membership and that employers may contact the chapter to obtain résumés of administrators seeking new positions.

“These guidelines concern only the most basic restrictions to assure that ALA and its chapters’ tax-exempt status are not jeopardized or that they become subject to state regulation. Each chapter, within the boundaries of these guidelines, must establish and be responsible for operating rules and procedures for any placement service they wish to initiate.”

(November 7, 1978; reaffirmed August 19, 1992)

## **LICENSE AGREEMENT**

Chapters wishing to use the ALA logo on items other than letterhead or envelopes (such as clothing,

jewelry, plaques, pen sets, coffee mugs, etc.) may be required to enter into a [License Agreement](#) with ALA, the owner of the logo. Chapters should contact [marketing@alanet.org](mailto:marketing@alanet.org) before ordering these items to determine if a written agreement is required. Whenever possible, verbal approval may be given.

**NOTE:** ALA has two different License Agreements — one for chapter websites and one for other products.

## MUSIC LICENSING

A copyright law exists that requires that permission from a licensing agency be obtained for any music played at a conference or meeting. This applies to all music, whether taped or mechanical (radio, CDs, streaming services, video background music, etc.). It is the responsibility of each chapter to comply with the law when music will be played at any activity. The two major licensing agencies have begun to actively enforce this law, and they are filing lawsuits as a part of this enforcement.

ALA international is licensed with BMI ([Broadcast Music, Inc.](#)) and ASCAP ([American Society of Composers, Authors and Publishers](#)). However, each chapter is legally required to be licensed as well. The cost is minimal. To obtain the appropriate licenses, click on the above links provided.

Chapters should inform their business partners of this requirement, if music is to be used as part of their booth, as the onus is on the business partners to be in compliance separately.

## THE VALUE OF A BUSINESS PARTNER RELATIONS PROGRAM

By including positive business partner relations as a chapter goal, the chapter recognizes the importance of business partner relationships to the individual, the chapter and the Association.

One goal of a business partner relations program is to develop a positive member approach to business partners and activities involving business partners. Another goal is to market the benefits of connecting with ALA members to the business partner community. ALA provides an important service to business partners by organizing opportunities for contact and exposure. In turn, business partners may supply much-needed support to chapter programs as well as the overall goals of the Association.

### ***Educating Business Partners***

There are many ways the chapter can educate business partners to assist them in making the most of their investment in ALA. Good education will improve the business partners' understanding of ALA and its members, increase their confidence in selling to our audience, strengthen their commitment to ALA and ultimately cement their decision to continue to support the chapter and ALA as a whole.

Education, however, is a two-way street. Ideas for educating chapter members about building solid relationships with the business partner community are available.

First, educate the business partners about the legal management profession and about ALA as a whole.

<a href="#">ALA Benefits</a>	Share general information about the Association and the programs, products and services available to members.
<a href="#">ALA's Vision</a>	Sharing this information helps to guide development of programs, products and services. It also allows business partners the opportunity to gain a better understanding of Association objectives.

<a href="#"><u>Organizational Structure</u></a>	A listing of ALA chapter websites is available.
<a href="#"><u>Business Partner Center</u></a>	Become familiar with the many opportunities in the Business Partner Center. This is a valuable resource for business partners who want to reach beyond the chapter level of participation.
<a href="#"><u>Business Partner Portal</u></a>	Connect your business to ALA members representing the AmLaw 200, corporate counsel and government legal departments. Tailor your marketing message to decision-makers representing operations, administration, IT, HR, marketing and finance.

Next, educate business partners about the decision-making process in a law firm.

In most law offices, purchasing decisions are made by a group or committee, not just one individual. Because of this, the decision-making process can be lengthy as the group comes to consensus. The responsibilities of administrators require acting as liaisons between firm or law department management and the business partner. Legal management professionals are vested in expediting a well-considered decision to further the firm's goals. Advise business partners to be patient with this process and share some or all the following points:

- Legal management professionals do rely on information from business partners. Whether a quick email message or a full-blown presentation, they appreciate the information.
- Business partners are best represented when they provide complete and accurate information about products or services. It is critical to be able to rely on the information that is received.
- Sell not only the product, but the service. It is important to share the confidence that once the agreement is signed and the product delivered that there is adequate follow-through and support. This is true for equipment, supplies, software, etc.

Then, provide guidance about building relationships with the legal management professionals:

- Business partners should learn about the firm or legal department. Visit its website. Is it a large firm? Does it have multiple offices? Is it plaintiff work, general, corporate work, etc.? It is impressive when business partners already know a little about the firm and don't expect the administrator to spend time talking about the "general information." This information will allow valuable time to be devoted to detail about the firm's perceived needs and how the product or service can address those needs.
- Make an appointment. Do not drop by with the hope or expectation that the administrator is available. If you stop by without an appointment, it's best to drop off a business card and information for the receptionist to forward to the appropriate person.
- Know your contact. Rather than approach non-decision-makers in a firm (staff and lawyers) about using services and products, seek out the professional manager in the firm who is responsible for the decisions regarding a particular product or service. Decisions regarding the selection of a business partner are centralized in law firms and legal departments for efficiency and cost effectiveness.

- Make a good first impression. For example, a 10-minute meeting is set up with a business partner to make introductions. If the business partner shows up with three other people to take a tag-team approach, the administrator may now need to find a conference room and it could be awkward — it was unexpected. It is quite clearly going to be longer than a 10-minute meeting. If a business partner feels it is important to have others involved, whether it is the initial meeting or subsequent meetings, make those needs known to the administrator prior to arrival.
- Relationships take time. Approach each contact, each meeting, each phone call, each negotiation and each proposal as a partnership. Strive to develop long-term relationships — don't look for the quick sale.
- Personal preferences: Ask legal management professionals what they would like the next step to be and respect those wishes. Maybe the product or service is really a “hot item” right now, or perhaps there are a couple other things more pressing for the next two to three months. Ask how often the legal management professionals would like a follow-up courtesy call to check on the status of a proposal or see if the firm is ready to look more seriously at a product/service. Confirm the preferred method of communication (phone, email, mail). There are so many efficient ways to keep in touch — find out which works best.
- Maintain contact. Continue communications with the legal management professional until asked to contact someone else within the firm. In other words, don't go over the initial contact's head, including calling the managing partner to inquire on the status.
- Talk about the trends in the legal industry. Legal management professionals look to business partners to educate them about industry trends.
- Service after the sale: Highlight service advantages and the accessibility to business partner personnel who can resolve issues should they come up. Legal management professionals like to know that they will be taken care of once the deal is done and that they are not just left to a toll-free service number and the infamous voicemail nightmares.
- Professional etiquette: Concentrate on highlighting virtues and strengths and offer examples of how other professional organizations have benefited a relationship with the business partner and the product or service. Do not speak poorly of your competitors.
- Thoroughness: Complete all items in the request for proposal (RFP). Incomplete responses create additional follow-up and waste time in the decision-making process.
- Provide recommendations. Offer references from other law firms. The legal community is large and vast, yet it is also very close and tight-knit. Legal management professionals are a business partner's very best references. Be assured that when top-quality products or services are provided or when a business partner or their company goes the extra mile, legal management professionals will all know about it — everyone benefits!
- The long-term connection: Maintaining a positive relationship after an unsuccessful negotiation is also vital to all parties' success. The legal management professional may change firms or may become disappointed with the original selection. If there was a positive post-negotiation relationship, the legal management professional could come to you in the future. And, if a positive relationship is maintained in spite of a lost bid, the legal management professional may still become a good referral when the business partner calls upon other legal management

professionals.

- Communicate, negotiate and build a long-lasting relationship!

### ***Connecting Business Partners with Members***

Legal industry business partners are great resources. They know the market, and they know their products or services and where their products or services can help. To reach new audiences, business partners often turn to professional associations. Many business partners continue to support associations long after their name recognition and market share goals are achieved. This good faith reinforces their place in the market.

The best way we can reward business partners for their support is to continually find ways to connect them to the ALA membership. Business partners value face time more than anything.

The Association benefits from these relationships in many ways. Business partner support offsets the expense of providing high-quality education and network opportunities within a chapter. No chapter is too small for a business partner program — even business partners with a national focus find value at the chapter level.

Here are examples of some successful business partner opportunities developed by ALA chapters that help keep members and business partners connected.

### ***Monthly Meeting Sponsorship***

Invite sponsors to underwrite monthly chapter meetings. Invite the business partners to arrive before the meeting begins to enable them to meet and greet attendees as they arrive. Allow sponsors a few minutes at the podium to tell the members about their company and product or service. Some chapters try to coordinate the sponsor with the topic of the meeting.

### ***Scholarship Fund***

Some chapters award scholarships by way of drawings at special events or general meetings. Business partners who donate to a scholarship fund are invited to attend events or meetings and draw the winner(s). This gives the business partner an opportunity to meet the recipient in person. Ensure the business partner receives adequate recognition from the attendees. Consider giving the recipient a prepared thank you letter to send to the business partner. Thanking business partners is an important component to the success of such sponsorships.

### ***Resource Directory/Survey/Business Partner Directory***

The Resource Directory is a tool that some chapters publish. This directory surveys what services and products are being used within chapter members' firms. Advertisements in the directory can be sold to offset the cost of production. Advertisers supplying paid advertisements should be provided with a free copy of the directory. This directory can give business partners details about their competition and can elicit additional marketing ideas.

### ***Membership Directory***

Some chapters utilize business partners to pay for all or a portion of their Membership Pictorial Directory. Printers may donate their services to produce a print directory, or website developers may assist in the production of an online directory. Contributing business partners are recognized in, and given access to, the directory. The member information distributed to business partners may vary depending on the comfort level of the chapter and its members, and specific permissions provided by members. For example, business partners may receive a directory without direct-dial numbers but with names, addresses and main telephone numbers. Alternatively, business partners could be given a set



of mailing labels of all chapter members for use in sending a direct-mail piece. Associations are responsible for protecting members' personal data both within their control and when shared with third parties, and an individual member opt-in approach is best when it comes to data privacy. Laws vary by state and ALA recommends due diligence to familiarize yourself with state and federal data privacy laws.

### ***Business Partner Appreciation Event***

Some chapters create events to recognize those business partners who have generously supported their chapter. Appreciation events are always popular. Consider holding a recognition party for the chapter's top contributors. Seek hotel or restaurant support to offset some or all the cost. Present recognition certificates to business partners during this event. Business partners are competitive and will try to be one of the "chosen" for this event.

### ***Business Partner-Sponsored Education Program***

Select one or two major sponsors for a half-day seminar or other special education session, such as a managing partners breakfast, lunch or dinner, or a managing partner panel. Offer the business partners an opportunity to display their products before or after the formal part of the program and include these sponsors in the lunch or cocktail hour. Invite them to have one representative at each table or to introduce the speaker.

### ***Newsletters***

Many chapters offset print or digital newsletter production and distribution costs by selling advertisements. The advertisers receive a copy of the newsletter/e-newsletter, which helps them keep current on chapter activities and hot topics. Be sure to review all advertisements carefully to ensure compliance to ALA's brand and their relationship to the chapter. Business partners should not refer to themselves as "members" nor should they suggest endorsement by ALA. Consider inviting specific business partners to contribute relevant and timely articles to the newsletter — they often have a wealth of knowledge to share.

### ***Social Event***

Business partners are always looking for an opportunity to network with chapter members. Social events lend themselves to this kind of interaction. These events can include a new member party, a golf tournament, a holiday party, ALA's Community Connection event or some other type of social event.

### ***Website***

More than 80% of ALA's chapters have websites. There have been a number of different approaches to business partner participation and/or recognition on these sites. Some chapters sell links to the business partner's webpage and others sell tombstone ads on the website itself, bundling a link with one of the other opportunities listed above.

### ***Joint Seminar with Bar Association***

Consider organizing a one-day law office management seminar and exposition with a local bar association. Invite various business partners to set up a business partner exposition hall to showcase their products and services. Recruit business partners to give presentations at learning pavilions in the exhibit hall. This has an added benefit of raising the ALA's visibility with the local bar association.

### ***Business Partner Educational Session/Forum***

Work with your business partners to help them understand the legal industry and how best to sell to chapter members. Consider a program with a panel of legal management professionals or table talks to discuss relevant issues business partners need to understand regarding the decision-making process in a law firm. Following the program, consider hosting a cocktail party so that business partners and

legal management professionals can network.

## **BUILD BETTER BUSINESS PARTNER RELATIONSHIPS**

### ***Personal Interaction***

- Keep it personal! When you attend a fall conference, specialty event or the Annual Conference & Expo, remember that you are attending as a representative of your firm. This is not the time to do “chapter business.” The business partners have invested a great deal of time and resources to meet you — the legal management professional — and help you find the right product or service for your firm.
- Appreciate. Always visit our business partners in the Exhibit Hall at the various ALA events. Be sure to thank them for their loyalty to ALA and for their part in providing such a quality event or program.
- Make a good first impression. Set a short meeting with a business partner if you can. Even if you do not think you need the service or product now, it is important to give business partners the time (on your schedule) to learn more for future reference.
- Communicate effectively. Set a timeframe for you to return business partner calls and emails (e.g., within 72 hours) and let the business partner know that you will get back to them. Do whatever works best for you and do your very best to stick to it! Approach each contact, each meeting, each phone call, each negotiation and each proposal as a partnership. Strive to develop long-term relationships.
- Visit their websites. Learn all you can about your business partners. This information will allow you to use your valuable time to talk in detail about their products or services.
- Provide guidance. If you are not the decision-maker at the firm, let the business partner know that up front and advise who at the firm is responsible for the decisions regarding the product or service.
- Communicate honestly. Make sure the business partners understand what your next step might be. If there is no next step, they will respect that. Let them know that you will keep their information for future reference. Please confirm the preferred method of communication (phone, email, mail) if there is to be any follow-up. There are so many efficient ways to keep in touch — let them know what works best for you.
- Establish relationships. Maintain a positive post-negotiation relationship. A business partner can be a vital ally for you and your firm or for a colleague looking for a new product or service — make that connection!

### ***Chapter Interaction***

Always remember our business partners are a key reason all levels of the Association are able to hold quality educational programs and events at a reasonable cost to our members.

Clearly identify someone in your chapter to communicate with the business partners. Follow all the communication guidelines specified above.

Make sure the business partners understand what your next step might be. If there is no next step, they will respect that. Let them know that you will keep their information for future reference. Please confirm the preferred method of communication (phone, email, mail) if there is to be any follow-up. There are so many efficient ways to keep in touch — let them know what works best for you.

Share with the business partners. Business partners spend a lot of time determining the return on investment (ROI) they get from ALA. By providing them with event promotional materials, maximum recognition for their participation, permission-based membership rosters (include photos!), chapter turnover information and opportunities to participate in activities that don't necessarily come with a price tag, your chapter will continue to flourish.

It is all about education. If you know of a business partner who is a quality speaker, consider using or recommending them to provide education at the chapter level. If the individual is top-notch, please be sure to share the wealth with the Professional Development Department staff at ALA headquarters.

Be consistent. Keep the rules of engagement the same for everyone. As we continually say at ALA headquarters, "Out of fairness to the others who have also made this commitment ..." It's all about mutual respect.

Drive home a message to chapter members about the value the business partners have to ALA as a whole. Educate members about how cost-prohibitive their Association membership dues and event registrations would be without our partners in business.

### **BUSINESS PARTNER RELATIONS LISTSERV**

Chapter leaders are invited to join the [ALA Business Partner Relations listserv](#) to share best practices. It is important to note that unlike any other ALA listserv, the business partners currently serving on [Business Partner Relations Project Team](#) also participate with this group. They have been an incredible resource and sounding board for ALA and its chapter volunteers.

### **ALA HEADQUARTERS ASSISTANCE**

Get to know [ALA's Business Partner Relations Project Team](#). They can be a valuable asset to your chapter.

Other resources you can find on the ALA website for chapter use or to share with business partners:

<a href="#">Business Partner Center</a>	A complete guide to all of ALA's marketing vehicles.
<a href="#">Business Partner Portal</a>	A complete site that details all sponsorship, advertising, writing and VIP resources for business partners.
<a href="#">Calendar of Events</a>	A list of upcoming ALA events, including dates and locations.
<a href="#">Chapter Websites</a>	Business partners often want information about ALA chapters in a different location. Refer them to ALA's website for links to chapter websites. Note: Not every ALA chapter has a website.  Find easy to use links to ALA content that can be used on your website in the " <a href="#">Unpack ALA</a> " resource center.
<a href="#">Diversity, Equity, Inclusion and</a>	Chapter leaders and business partners with an interest in embracing diversity, equity, inclusion and accessibility in the legal workplace will find

<a href="#">Accessibility</a>	resources via ALA's website.
<a href="#">Logo Use Agreement</a> (Members Only)	If you share your chapter's logo with business partners, it is important to protect this intellectual property. Consider the logo use agreement in these situations.
<a href="#">Chapter Tools</a> (Members Only)	Find a wealth of information including templates and links that will assist with your business partner program endeavors.
<a href="#">Headquarters Staff</a> <a href="#">Contacts</a>	A complete listing of ALA's professional staff is available on ALA's website.