



ASSOCIATION OF LEGAL ADMINISTRATORS
Committee Plan of Work 2020
Submitted: November 2019

ALA MISSION:

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

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

ALA's STRATEGIC GOALS 2017-2020:

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

COMMITTEE NAME: Certification Committee

COMMITTEE CHAIR: DeAnna Ouderkirk, CLM, MBA, SCP

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

ALA BOARD LIAISON: Brian Gilman, CLM

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

COMMITTEE SIZE: 8 (One member stepped down in 2019 we have 3 rolling off in 2020)

COMMITTEE TERM: 4 years, non-renewable (We would like to request this be changed to 3 years with an option to renew for 1 additional year.

COMMITTEE PURPOSE:

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

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

ROLE:

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

COMMITTEE MEMBER ELIGIBILITY AND SELECTION PROCESS:

Committee members must be a Certified Legal Manager and must have completed at least one recertification cycle. Although expertise in one or more functional areas is not critical for every member, it is important to maintain a balance of knowledge among committee members. Interested individuals complete an application form, which includes references, areas of expertise, and a writing sample. Committee members are interviewed and carefully considered based on educational background, experience level, size of firm, areas of expertise, and writing skill. (Since we have 4 committee members to replace in 2020, we would like the board to consider changing the term to a 3 year term with a one year extension if desired. The committee feels the 4 year term is a deterrent for people to volunteer.)

COMMITTEE CONFIDENTIALITY:

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

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

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

Because of their unique knowledge of the contents of the CLM examination, committee members sign a confidentiality agreement every year and are not permitted to be involved in study activities and development

of study products (e.g., commercial study guides). This moratorium continues for at least 3 years after a member rotates off the committee.

COMMITTEE MEMBER EXPECTATIONS / MEETINGS:

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

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

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

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

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

STRATEGIES TO ACHIEVE ALA GOALS:

Goal 1 - Provide high quality customer service and resources to all CLM's and those seeking credentials

- Identify and commit to customer service standards and metrics
- Consistent documentation all program policies and procedures
- Establish and maintain an accurate database of all CLMs

Goal 2 - Maintain fair and defensible certification program with assessments and standards to ensure the validity of the program

- Evaluate the soundness of the certification requirements and exam
- Ensure the exam reflects current knowledge and professional practices
- Strive to make the program financially self-sustaining

Goal 3 - Support continuous professional development and increase CLM participation

- Develop a 2-year Path to Certification Task Force
- Expand relevant professional development opportunities by fostering relationships with continuing education providers (Approved Provider program)
- Create a self-assessment process for CLM Candidates
- Provide an online repository for tracking certification credits
- Establish a defined Path to Certification - ALA education aligned with path to certification
- Develop badging/micro-credentialing for courses
- Develop a Legal Industry and Operations Management e-learning courses and Leadership required course
- Ensure regular review and update of CLM Study Guide
- Provide study group support for Chapters
- Encourage chapter support for CLM candidates
- Provide value adds for successful CLM candidates

Goal 4 - Visibility & recognition of CLM designation

- Develop marketing plan
- Maintain consistent brand image
- Form alliances with related organizations to help promote the program
- Seek clear support from ALA Board & HQ
- Marketing effort from chapters, coordinated by National
- Ensure consistent and prominent recognition of CLM status at all ALA events
- Publicize credibility-enhancing events (e.g., endorsements)
- Recruiting campaign for volunteers for the committee

COMMITTEE DELIVERABLES:

The Certification Committee produces about 100 new test questions each year for the Certification Exam. Members of the Certification Committee present at local chapters and annual conferences to support the members that wish to take the CLM exam. The Certification Committee is integral in developing, reviewing and revising Certification materials and resources as needed. The Certification Committee has been integral in further developing the Path to Certification and a strategic plan to implement the path, including recommendations and developments of new educational offerings that further support all members, not just those seeking the CLM exam. The Certification Committee is also involved in the Approved Provider

Program, the Study Guide development and updates, the Practice Analysis and the assistance to Chapters and members in developing Study Groups and understanding the program.

RESOURCES:

The Certification Committee would like to request the development of a 2-year Path to Certification Task Force in which a group of volunteers that would include 6 to 8 members that are past Certification Committee Members, current Certification Committee Members and current Professional Development Committee Members. This task force would work closely with the Certification Committee Members, the Professional Development Committee, ALA Headquarters Staff and the Board to meet each of the above outline goals. The Certification Committee already spends a lot of time concentrating on developing test items and feels that it is imperative to the success of the Path to Certification initiatives that we have this extra team working to get these initiative off and running. Once these core materials are developed, we are confident the Certification and Professional Development Committees will be able to help keep them current.

The CLM exam is gaining popularity, we have 75 attendees in the current Chicago Chapter Study group alone. In order to maintain the credibility and integrity of the program and to provide the added benefit to all ALA members of the Path to Certification; we feel we have to provide a first class program with first class service. We can only do that if efforts are concentrated on the program.

In addition, we must have a database or program to have reliable and consistent data. We ask that we either have the IMIS certification module or some reliable system purchased and made available at the earliest possible time. The management and access of this information is extremely important to the professionalism, and integrity of our program.

The Certification Committee appreciates and regularly depends heavily on its staff liaison, Patricia Carrera and HumRRO representative, Tiffany Day, to conduct its business. We utilize the Zoom meeting often and regularly. We depend on the one in person meeting at Annual Conference in which each Committee Member receives one nights hotel stay to attend.

