



Call for Presentations

The Education Committee of the Philadelphia Chapter of the Association of Legal Administrators (ALA) is seeking your expertise in presenting high-level, relevant and thought-provoking ideas pertinent to law firm management and administration. Our Chapter is seeking qualified professionals to present 1-hour, topic-specific education programs starting in March 2020.

The Chapter will produce five programs between March and November. Dates and times will be determined by the Education Committee and , but programs will be either a breakfast (from 8:30am-9:30am) or a lunch (from 12:00pm-1:00pm). **Presentations will be accepted starting December 1, 2019.**

SUBMISSION DEADLINE: January 20, 2020. Submissions should be emailed to education@ala-phila.org. **Business Partners must pay their 2020 sponsorship fee in full by the deadline in order for their presentations to be considered.**

COST: Business Partners will pay a percentage of the event cost for the venue and catering based on their sponsorship level. BPs are responsible for all of the education materials (hand-outs, books, etc.) costs. Overall, the cost for these events will be nominal.

VENUE: The Chapter will select the venues and, typically, they will be either a law firm conference room or a conference center space for which venue fees are minimal. If a Business Partner has a suitable conference space, the event can be booked in that location.

TOPICS: Members identified topics of interest in a brief survey in July 2019, which business partners can consider (Survey results – page 4). However, Business Partners are encouraged to get creative and submit any innovative or trending subject relevant to the business of law. We do ask that you avoid topics that were presented in 2019 (2019 presentations – page 5).

CREDENTIALING: Presentations are being vetted to satisfy the requirements for Certified Legal Manager (CLM[®]) credentialing. A Certified Legal Manager (CLM[®]) is recognized as a legal manager who meets certain experience and education requirements, and displays a commitment to their professional development by passing a comprehensive exam. CLM[®] designees must also attend continuing education programs annually to maintain their certification.

These **education programs are for all members**, not just those seeking CLM[®] certification or recertification. Our Chapter uses the CLM[®] vetting guidelines to ensure that all education programs meet a quality standard of content that will be of greatest benefit to our members.

REVIEW PROCESS: Presentations will be reviewed by the Education Committee of the Philadelphia Chapter, which consists of ten members who have roles at their firms ranging from Firm Administrator to Director of HR to Chief Operating Officer.

The Education Committee will evaluate the presentations based on the following criteria (CLM[®] Guidelines):

- Is the topic content current, relevant, pragmatic and concise?
- Will the presentation answer the “How” to legal management issues?
- Will the presentation appeal to seasoned legal managers and administrators?
- Is the presentation well organized and designed to meet the needs of the legal management audience?
- Can the presentation content be delivered clearly and effectively in 1 hour?
- Does the presentation have 3-5 clearly identified learning objectives?

Submission and Selection Process

Submission Requirements:

- All programs will be presented in PowerPoint.
- Submit a brief overview of the program including:
 - General statement of purpose What is this presentation about?
 - 3-5 Learning Objectives
- **Submit a COMPLETE presentation either in PowerPoint or PDF format. No outlines will be accepted.**
- Submit Speakers' contact information: email, phone number and bio. 1 or 2 speakers permitted per presentation.
- Submit all hand-outs or supplemental resource material.
- Submit two references to prior speaking engagements. To whom has the speaker presented? Share video links or past program evaluations. If the speaker has presented at an ALA event, state the event, date and title of presentation.
- Submit Company logo (JPG or PDF version) for promotion and marketing purposes.
- **Presentations should be emailed to education@phila-ala.org.**

Submission Timeline:

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| • December 20 | OPEN Call for Presentations |
| • January 20 | DEADLINE Call for Presentations |
| • February 10 | Presentations selected; Business Partners notified |
| • March - November | Program dates/venues confirmed |

Our Mutual Commitment:

- Speakers agree to have paid their 2020 sponsorship fee in full prior to presentation submission.
- Speakers recognize that the presentation is not a platform for business promotion, but an opportunity to share information, knowledge and expertise.
- Speakers agree to the Chapter's Speaker Guidelines (page 3), and to have reviewed the ALA national policies.
- Speakers should make themselves available to attendees via email or phone for follow-up questions post event.
- Speakers agree to keep confidential the attendee contact information. Do not share or distribute the information to any other party (within or outside of your organization).
- Speakers have the opportunity to promote the event to ALA Chapter members via one email blast approximately 2 weeks prior to the event.

In turn, our Chapter will:

- Actively promote the event through emails, our Chapter website and social media (LinkedIn, Facebook and Twitter).
- Publicize the event to regional Chapters in PA, DE and NJ to maximize attendance. While the Chapter will heavily promote your program, the Chapter cannot guarantee a specific number of attendees.
- Provide speaker with the attendee list and evaluation survey results after the event.
- Archive the presentation on our Chapter's website and publicize archives to all members for review and self-study.
- Feature speaker and program in our Chapter's President's Newsletter.

Speaker and Presentation Guidelines

The Philadelphia Chapter seeks to promote and enhance both the competence and professionalism of legal management. In our learning events we strive to:

- Cover current issues affecting legal managers.
- Provide comprehensive, competency-based educational programs that offer appropriate levels of knowledge and skill-building opportunities.
- Provide educational opportunities led by recognized experts in the field.
- Offer continuing education credits for the Certified Legal Manager (CLM®) designation.

In addition to providing competency-based content, the Chapter expects all speakers to comply with guidelines set forth by the Chapter:

- Speakers are prohibited from overtly selling or promoting any product or service during the presentation and from denigrating any competitor, whether implied or in fact.
- Speakers agree that education content including presentations and hand-out materials presented to members of the Chapter, becomes the property of the Chapter. Speakers grant the Chapter the right to use, reproduce, archive, distribute, post on the Chapter's website or share on social media, in whole or in part, the education content for the benefit of the membership.
- Speakers cannot substantially modify their presentations from the approved version. Substantial changes to a presentation must be reviewed and approved by the Education Committee.
- Speakers can co-present, but a panel discussion is not an acceptable format for credentialed education programs.
- Speakers are expected to be sensitive to diversity regarding race, color, religion, sex, gender identity, national origin, age, disability and political affiliation or belief. The Chapter asks that speakers use inclusive language strategies that demonstrate respect for all individuals and cultures.
- Speakers should be sensitive to their choice of language and use of anecdotes. Use non-sexist language throughout presentations and avoid gender-biased comments (e.g., assuming all secretaries are female, all lawyers are male). Personal political and religious comments are also off limits.
- Speakers can offer CLE (Continuing Legal Education [for lawyers]), SHRM (Society for Human Resource Management) Professional Development or other relevant continuing education credits to the Chapter's membership and are encouraged to do so.

ALA National Guidelines and Policies

ALA's Member-to-Member Non-Solicitation Policy:

<http://www.alanet.org/docs/default-source/default-document-library/3-ala-non-solicitation-policy.pdf?sfvrsn=0>

ALA Antitrust Guidelines:

<http://www.alanet.org/docs/default-source/governance-documents/antitrust-guide.pdf?sfvrsn=0>

Association of Legal Administrators Speaker Guidelines for ALA Conference Presenters:

<http://www.alanet.org/docs/default-source/Speaker-Resources/speaerguide.pdf?sfvrsn=2>

If you have questions, or need additional information, please do not hesitate to contact our Education Committee: Marie Von Feldt, Andrea LeRoy and Bob Tague at education@phila-ala.org



Philadelphia Chapter Survey

July 2019

EDUCATION EVENTS QUESTION:

PLEASE LET US KNOW WHAT EDUCATION SESSIONS YOU WANT TO SEE FROM THE PHILADELPHIA ALA CHAPTER NEXT YEAR (2020).

ANSWERS:

1. ATTORNEY RECRUITING AND DEVELOPMENT
2. DATA BREACHES AND POLICIES
3. DEALING WITH PROBLEM EMPLOYEES, EMPLOYEE RETENTION
4. BUSINESS CONTINUITY
5. RISK MANAGEMENT TOPICS ACROSS ALL FUNCTIONAL AREAS – IT/DATA, PERSONNEL/MALPRACTICE INSURANCE, FACILITIES/BUSINESS INSURANCE
6. BUSINESS DEVELOPMENT SKILLS FOR ATTORNEYS
7. CHANGE MANAGEMENT AND MEASURABLE SUCCESS
8. RECRUITING TOPICS (ALL)
9. PROPER PROCEDURES FOR HANDLING UNEMPLOYMENT CLAIMS
10. HUMAN RESOURCES (GENERAL)
11. LEADERSHIP SKILLS/DEVELOPMENT
12. STAFF RECRUITMENT; CREATIVE RECRUITING TECHNIQUES
13. INFORMATION TECHNOLOGY
14. PROJECT MANAGEMENT
15. SMART INVESTING
16. STAFFING EFFICIENCIES
17. MENTORING (ATTORNEYS AND STAFF)
18. WELLBEING
19. CONFLICT MANAGEMENT
20. PRACTICAL CYBERSECURITY TRAINING (TO TEST/PASS ON TO FIRM)
21. HOW TO MEASURE PROFITABILITY AND PRODUCTIVITY
22. HR TOPICS – NEW LAWS/REGULATIONS FOR 2020

2019 EDUCATION PRESENTATIONS

Following is a list of programs presented in 2019. The Education Committee asks that you do not submit a presentation on a similar topic, unless you feel confident that your approach to the topic is unique and innovative.

- Harassment: 21 Danger Zones in Preventing and Responding to It
 - a. Harassment defined; prohibited behaviors
 - b. Robust compliance and procedures; creating the right environment (no retaliation)
- Managing Privacy and Law Firm Risk:
 - a. Legislative & regulatory updates
 - b. Best practices for managing personal data and risk
- Active Shooter Preparedness
- Panel Presentation on Aging in the Workplace
 - a. General discussion of age discrimination
- Mindfulness Based Stress Reduction (MBSR)
 - a. A Jefferson University Hospital training program
- Employee Benefits and ERISA Regulations
 - a. Emphasis on 401K benefits and management
- Designing the Legal Office of Tomorrow
 - a. Trends in law firm interior design
- Journey Into the Cloud
 - a. Requirements for security, data management and processes
- Ethics of eDiscovery
 - a. Understanding the ABA's Model Rules of Professional Conduct
 - b. Confidentiality provisions affecting gathering, storing, reviewing and producing data
- Administrator's Technology Toolkit
 - a. Overview of IT technology, terms and trends for the law firm administrator
- Employee Turnover/Termination Forensic Best Practices
 - a. Evaluating and securing digital data to mitigate employee disputes
- Future of Employee Benefits: Healthcare for the Phila. Firm
 - a. Overview of premiums, claims funding, HRAs/HSAs/FSAs
 - b. How technology and benchmarking play a role in planning
- Bank and Payment Fraud
 - a. Type of fraud
 - b. Best practices for reducing risk
- Legal Lean Six Sigma
 - a. Six Sigma methodology of waste reduction and improved efficiencies applied to the business of law
- Cybersecurity: Staying safe in 2020
 - a. New security threats and actions firms can take to minimize exposure
- Trends in Legal Marketing 2020
 - a. Overview of 2019 Legal Market and new marketing strategies for 2020.