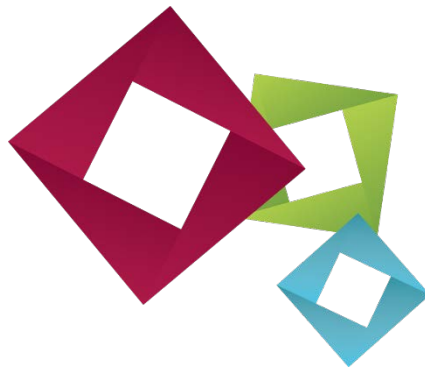


# **LMA REGIONAL GOVERNING BOARD & LOCAL STEERING COMMITTEE ROLE DESCRIPTIONS**



This document was created to provide role descriptions to facilitate a consistent approach to both leadership roles and expectations, outline primary responsibilities and provide a better understanding of the time and commitment necessary for each volunteer leadership role. Please use this document as a guide to better understand the volunteer commitment. By no means is this document meant to be inclusive of all roles and responsibilities as each Region and Local Steering Committee is unique.

### **CRITERIA TO SERVE**

Each nominee must have been a member of the Legal Marketing Association (LMA) for at least one year at the time of nomination.

- A candidate must be a member in good standing (i.e. dues must be current)
- A candidate must have been a member for at least one year in a Local located in the Region that they will serve.
- As applicable, a candidate must have approval of their employer to participate in board service.
- No individual may serve on more than one LMA Board (International, Regional or Local Steering Committee) at any one time.
- A candidate may only apply to one Regional Governing Board/Local Steering Committee.

### **REGIONAL GOVERNING BOARD**

Regional Governing Board Members are bound by the bylaws of LMA International and are expected to:

- Govern Local Steering Committees within their Region
- Uphold the mission, vision and core values of LMA
- Adhere to the policies and procedures of LMA
- Ensure the financial health of the Region
- Participate, as requested, in developing an annual budget for the Region
- Develop a strategic plan and an annual work plan for the Regional Board
- Establish the priorities and scope of work for Regional committees and task forces
- Make decisions according to changing environmental conditions to ensure that LMA is a vibrant, sustainable organization
- Monitor industry and professional trends as a component of their service

In addition, all Regional Governing Board members will deliver on the following responsibilities:

- Attendance Requirements – A board member is expected to be present at all meetings. A leader that is absent for three meetings or more is subject to removal from the board.
- Stewardship – Board members are expected to adopt a broad perspective on the organization's activities and industry developments, raise ideas and suggestions, and both support and communicate the organization's priorities in any way possible.
- Confidentiality – Board members will maintain the confidentiality of all board discussions and will advocate for the official positions of the board.

## **PRESIDENT**

- Act as leader of Regional Governing Board and Local Steering Committees
- Uphold the mission, vision and goals of LMA International at the Regional and Local level
- Plan and execute strategic planning meetings and retreats
- Regularly update the Regional Governing Board on LMA International matters
- Lead and facilitate monthly Board calls and in-person meetings, ensuring that each functional area has the necessary tools to accomplish their goals
- Monitor functional area exchange call attendance
- Serve as Board spokesperson
- Foster positive Board and/or LSC member interactions
- Fulfill fiduciary responsibility through the monitoring of Regional and Local finances
- Participate in Regional Conference planning, if applicable
- Facilitate training and on-boarding for volunteer leaders, with the help of LMA HQ
- Look for opportunities to improve operational efficiencies
- Monitor the wellbeing and workload of Regional Governing Board members
- Make all Regional Committee appointments
- Periodically review and assess Regional Board performance
- Review and provide appropriate recommendations for contracts and similar agreements prior to LMA Executive Director approval

### **Time Commitment**

- 10-12 hours per month
- Lead Regional Governing Board Meetings/Calls and Retreats
- Attend Regional Leaders' Committee Call – Monthly
- Attend Regional Leaders' Committee Meeting – Annual Conference
- Attend LMA Leaders' Conference the year prior to term as President

### **Term Limit**

- One year
- Automatically advances to Immediate Past President after serving as President

### **Characteristics or Prior Experience**

- High emotional IQ
- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Confident in making tough decisions
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Willing to travel to Regional and Local events
- Champion for LMA member needs and the importance of membership
- Desire for leadership comes from a place of good intention and desire to better the organization, not to further a personal agenda
- Prior treasurer experience a plus

## **PRESIDENT-ELECT**

- Observe current Presidential functions as listed above, providing assistance when necessary
- Participate in Regional Conference planning, if applicable
- Identify and evaluate opportunities to improve operational efficiencies

#### Time Commitment

- 5-10 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Attend Monthly Regional Leaders Committee Call – Monthly
- Attend LMA Leaders' Conference the year prior to term as President-Elect

#### Term Limit

- One year
- Automatically advances to President after serving as President-Elect

#### Characteristics or Prior Experience

- High emotional IQ
- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Confident in making tough decisions
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Willing to travel to Regional and Local events
- Champion for LMA member needs and the importance of membership
- Desire for leadership comes from a place of good intention and desire to better the organization, not to further a personal agenda

#### **IMMEDIATE PAST PRESIDENT**

- Provide advice and leadership to the Regional Governing Board of Directors regarding past practices and other matters
- Support the President and President-Elect as needed
- Serve as Regional Nominating Committee Chair
- Manage Regional and Local nominations process

#### Time Commitment

- 4-5 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats

#### Term Limit

- One year

#### Characteristics or Prior Experience

- Served as prior year Regional President
- High emotional IQ
- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Confident in making tough decisions
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Willing to travel to Regional and Local events
- Champion for LMA member needs and the importance of membership
- Desire for leadership comes from a place of good intention and desire to better the organization, not to further a personal agenda

#### **SECRETARY**

- Record Regional Governing Board minutes
- Draft and distribute board meeting/retreat "Action Items"
- Maintain all necessary records and other materials

#### Time Commitment

- 2-5 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats

#### Term Limit

- Two years

#### Characteristics or Prior Experience

- Exhibit keen attention to detail
- Possess strong organizational skills
- Demonstrate exemplary note-taking ability
- Ability to distill important information from a large amount of content

#### **TREASURER**

- Weekly Responsibilities
  - Approve Regional and Local expenses
- Monthly Responsibilities
  - Review monthly financial statements and disperse them to relevant Local Steering Committee
  - Collaborate with Sponsorship Director to manage invoices and ensure payment
  - Provide Regional finance reports as requested
- Quarterly Responsibilities
  - Submit Regional budget forecast to LMA HQ
  - Monitor unpaid invoices
- Annual Responsibilities
  - Collaborate with Regional Governing Board and Local Steering Committee Chairs to create Regional budget
  - Submit annual report
- As Needed
  - Manage accounts payable/receivable
  - Coordinate wire-payments with LMA HQ
  - Circulate expense reimbursement docs and policies
  - Train Local leaders on budget management and oversight

#### Time Commitment

- 7-10 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in Regional Treasurer Training

#### Term Limit

- One year

#### Characteristics or Prior Experience

- Possess strong financial acumen
- Exhibit basic fundraising knowledge or experience
- Intermediate Microsoft Excel experience
- Demonstrate attention to detail
- Knowledge of common nonprofit business and accounting practices a plus

### **TREASURER-ELECT**

- Observe current Treasurer functions as listed above, providing assistance when necessary
- Identify and evaluate opportunities to improve operational efficiencies

#### Time Commitment

- 2-5 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in Regional Treasurer Training

#### Term Limit

- One year
- Automatically advances to Treasurer after serving as Treasurer-Elect

#### Characteristics or Prior Experience

- Possess strong financial acumen
- Exhibit basic fundraising knowledge or experience
- Intermediate Microsoft Excel experience
- Demonstrate attention to detail
- Knowledge of common nonprofit business and accounting practices a plus

### **DIRECTOR AT LARGE**

Each Region has distinctive goals and needs that are always evolving, and it is at the discretion of the Regional Governing Board to define the necessary functional areas and identify volunteer leader(s) that can best support the coinciding responsibilities. The role descriptions below are functional areas to be assigned to a named position or a Director at Large position as the President deems necessary.

### **DIRECTOR AT LARGE – MEMBERSHIP**

- Champion for LMA member needs and the importance of membership
- Ensure consistency among recruitment, renewal and lapsed membership communications
- Oversee new member engagement process
- Review membership data at the Regional level and provide actionable recommendations to Local Steering Committees (LSCs) to help achieve membership goals
- Lead new member engagement at the Regional Conference (if applicable) and Annual Conference
- Serve as a resource for Regional Boards and LSCs regarding membership efforts
- Update Regional Member Benefits Packets
- Draft and deploy membership surveys

#### Time Commitment

- 5-7 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in Member Engagement Committee Exchange calls
- Lead regular check-in calls with LSC membership leads

#### Term Limit

- Two years

#### Characteristics or Prior Experience

- Responsive to membership needs
- Comfortable explaining current membership benefits
- Willing to attend Regional and Local events in an effort to help engage members

#### **DIRECTOR AT LARGE – COMMUNICATIONS**

- Review and approve Regional communications
- Collaborate with LSC communication leads
- Update Region website
- Maintain Region mailing list
- Coordinate preparation and distribution of the Regional Newsletter
- Manage applicable social media platforms

#### Time Commitment

- 5-7 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in Marketing and Communications Exchange calls
- Complete HubSpot training
- Lead regular check-ins with LSC communications leads

#### Term Limit

- Two years

#### Characteristics or Prior Experience

- Exhibit exemplary writing and proofreading skills
- Possess ability to prioritize information and communicate effectively
- Demonstrate strong organizational skills
- Have familiarity with major social media platforms

#### **DIRECTOR AT LARGE – REGIONAL PROGRAMING**

- Champion quality educational programming and resources throughout Region
- Coordinate and oversee Regional programming, including the budget and schedule/calendar of events
- Propose new and innovative programming ideas
- Contribute to Regional Conference programming development
- Determine and monitor programming budget compliance
- Leverage the Body of Knowledge; ensure mapping to the BoK

#### Time Commitment

- 5-7 hours monthly
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in monthly Regional Programming Exchange call
- Complete Socius training
- Lead regular check-ins with LSC programming leads

#### Term Limit

- Two years

#### Characteristics or Prior Experience

- Possess strong project management experience

- Demonstrate the ability to coach and help others
- Exhibit exemplary organizational skills
- Serve as programming trend spotter

#### **DIRECTOR AT LARGE – SPONSORSHIP**

- Ensure the Region has financial resources to serve its members with high-quality programs and social events
- Pitch to, negotiate terms with, and pursue potential sponsors
- Develop a pipeline of prospective sponsors
- Define regional sponsorship offerings
- Draft and execute communications to prospective sponsors
- Acquire Regional Conference sponsorships
- Support LSC sponsorship leads to ensure that local groups also meet their sponsorship goals
- Ensure fulfillment of contracted sponsorship agreement
- Ensure sponsors have a positive experience
- Report sponsorship progress to Regional Governing Board

#### **Time Commitment:**

- 5-7 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Participate in monthly Regional Sponsorship Exchange call
- Lead regular calls with Local sponsorship leads

#### **Term Limit**

- Two years

#### **Characteristics or Prior Experience**

- Possess exemplary writing, speaking, and conversational skills
- Demonstrate the ability to negotiate
- Exhibit a strong understanding of regional legal marketing industry
- Goal-oriented

#### **DIRECTOR AT LARGE – LOCAL STEERING COMMITTEES**

- Serve as conduit between the Regional Governing Board and LSCs within Region
- Coordinate monthly calls with LSC Chairs to facilitate the exchange of ideas and best practice sharing
- Provide LSCs with relevant Regional and LMA HQ updates
- Coordinate and deliver LSC Chair on-boarding and training prior to the start of their term
- Update LSC training materials and resources as needed
- Respond to LSC inquiries as needed

#### **Time Commitment:**

- 5-7 hours per month
- Attend Regional Governing Board Meetings/Calls and Retreats
- Lead regular calls with Local Chairs

#### **Term Limit**

- Two years



#### Characteristics or Prior Experience

- High emotional IQ
- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Champion for LMA member needs and the importance of membership

## **LOCAL STEERING COMMITTEE (LSC)**

### **CHAIR**

- Lead local activities
- Serve as liaison between the Regional Governing Board and Local members
- Collaborate with Regional Treasurer to set Local budget
- Preside over LSC meetings and initiatives
- Oversee the roles and responsibilities of all LSC members, identifying and overseeing progress toward identified goals
- Oversee implementation of Regional Governing Board directives with respect to Local membership
- Report LSC activities and goals to the Regional Governing Board
- May assume additional responsibilities based on committee size and needs

#### Time Commitment

- 5-7 hours per month
- Attend Local Steering Committee Meetings

#### Term Limit

- One year

#### Characteristics or Prior Experience

- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Exhibit strong organizational skills
- Willing to attend Local events
- Champion for LMA member needs and the importance of membership

### **VICE CHAIR**

- Observe current LSC Chair functions as listed above, providing assistance when needed
- Look for opportunities to improve operational efficiencies
- Preside over LSC meetings in the absence of the LSC Chair
- May assume additional responsibilities based on committee size and needs
- Monitor monthly financial statements and provide to LSC at monthly meetings
- Facilitate payment of invoices and expense reimbursements through Administrator

#### Time Commitment

- 5-7 hours per month
- Attend Local Steering Committee Meetings

#### Term Limit

- One year

#### Characteristics or Prior Experience

- Possess the ability to adequately communicate with and strategically advise various volunteer leaders
- Comfortable addressing large groups, with the willingness to listen to new ideas
- Exhibit strong organizational skills

- Willing to attend Local events
- Champion LMA member needs and the importance of membership

#### **SECRETARY**

- Record Local Steering Committee meeting/retreat minutes
- Draft and distribute committee meeting/retreat “Action Items”
- Maintain all necessary records and other materials
- May assume additional responsibilities based on committee size and needs

#### Time Commitment

- 2-5 hours per month
- Attend Local Steering Committee Meetings

#### Term Limit

- One year

#### Characteristics or Prior Experience

- Exhibit keen attention to detail
- Possess strong organizational skills
- Demonstrate exemplary note-taking ability
- Ability to distill important information from a large amount of content

#### **MEMBER AT LARGE**

- Serve as ambassador to members and potential members through Local event participation
- Help recruit prospective members and encourage volunteer leadership
- May serve as either the Chair of or a liaison to one or more specific Local committees
- May be assigned special projects by the LSC Chair

#### Time Commitment

- 3-5 hours per month
- Attend Local Steering Committee Meetings and events

#### Term Limit

- One-Two years

#### **MEMBER AT LARGE – SPONSORSHIP**

- Ensure the Local Steering Committee has financial resources to serve its members with high-quality programs and social events
- Pitch to, negotiate terms with, and pursue potential sponsors
- Develop a pipeline of prospective sponsors
- Define the Local Steering Committee sponsorship offerings in conjunction with Regional sponsorship
- Draft and execute communications to prospective sponsors
- Report sponsorship progress to Regional Governing Board
- Fulfill the contracted sponsorship agreement
- Ensure sponsors have a positive experience

#### Time Commitment:

- 3-5 hours per month

- Attend Local Steering Committee Meetings

Term Limit

- One-Two years

Characteristics or Prior Experience

- Possess exemplary writing, speaking, and conversational skills
- Demonstrate the ability to negotiate
- Exhibit a strong understanding of regional legal marketing industry

**MEMBER AT LARGE – MEMBERSHIP**

- Champion LMA membership
- Ensure consistency among recruitment, renewal and lapsed membership communications
- Review membership data at the Local level and provide actionable recommendations to help achieve membership goals
- Coordinate with Regional Director at Large - Membership

Time Commitment

- 3-5 hours per month
- Attend Local Steering Committee Meetings

Term Limit

- One-Two years

Characteristics or Prior Experience

- Responsive to membership needs
- Comfortable socializing current membership benefits
- Willing to attend Local programming in an effort to help engage members
- Champion for LMA member needs and the importance of membership

**MEMBER AT LARGE – LOCAL PROGRAMMING**

- Champion quality educational programming throughout Local group
- Coordinate and oversee Local programming
- Determine and monitor budget
- Provide Local Steering Committee programming reports as requested
- Leverage the Body of Knowledge; ensure mapping to the BoK
- Collaborate with Local Steering Committee sponsorship lead to ensure sponsorship fulfillment
- Coordinate with Regional Director at Large – Programming

Time Commitment

- 3-5 hours per month
- Attend Local Steering Committee Meetings
- Complete Socius training

Term Limit

- One-Two years

Characteristics or Prior Experience

- Possess strong project management experience

- Demonstrate the ability to coach and help others
- Exhibit exemplary organizational skills
- Serve as programming trend spotter

#### **MEMBER AT LARGE – EVENTS**

- Confirm event details with speaker and venue
- Manage speaker reimbursement process
- Finalize attendee list and F&B requirements
- Oversee event registration and logistics

#### **Time Commitment**

- 3-5 hours per month
- Attend Local Steering Committee Meetings

#### **Term Limit**

- One-Two years

#### **Characteristics or Prior Experience**

- Willing to attend Local events
- Ability to multi-task
- Familiarity with event management
- Exemplary organizational skills