



## **PRESIDENTS' AWARD OF EXCELLENCE** **"Roadmap to Success"**

***Recognizing chapter activities from January 1, 2017-February 28, 2018***

***The Presidents' Award of Excellence, named in honor of ALA Past Presidents, recognizes chapters for their efforts in effective chapter leadership and establishes both mandatory and recommended annual chapter performance standards.***

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.

The Presidents' Award of Excellence is a chapter performance guideline 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.

A member of the Regional Leadership Team (usually the focus chapter liaison) will meet with the incoming or new Chapter President (and potentially other chapter leaders) to review these performance objectives and to help the chapter set goals for the year. This will be accomplished either in person or over the phone. Throughout the year, the Regional Leadership Team and ALA's professional staff are available to assist chapters in achieving these objectives.

It is hoped that ALA chapters will meet and exceed these performance objectives. As an incentive to recognize chapter success and continued innovative growth, we ask each chapter to strive to achieve the Presidents' Award of Excellence. The guidelines that follow include items that are mandatory, while others are recommended.

Use the following checklist to chart your progress and highlight your chapter successes! Initiatives should be completed within a 14-month period prior to the Award submission date. Members of your Regional Leadership Team and ALA Headquarters Staff are available to help at any time.

**RESPONSIBILITIES TO CHAPTER MEMBERS**

√	Required or Recommended	Description	Individual Responsible
<input checked="" type="checkbox"/>	Required	Provide chapter members with a calendar of major chapter and Association events. This can be achieved by sending a regular newsletter or email blast or by publishing dates on chapter website.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Create educational programs in <b>at least three</b> of the five educational areas of knowledge as identified by the ALA Knowledge, Skills and Abilities (KSA) Survey. These include: (1) Communication and Organizational Management, (2) Financial Management, (3) Human Resources Management, (4) Legal Industry/Business Management, and (5) Operations Management.	Arun Mistry
<input checked="" type="checkbox"/>	Required	Create awareness among members and the legal community at large of <a href="#">ALA's Mission Statement</a> , <a href="#">Code of Professional Responsibility</a> , and <a href="#">strategic plan</a> . Develop and maintain communication methods to announce and promote all levels of ALA activities and events. Such methods may include announcements at chapter meetings, newsletters, websites, event calendars and/or other communications provided to members on a regular basis. See <a href="#">ALA's Publicity Kit</a> for ready to use ads.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Take specific action to advance and support diversity and inclusion in the Association, in the legal management community and in all legal service organizations through educational opportunities, activities, and initiatives.	Frances Dujon-Reynolds
<input checked="" type="checkbox"/>	Highly recommended	Enhance the visibility of members, the legal management profession, and ALA through activities such as community service projects and/or alliances with bar associations and other law-related professional associations. Participate in <a href="#">ALA's Community Connection initiative</a> .	Jennifer Miller
<input checked="" type="checkbox"/>	Highly recommended	The chapter makes full use of <a href="#">ALA's Diversity &amp; Inclusion Scorecard – A Roadmap to Change for Chapter Leaders</a> and encourages chapter members to utilize the <a href="#">Scorecard for Law Office Administrators</a> .	Frances Dujon-Reynolds
<input checked="" type="checkbox"/>	Highly recommended	Reinforce ALA's position as the thought-leader within the legal management industry by promoting readership of <a href="#">Legal Management digital magazine</a> , including monthly distribution of current articles or relevant features.	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Regularly recognize achievements and/or contributions by members, volunteers, business partners and the like. Such recognition could be made part of the chapter's website or newsletter, a chapter meeting or social media postings.	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Actively promote and educate members about <a href="#">ALA's Certified Legal Management (CLM)<sup>SM</sup> program</a> . This could be achieved by recognizing CLMs at chapter events, advertising the benefits of the program with the local bar association and/or including a CLM focused presentation as part of the chapter's annual educational programming.	Tara Binge
<input checked="" type="checkbox"/>	Highly recommended	Maintain the chapter's website with current news and upcoming events. If the chapter does not currently have a website, create a plan to launch one.	Melissa Schwab
<input checked="" type="checkbox"/>	Recommended	Promote and/or create awareness of the articles and resources available in <a href="#">ALA's Career Center</a> .	Sean Monahan
<input checked="" type="checkbox"/>	Recommended	Maintain the chapter's social media accounts with current news and upcoming events. If the chapter does not have a social media presence, create a plan to establish one.	Denny Krantz
<input type="checkbox"/>	Recommended	Develop a written plan with measurable goals and objectives to increase attendance at meetings and events.	
<input checked="" type="checkbox"/>	Recommended	Educate members on the importance of sustainability ("green initiatives"). This could be achieved by hosting an educational session, publishing an article in the chapter's newsletter, or posting information on the chapter's website.	Arun Mistry
<input type="checkbox"/>	Recommended	Reinforce ALA's position as the thought-leader within the legal management industry by making presentations on law firm management at law schools and/or bar associations or by authoring original articles for inclusion in the publications of law schools and/or bar associations.	

Responsibilities to Chapter Members:   4   Required (4)   6   Highly Recommended (6)   3   Recommended (5)

**RESPONSIBILITIES TO CHAPTER MANAGEMENT**

√	Required or Recommended	Description	Individual Responsible
<input checked="" type="checkbox"/>	Required	Meet with your assigned Regional Leadership Team focus chapter liaison (or someone else from ALA leadership) to go over the Presidents' Award of Excellence checklist. These meetings are encouraged as part of a chapter visit or other in person meeting, such as at Chapter Leadership Institute or ALA's Annual Conference; however, they can be done by phone.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Adhere to and abide by the chapter's own bylaws. In addition, the chapter shall seek and obtain approval by ALA headquarters of proposed amendments to chapter bylaws prior to any vote by members on proposed amendments.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Create a workable structure to maximize chapter efficiency by taking into consideration leadership succession, chapter strategic planning, and the interests and expertise of members. Install officers annually (April preferred) to facilitate effective leadership training opportunities offered by ALA.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Ensure the chapter is incorporated. Obtain tax exempt status and annually file tax returns, where appropriate and as indicated by pertinent regulatory bodies. Maintain procedures for ensuring that annual filings and renewals are made with appropriate agencies. (International chapters should take comparable measures in accordance with local requirements.)	Christopher George
<input checked="" type="checkbox"/>	Required	Protect personal assets of members by taking appropriate safeguards, which may include securing and maintaining insurance coverage, fiduciary bonds and chapter incorporation.	Christopher George
<input checked="" type="checkbox"/>	Required	Ensure that the chapter's treasury is not commingled with employer or personal funds and that the chapter maintains appropriate internal controls to ensure financial security. Maintain procedures for annual audit or detailed review of books, accounts and records by chapter officers (other than by the chapter treasurer or other officer with primary financial responsibilities) and/or by outside, independent auditors.	Christopher George
<input checked="" type="checkbox"/>	Required	Create and maintain awareness of antitrust/competition issues, such as those published in <a href="#">ALA's Antitrust Guide</a> .	Sean Monahan
<input checked="" type="checkbox"/>	Required	Promote participation in ALA's Compensation and Benefits Survey. Or, if the chapter produces its own survey, obtain approval by ALA headquarters prior to dissemination of any compensation/economic survey questionnaires.	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Maintain a continuous retention and recruitment effort to create a diverse chapter membership from all cross-sections of the legal management community, with the following goals in mind: a. retention rate goal exceeding 80% (industry average for individual associations). b. total membership equal to or greater than its membership total on December 31 of the previous year. Headquarters will develop and share the 2017 recruitment and retention chart in early January 2018.	Karen Turner
<input checked="" type="checkbox"/>	Highly recommended	On annual basis, survey members to determine what issues they are facing in their jobs and also their satisfaction with chapter benefits and activities.	Karen Turner
<input checked="" type="checkbox"/>	Highly recommended	On regular basis (at least annually), conduct a "benefits of membership" session for new and prospective members and invite existing members who may want a "refresher." Highlight benefits for all levels of the Association (chapter/region/international) and the value of our business partner relationships. This can be part of Regional Leadership Team chapter visit.	Karen Turner
<input checked="" type="checkbox"/>	Highly recommended	Create and/or maintain a mentor or "buddy" program for new members.	Karen Turner
<input checked="" type="checkbox"/>	Highly recommended	Maintain regular communication with the chapter's assigned Regional Leadership Team focus chapter liaison.	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Create measurable plans and opportunities to promote aspects of membership to appeal to current and prospective members across all generations, focused on developing long-term leadership and involvement.	Karen Turner
<input checked="" type="checkbox"/>	Recommended	Create and/or maintain a program to keep seasoned administrators, including Past Presidents, actively involved in chapter activities.	Lisa Sterritt
<input type="checkbox"/>	Recommended	Provide educational enrichment within the community through activities such as internship programs, advisory panels, curriculum development efforts or teaching.	
<input type="checkbox"/>	Recommended	Conduct a joint event or initiative with another professional organization (see ALA's listing of <a href="#">Strategic Alliance Partners</a> ). Submit <a href="#">Strategic Alliance Profile Form</a> .	
<input type="checkbox"/>	Recommended	Assist ALA headquarters with recruitment efforts by regularly providing them with names and contact information for prospective members.	
<input type="checkbox"/>	Recommended	Provide <a href="#">IDEA Award</a> information to chapter members and business partners. Encourage chapter, firm, group and/or individuals to apply.	

Responsibilities to Chapter Management: 8 Required (8) 6 Highly Recommended (6) 1 Recommended (5)

**RESPONSIBILITIES TO BUSINESS PARTNERS**

√	Required or Recommended	Description	Individual Responsible
<input checked="" type="checkbox"/>	Required	Develop and implement procedures and policies that facilitate business partner involvement in chapter-selected activities. Examples include: business partner appreciation events; public acknowledgement for financial or “in kind” support; business partners permitted to attend an entire meeting they sponsor; business partners encouraged to participate in special projects (e.g., Community Connections) or social events; business partners invited to serve on a business partner advisory panel.	Michelle Smith
<input checked="" type="checkbox"/>	Required	Actively promote and educate members of benefits delivered directly with ALA membership, specifically promoting two times a year the exclusive ALA member savings <a href="#">VIP Program</a> .	Sean Monahan
<input checked="" type="checkbox"/>	Required	Support the engagement and growth of the international membership by not scheduling any chapter conference, event, or expo thirty (30) days prior to or following a scheduled ALA International event, conference, or expo ( <i>NOTE: This policy was reinstated as a formal policy beginning 1/1/2017</i> ).	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Publish at least one article per year in the chapter newsletter or on the chapter website to educate members about the importance and value of business partners. The article should contain at least two testimonials — one from the member perspective and one from the business partner perspective — about the value or success in working together.	Michelle Smith
<input checked="" type="checkbox"/>	Highly recommended	Subscribe to and participate in <a href="#">ALA's Business Partner Listserv</a> .	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Encourage members to use the <a href="#">Legal Marketplace</a> program.	Sean Monahan
<input checked="" type="checkbox"/>	Recommended	Inform business partners about regional and ALA opportunities by providing them with a link to <a href="#">ALA's Business Partner Center</a> .	Michelle Smith
<input checked="" type="checkbox"/>	Recommended	On annual basis, submit an updated <a href="#">Chapter Business Partner Program profile</a> .	Michelle Smith
<input checked="" type="checkbox"/>	Recommended	Assist ALA headquarters with growing business partner relationships by regularly providing names and contact information for relevant business partner prospects. Send details to <a href="mailto:marketing@alanet.org">marketing@alanet.org</a> .	Michelle Smith

Responsibilities to Business Partners:   3   Required (3)   3   Highly Recommended (3)   3   Recommended (3)

**RESPONSIBILITIES TO THE ASSOCIATION**

√	Required or Recommended	Description	Individual Responsible
<input checked="" type="checkbox"/>	Required	Provide ALA headquarters with a <a href="#">list of individuals</a> who will assume chapter office as soon after election as practicable and before installation occurs. Provide ALA with current digital photo of Chapter President.	Sean Monahan
<input checked="" type="checkbox"/>	Required	The chapter president shall update and return the <a href="#">Chapter Profile Form</a> on an annual basis. Semiannually, chapters will review, reconcile and return chapter membership rosters to ALA headquarters.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Ensure that all chapter members are also members of ALA at all times. On an annual basis, the chapter president will submit a timely statement certifying compliance with this ALA bylaw provision.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Provide copies of board and chapter meeting minutes to chapter members.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Use the ALA logo and other Association symbols pursuant to the <a href="#">Brand Identity Guidelines</a> provided by ALA headquarters.	Sean Monahan
<input checked="" type="checkbox"/>	Required	For those chapters that maintain a chapter website, ensure a link to <a href="http://www.alanet.org">www.alanet.org</a> is included on the home page of the chapter site.	Sean Monahan
<input checked="" type="checkbox"/>	Required	Ensure all chapter board members are subscribed to and participate in <a href="#">ALA's Chapter Leaders Community</a> .	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Ensure that one or more chapter board members (or other designated individual/s) attend the Chapter Leadership Institute annually. The President-Elect is encouraged to attend. Limited financial assistance is available for those chapters that demonstrate need.	Tara Binge
<input checked="" type="checkbox"/>	Highly recommended	Actively promote and educate members about <a href="#">ALA's Annual Conference, Regional Legal Management Conferences, and specialized conferences</a> and other educational opportunities, such as <a href="#">webinars</a> .	Arun Mistry
<input checked="" type="checkbox"/>	Highly recommended	Ensure that a Regional Council Representative (or other designated individual/s) attends Regional Council Meetings held in conjunction with ALA's Annual Conference and Regional Conference. The Regional Council Representative (or other designated member) shall provide reports of each meeting to chapter members.	Lisa Sterritt
<input checked="" type="checkbox"/>	Highly recommended	Regularly provide chapter activity reports and photos to ALA headquarters for inclusion in various ALA publications. Submit details to <a href="mailto:chapters@alanet.org">chapters@alanet.org</a> .	Tara Bing
<input checked="" type="checkbox"/>	Highly Recommended	Enter at least one educational program summary and evaluation into <a href="#">ALA's Chapter Education Database</a> . Preference is to provide submissions for all quality education programs, especially when an outside speaker is used. Use <a href="#">evaluation forms and summary forms</a> to compile data.	Tara Binge
<input checked="" type="checkbox"/>	Highly recommended	Upload chapter newsletters, news blasts, and chapter meeting minutes to the <a href="#">chapter's online community</a> regularly (bi-monthly preferred).	Sean Monahan
<input checked="" type="checkbox"/>	Highly recommended	Actively promote the social media postings of the international Association by liking, sharing, retweeting and/or reposting from chapter accounts.	Denny Krantz
<input checked="" type="checkbox"/>	Recommended	Make a monetary donation to <a href="#">the Foundation</a> or donate an item to the Silent Auction for the Annual Conference.	Sean Monahan

Responsibilities to the Association: 7 Required (7) 7 Highly Recommended (7) 1 Recommended (1)

## SUMMARY

Responsibilities to Chapter Members:	<u>4</u> Required (4)	<u>6</u> Highly Recommended (6)	<u>3</u> Recommended (5)
Responsibilities to Chapter Mgmt:	<u>8</u> Required (8)	<u>6</u> Highly Recommended (6)	<u>1</u> Recommended (5)
Responsibilities to Business Partners:	<u>3</u> Required (3)	<u>3</u> Highly Recommended (3)	<u>3</u> Recommended (3)
Responsibilities to the Association:	<u>7</u> Required (7)	<u>7</u> Highly Recommended (7)	<u>1</u> Recommended (1)
TOTAL:	<u>22</u> Required (22)	<u>22</u> Highly Recommended (22)	<u>8</u> Recommended (14)

### REQUIREMENTS FOR PRESIDENTS' AWARD OF EXCELLENCE:

Required categories*	22 out of 22
Highly Recommended categories	16 out of 22
Recommended categories	7 out of 14

\*These items are required for attaining the Presidents' Award of Excellence recognition

**AFFIRMATION STATEMENT – PRESIDENTS’ AWARD OF EXCELLENCE**

As the Chapter President, I affirm the information above is true and accurate to the best of my knowledge. I understand ALA reserves the right to verify the accuracy of the information submitted.

Puget Sound Association of Legal Administrators  
Chapter Name

Sean Monahan  
Chapter President’s Name (please print)

\_\_\_\_\_  
Chapter President’s Signature

sean.monahan@foster.com  
Email Address

206-447-6265  
Telephone Number

\_\_\_\_\_  
Date

Completed entry forms must be submitted to [awards@alanet.org](mailto:awards@alanet.org) on or before February 28, 2018.