

CLM CHAPTER PRESIDENT

The President is responsible for leading the Chapters toward fulfilling the goals of the CLM at the local level. The President oversees Chapter leadership and committees and encourages teamwork while also leading and maintaining the operations of the Chapters. As President, you are a CLM ambassador to the insurance and defense communities and you help recruit additional members.

Term Length: One Year (Inaugural Chapter leadership roles are two years, but subsequent terms will be only one year) There can be no more than 3 Members (outside defense counsel) in Leadership Roles.

No Vendor or Service Provider may serve in a Leadership Role.

Time Commitment: 2 Hours per week/more at key times throughout the year

Responsibilities:

- Achieve all Chapter vision, mission, and objectives
- Preside all Chapter events and leadership meetings
- Appoint alternate if you are unavailable to attend a meeting/event
- Meet with all Chapter Board members to examine the Chapter's finances, sponsorships, goals, and improvements before the end of the year
- Prepare and facilitate leadership meeting agendas
- Hold monthly leadership meetings to ensure Local Chapter events are progressing on time
- Monitor progress of Chapter goals and objectives
- Participate in all Regional Chair calls
- Keep current with CLM initiatives
- Serve as the Chapter spokesperson

Qualifications

- In-depth knowledge of the CLM
- Service of at least one term in another CLM officer position
- Ability to delegate
- Strong public speaking and presentation skills
- Excellent leadership, communication, and interpersonal skills

Success Measures

- Increased Chapter Membership
- Chapter participation and engagement in attaining objectives at the local level
- Strong recruiting and retention initiatives
- Active and growing committee structure
- Accessibility to Chapter leadership and members
- Facilitation of productive and efficient meetings
- Positive Role Model for Chapter leaders and members

Benefits

- Gain experience in building and working with committees
- Play a key role in building Chapter strategy
- Opportunity to network on several levels
- Be a mentor to new members and volunteers
- Gain leadership experience that can be used in connection with your current employment

Chapter President Name

President Signature

Date

CLM CHAPTER VICE PRESIDENT

The Vice-President is responsible for assisting the President in coordinating and directing committee activities and Local Chapter operations. The Vice- President shall work with the President and the Board to meet CLM objectives and assist with new member recruitment.

Term Length: One Year (Inaugural Chapter leadership roles are two years, but subsequent terms will be only one year)

Time Commitment: 2 Hours per week/more at key times throughout the year

Responsibilities:

- Attend all Chapter events and leadership meetings
- Strive to achieve the Chapter vision, mission, and objectives
- Monitor progress of Chapter goals and objectives
- Support and assist the President by overseeing internal operations
- Ensure that event expenditures match event budgets
- Assume the President's role in his/her absence
- Help oversee the successful planning and implementation of Chapter events
- Recognize and celebrate outstanding members who assist with recruitment

Qualifications

- In-depth knowledge of the CLM
- Service of at least one term in another CLM officer position
- Ability to delegate
- Strong public speaking and presentation skills
- Excellent leadership, communication, and interpersonal skills

Success Measures

- Increased Chapter Membership
- Meet or exceed Chapter goals.
- Chapter membership recruitment and retention.
- Strong recruiting and retention initiatives.
- Timely handling of issues/concerns of Leadership team and members.
- Accessibility to Chapter leadership and members

Benefits

- Gain experience in building and working with committees
- Improve meeting management skills
- Opportunity to network on several levels
- Be a mentor to new members and volunteers

- Gain leadership experience that can be used in connection with your current employment.
- Steppingstone to Chapter Presidency

Chapter Vice President Name

Vice President Signature

Date

CLM SECRETARY

The secretary is responsible for maintaining Chapter records and assisting in obtaining sponsorships for the Local Chapter events throughout the year. The Secretary shall work with the President and the Board members to meet CLM objectives and assist with new member recruitment.

Term Length: One Year (Inaugural Chapter leadership roles are two years, but subsequent terms will be only one year)

Time Commitment: 2 Hours per week/more at key times throughout the year

Responsibilities:

- Attend all Chapter events and leadership meetings
- Work with Vice-President and Directors to ensure events are well planned and executed
- Record and prepare meeting minutes
- Distribute meeting minutes to all leadership members following the approval of the President
- Maintain all Chapter records
- Strive to achieve the Chapter vision, mission, and objectives
- Work closely with the Vice-President on membership initiatives
- Ensure Chapter membership is current in CLM database

Qualifications

- In-depth knowledge of the CLM
- Good record keeping skills
- Proficient at note taking
- Ability to delegate

Success Measures

- Meeting minutes distributed on a timely basis
- Records maintained properly and accurately
- Sponsorship of events runs smoothly
- Meet or exceed Chapter goals

Benefits

- Gain Experience in Building and working with committees
- Improve meeting management skills
- Gain experience that can be used in connection with your current employment
- Networking opportunities
- Steppingstone to chapter Vice President.

Secretary Name:

Secretary Signature

Date

CLM CHAPTER DIRECTOR OF EVENTS

The Director of Events is responsible for the planning and delivery of the Chapter's social and networking events. The Director will work to identify venues and/or partner organizations to deliver opportunities for members to attend and network Chapter events that allow them to build and grow their professional network of contacts and colleagues. The Director of Events shall work with the Chapter leaders to meet CLM objectives and assist with new member recruitment.

Term Length: One Year (Inaugural Chapter leadership roles are two years, but subsequent terms will be only one year)

There can be no more than 3 Members (outside defense counsel) in Leadership Roles No Vendor or Service Provider may serve in a Leadership Role

Time Commitment: 2 Hours per week/more at key times throughout the year

Responsibilities:

- Attend all Chapter events and leadership meetings
- Strive to achieve the Chapter vision, mission, and objectives
- Engage with Chapter leadership and CLM Administrative staff on event date selection, sponsorships, budgets, venue selection, contracts, and invitations
- Manage Chapter budgets including expenditures for events – not to exceed the sponsorship revenue per event
- Arrange Speakers and panel members according to The CLM guidelines
- Support the Director of Education in coordinating educational events
- Meet the event form submission deadlines to allow time for approvals
- Set the direction of the Chapter for continued success by overseeing social and networking components of events
- Work with Chapter leadership to assist in planning at least three events per year
- Recruit vendor sponsorships for all events
- Keep the President updated on all events
- Actively improve networking opportunities for members

Qualifications

- In-depth knowledge of the CLM
- Highly effective organizational skills
- Ability to utilize contacts and network to create meaningful social and networking events
- Profit & loss experience

Success Measures

- Administer, at minimum, three accredited educational and/or networking events annually

- Meet all timelines to deliver successful educational and networking events.
- Accurate record keeping.
- Timely handling of inquiries/issues/concerns of leadership team, members, and sponsors
- Accessibility to officers and members
- Develop a network of vendors for sponsorship for all events.
- Manage the event budget to not exceed available sponsorship revenue.

Benefits

- Gain Experience in Building and working with committees
- Improve meeting management skills
- Gain experience that can be used in connection with your current employment
- Networking opportunities

Director of Events Name:

Director of Events Signature

Date

CLM CHAPTER DIRECTOR OF EDUCATION

The Director of Education is responsible for the planning and delivery of the Chapter's educational events. The Director will work with SMEs and other resources to identify key learning objectives and work to create quality educational content. The Director of Education will work with the Chapter leaders to meet CLM objectives and assist with new member recruitment.

Term Length: One Year (Inaugural Chapter leadership roles are two years, but subsequent terms will be only one year) There can be no more than 3 Members (outside defense counsel) in Leadership Roles.

No Vendor or Service Provider may serve in a Leadership Role.

Time Commitment: 2 Hours per week/more at key times throughout the year

Responsibilities:

- Attend all Chapter events and leadership meetings
- Work with Chapter leadership and CLM Administrative staff to prepare/organize educational topics and materials for educational events
- Arrange Speakers and panel members according to The CLM guidelines.
- Work closely with the Director of Events
- Set the direction of the Chapter for its continued success by overseeing educational components of local events
- Work with Chapter leadership to assist in developing 2+ events per year
- Recruit and appoint an education committee as necessary
- Keep the President updated on all educational event plans, so the monthly leadership meeting agenda remains current
- Work to enhance networking opportunities for members
- Strive to achieve the Chapter vision, mission, and objectives

Qualifications

- In-depth knowledge of the CLM
- Accurate record keeping
- Highly effective organizational skills
- Ability to utilize contacts and network to create meaningful and relevant educational programs
- Ability to utilize contacts and network to identify potential speakers/presenters

Success Measures

- Increased Chapter Membership
- Deliver two high quality educational program events annually
- Timely handling of inquiries/issues/concerns of leadership team and members
- Accessibility to officers and members

Benefits

- Gain experience in building and working with committees
- Gain leadership experience that can be used in connection with your current employment
- Improve meeting management skills
- Strengthen time management skills

Director of Events Name

Director of Events Signature

Date