



CLM

CLM
CHAPTER
MISSION &
GUIDELINES





Table of Contents

<i>Planning Chapter Events</i>	3
Date Selection.....	3
<i>Sponsorships</i>	3
Tier 1: General Sponsor Level - \$1,050 per event	3
Sponsor benefits.....	3
Tier 2: Supporter Level Sponsor- \$650 per event.....	3
Local Chapter Diamond Sponsorship	4
Benefits of Diamond Sponsorship Include	4
Exclusive Event Sponsorship: \$2,500.....	4
Details may include	4
Cost	5
Sponsorship Agreements	5
Postpone/Rescheduling/Cancellation	5
Selecting a Venue.....	6
Networking Event.....	6
Education and Networking.....	6
Food and Beverage.....	6
Contracts Payment.....	6
Expect the following typical charges.....	6
Education	7
<i>CE/CLE</i>	
Speakers.....	7
Local Chapter Event Set-up Requirements	7
<i>Executing Chapter Events</i>	7
Promoting Your Event.....	8
Chapter Leadership should.....	8
Day of the Event	8
Post-Event Details.....	9
<i>Online Event Submission Form</i>	9

The Mission of CLM Local Chapters is to create events and opportunities for the benefit of CLM fellows, members, and sponsors to participate in educational and networking programs in the local markets. CLM Local Chapters are expected to hold up to three events annually with at least one of the events including an educational component.

The chapter guidelines include all the information CLM Local chapter leaders need to manage the event planning and delivery process.

Planning Chapter Events

The local chapter will be responsible for coordinating and organizing all matters related to the event, i.e., venue, speakers, educational component (if applicable) and sponsors, when needed. [Date Selection](#)

Dates for CLM Local Chapter events must not coincide with any national or regional CLM event, otherwise referred to as blackout dates. For a complete list of events please access the CLM website. Events should be planned no less than **104 days in advance for educational events to obtain CE/CLE credits and a minimum of 60 days (preferably 90 days) in advance for networking events to ensure adequate time to secure sponsorship.**

Sponsorships

After date selection, CLM Administration must receive a completed local chapter event form with the event date, confirmed sponsors' contact information and speakers (if an education component is included.) Each event must have a minimum of two sponsors and is limited to ten, with no more than three sponsors from competing organizations. Each sponsor is required to be an active Member or Fellow of CLM. The local chapter Leadership and/or the CLM sales team are responsible for obtaining the sponsor's logo and forwarding it to CLM administration.

Tier 1: General Sponsor Level - \$1,050 per event

General Sponsor Level- \$ 1,250 per event for chapters (Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle)

Sponsor benefits:

1. Sponsors may send up to two people per event.
2. The sponsor's logo is displayed on invitations.
3. Listing on the CLM website event and registration page.
4. Signage at the event and a table for marketing materials (if applicable).
5. Sponsors are provided with an attendance list pre-event. The final list will contain email addresses.

Tier 2: Supporter Level Sponsor- \$650 per event

Supporter Level Sponsor-\$800 per event for chapters (Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle)

Sponsor benefits:

1. Sponsors may send one person per event.
2. The sponsor's logo is displayed on invitations.
3. Listing on the CLM website event and registration page.

4. Signage at the event and a table for marketing materials (if applicable).
5. Sponsors are provided with an attendance list pre-event. The list will contain postal mailing addresses. * **(no emails)**

Local Chapter Diamond Sponsorship

- 3 events (\$2,400) OR 4 events (\$3k) (\$800 per event). *
- 3 events (\$3,000) OR 4 events (\$4k) for chapters. *

**Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle*

Chapters may elect to choose four events for their Diamond sponsorships if they have hosted four events in past years and can obtain commitments to meet the expenses.

Benefits of Diamond Sponsorship Include:

1. Sponsors may send two people per event.
2. Company logo on the selected local chapter webpage and registration page throughout the year.
3. Company logo on selected chapter event pages.
4. Company logo featured in selected event invitations.
5. Company logo and designation of Diamond Sponsor at the event and a table for marketing materials (if applicable).
6. Sponsors are provided with an attendance list pre-event. The final list will contain email addresses. *

Exclusive Event Sponsorship: \$2,500

Sponsor benefits:

1. Exclusive logo displayed on two email invitations and chapter websites.
2. Company/firm manages event venue, additional marketing, and event costs.
3. CLM provides an attendance list pre-event for sponsor company use. Includes email addresses.

*Any use of the pre- and post-conference lists will be approved & distributed by CLM administration.

***Diamond sponsorships based on availability.**

All confirmed sponsors are billed for the full sponsorship amount. Goods and services are not accepted in exchange for payment. Sponsors will receive an invoice and sponsorship agreement to sign via DocuSign.

Details may include:

- The location, date, and time of the event
- Time the sponsors should arrive to set up.
- Any changes or event cancellation
- Items that are not allowed i.e., banners & booth-type marketing.
- Table dimensions
- Parking instructions

Sponsors are permitted to bring some giveaways and a shared space should be provided for all sponsor materials. All sponsors are to be treated equally. Sponsors are permitted to do drawings for prizes with the following conditions:

- Winners do not have to be present to win.
- The drawing does not become a focal point for the event to bring added attention to the one sponsor.
- Attending sponsor representatives are not permitted to enter the drawings.

Cost

The local chapter is responsible for determining the budget for the event and ensuring the event is sufficiently funded prior to making any financial commitments for the event.

The local chapter may work with the sales team to secure additional sponsors when the chapter leaders anticipate that the budget for the event and account balance requires additional sponsorship funding. The local chapter may determine the sponsorship funds required based on the anticipated cost of the event.

CLM Chapters are not permitted to use sponsorship revenue for charitable contributions. CLM encourages chapter leaders and members to support and participate in local community service initiatives to serve those in need.

Sponsorship Agreements

The local chapter will provide CLM with a completed local chapter event form that includes a list of secured sponsors. CLM will send an invoice and sponsorship agreement to each sponsor for signature.

The local chapter may make financial commitments for an event but may not exceed the sponsorship revenue from signed sponsorship agreements. **The sponsor's logo will not be added to the event webpage, email invitation or poster until the Agreement has been signed or the invoice has been paid.**

Prior to the local chapter event, CLM will send confirmation of all sponsorship payments to the local chapter leadership. Unpaid sponsorships secured by the local chapter may need communication from the local chapter. **All sponsors must be confirmed no less than 30 business days prior to the event date to be included on the event invitations and sponsor signage.**

Postpone/Rescheduling/Cancellation

CLM local chapters should avoid cancellation of events. If an event needs to be postponed, rescheduled, or cancelled please advise your CLM chapter event coordinator so that appropriate measures can be taken. Additionally, steps should be taken to renegotiate venue contracts and sponsor agreements. Attendees must receive postponement, rescheduling, or cancellation notices with additional posting on social media as needed, to ensure the information is received.

Selecting a Venue

The local chapter will select a venue commensurate with the type of event scheduled.

Networking Event

For a networking only event there are many options. With all options, it is best to give people space to move around and network. For cocktail-type events a few high top tables and bars will aid the flow of the event.

Education and Networking

Some locations charge room fees. Keep this in mind when you are setting up your event. There are ways to be creative. For example, have the front of a larger room set for the education and have the back set for networking.

- For most events, microphones should not be required for speakers.
- Set the room theater style (chairs without tables)
- If AV is required for PowerPoints, many law firms have projectors and screens for presentations. See if one of the local chapter Leaders has AV available for use at the event. This will save you considerable funds.

Food and Beverage

One important note to keep in mind is attrition. When giving your final counts, please be sure to subtract this attrition number from your food and beverage counts to avoid paying for people that will not be in attendance. (Attrition rates range between 10-20%)

- If you would like to do a meal, plated meals are typically less expensive.
- During the meals, have iced tea on the tables in pitchers and do not serve bottled beverages like soda. This will save you a considerable amount of money.
- Bars on consumption can be less expensive. Do not opt to have a bar package per person as many people will only have 1 drink and some do not drink at all.

Contracts Payment

Event locations will require some form of payment. The available forms of payment are AMERICAN EXPRESS and check. The credit card authorization can be submitted via a secure link from the venue and kept on file for final payment. If credit card payments are not permitted, CLM will arrange for payment by check.

A W9 must be obtained from the venue to process a check payment. Except for minor expenses (name badges, posters, printing), all payments will be processed by CLM. Local Chapter leadership must ensure the cost of the event, including venue cost, is covered by sponsor revenue as reflected in signed sponsorship agreements received by CLM.

Expect the following typical charges:

- Venue charges, including any taxes, service charges, etc.
- Food and Beverage, including taxes, gratuities, or other services charges.
- Name Tags
- Printing of poster

- CE and CLE charges – to include event filing and credits for each requiring attendee.

Upon completion of the event, if there are any expenses paid out by the chapter leadership, please forward the receipt or invoice to CLM administration by completing the reimbursement request for prompt reimbursement via the CLM website reimbursement portal. **Expenses will not be reimbursed without detailed receipts.**

<https://www.theclm.org/Member/LocalChapterAccounts>

Education

The education portion should be geared towards a well-rounded audience. For example, negotiation strategies, Medicare compliance, large loss issues, new state regulations and their effect on claims settlement.

CE/CLE

The local chapter is responsible for all aspects of education. If CE/CLE is requested, the local chapter must obtain the outline and PowerPoint (if one is to be used during the presentation) along with the substantive information handout (required) for CE/CLE approval. Education sessions should be limited to 1 – 2 hours for maximum attendance. All CE/CLE must be submitted using CLM's provider information. ***Please note the form must be submitted 104 days in advance for CE/CLE submission.***

Speakers

- For educational events, speakers must be pre-selected, and active registered CLM members.
- Vendors and consultants may not participate on the discussion panel unless they are sponsoring the specific event.
- Each panel must include at least one (1) industry professional.
- Minimum of two (2) with a maximum of four (4) speakers/panelists per presentation.
- No more than one speaker from the same firm/company may participate in the same panel/presentation or in an additional presentation given at the same event.
- Local chapter leadership should not be the only speakers at an event presentation.
- There is to be no sales pitching within the educational component.

Local Chapter Event Set-up Requirements

When the local chapter event form is complete and approved by CLM administration, the event will be listed on the CLM website.

Event form and submission requirements for event approval:

- Submission of Event Form prior to 104 days of the educational event or 90 days for a networking only event.
- Be descriptive with your event narrative as this will be transposed to advertise the event on the CLM website.
- Provide all venue details and venue contact information.

- Provide all details including presentation details, if applicable
- Provide contact information for event sponsors.

CLM Chapter Administration

Following CLM's approval of the completed event form and venue contract (if applicable), CLM Administration will:

- Create a link of the event on CLM's website for registration.
- Create and send CLM email invitations, consistent with CLM practices, to the local area CLM members.
- Create a poster and create a Social Media Asset for use on firm and personal media accounts.

Executing Chapter Events

Promoting Your Event

CLM will send an initial email invitation 30 days prior and 7-10 days prior to an event. (2 emails)

Other ways to promote your event are:

- Post on LinkedIn, Facebook, Instagram, #CLM.
- Send emails personally inviting colleagues and clients to the event.
- Ask the sponsors and speakers to invite colleagues and clients to the event.
- ***Chapter leadership may each bring one non-CLM member as a guest per local chapter event.***

Approximately two to four days before an event, CLM administration will provide the following information to the chapter leadership:

- Attendance List - This will be a state-approved format that must be used for sign-in and returned to CLM within 24 hours of the event taking place.
- Sponsor poster – This will have logos of all confirmed sponsors.
- Printed guest name badges.

Chapter Leadership should:

- Purchase name tags and magic markers.
- Appoint one of the chapter leaders to send an email reminder to those scheduled to attend.
- Monitor walk-ins to verify CLM membership and register those people.
- Greet sponsors and guests.

Day of the Event

Chapter Leadership should arrive at the location at least one hour prior to the event.

If an attendee is not listed on the attendance roster, please ask for a business card to obtain all information. Have them sign in legibly on the attendance roster. ***If an unregistered attendee is a vendor, service provider or consultant that is not sponsoring the event, they should not be allowed into the event.*** You can refer non-members to the CLM local chapter team for further assistance.

Post-Event Details

1. The local chapter will provide the signed attendance sheet to CLM administration within 24-hours after the conclusion of the event.
2. CLM administration will send certificates of completion to those in attendance and file for CE/CLE credits upon receipt of attendance sheets for all events with an education component.
3. Local chapter leadership will provide any information on the event to CLM administration to detail how the event fared.
4. The local chapter is encouraged to take photos and forward them, along with a summary description of the event, to maureen.penn@theclm.org.

Online Event Submission Form

The Local chapter event planning form will be completed digitally for every chapter event.

<https://airtable.com/appcdrzVajbKYMrz7/shrGwUPO8MDibMhGU>