



## Chapter Visit Toolkit

As an ALA leader, visiting another chapter is a unique opportunity to be an ALA ambassador. This Chapter Visit Toolkit serves as a guide for discussing plans and logistics regarding a chapter visit. The key to a successful chapter visit is to have early dialog with the chapter representative about expectations and cost sharing.

Regardless of the main purpose of the chapter visit, please **bring along a copy of the [Presidents' Award of Excellence](#) document and the [Chapter Performance Objectives](#)**, as these are the blueprints for effective chapter management. Plan to take some time during your visit to go over the guidelines with the chapter, particularly with the chapter's President and President-Elect/Vice President.

It is important to **get to know the chapter** prior to your visit. There are helpful resources available to you in the Chapter Resource Team Community and through ALA Headquarters staff that you should review including:

- ✓ Chapter Profiles (send request for chapter profile information to [chapters@alanelt.org](mailto:chapters@alanelt.org))
- ✓ Chapter Charter Dates
- ✓ Chapter Demographic Profiles

In addition, it is **recommended** that you:

- ✓ Review the [chapter's website](#) (and social media), and become familiar with the chapter leaders
- ✓ Check with the Chapter Resource Team and focus chapter liaison to see if there is anything noteworthy going on with the chapter
- ✓ Contact [chapters@alanelt.org](mailto:chapters@alanelt.org) for additional background information about the chapter
- ✓ Ask the Chapter President for background on the chapter, including:
  - Leadership and member participation and development
  - Succession planning
  - Business partner participation
  - How can the Chapter Resource Team, ALA staff or other leaders assist?

Talk openly with the Chapter President about **costs associated with the trip**. Let the Chapter President know that ALA recommends a visit from someone from the leadership team every year or two. Discuss the preference to have the chapter pay travel costs, but if the chapter does not have the funds available, ALA Headquarters will cover the cost upon prior approval, or there will be cost sharing. Here is a sample email:

"I am a member of the ALA Chapter Resource Team (CRT). As you may know, members of the CRT are assigned to work with chapters throughout the year. I have the privilege of working with your chapter this year. I know this is likely a very busy time for you, but I'm wondering if we could chat by phone in the next week or two—just to see how things are going. Why don't you give me a couple days/times that work for you?"

Thinking ahead, I would welcome the opportunity to come visit your chapter to discuss the Chapter Performance Objectives and Presidents' Award of Excellence, which serve as the blueprint for effective chapter management. ALA encourages these yearly visits, with the hope of making things easier for you, as a new chapter president. Usually the chapter pays the cost for these visits, but there may be cost sharing options, depending on your chapter's finances. We can discuss a visit during our first telephone conversation.

I hope you are enjoying your year (so far) as President of the xxxxxx Chapter! There is so much to do, so much to learn, and so little time. Yet, it is such an amazing and wonderful professional and personal experience. Please know I am here to help you in any way I can.

Thank you for serving your chapter and ALA in this important leadership position. I am very much looking forward to working with you.”

**Prior to a Chapter Visit**, send a confirming email to the Chapter President or chapter contact person. Here is a list of information you should confirm:

- ✓ Date of visit
- ✓ Time of meeting
- ✓ Purpose of visit (facilitate board retreat, present ALA Update or educational session, attend a chapter or board meeting) and desired goal
  - It is important to clarify your role. For example, if you are facilitating a board retreat, are you preparing the first draft of the agenda or is the Chapter President?
  - If you are giving an educational session, provide the chapter with a program description
- ✓ Location of meeting (physical address, including room name/number)
- ✓ If giving an ALA Update or educational program, how much time is allocated for the presentation and will there be other speakers?
- ✓ As needed, address technology needs, room set-up, and handouts
  - Microphone (preferred type....podium, lavalier, etc.)
  - Projector
  - Laptop
  - Internet connection
  - White boards
  - Flip charts and markers
  - Copies of handouts
- ✓ Who will be attending and how many? (members, business partners, managing partners)
- ✓ Other events during visit (other meals, office visits, meeting with board)
- ✓ Who will pay for travel expenses? (ALA Headquarters, Chapter or split?)
- ✓ Once estimated expenses are known (air, hotel, ground transportation, meals, etc.), it is best to send a confirming email so there are no surprises
- ✓ Ask for a hotel recommendation (if needed) and restaurant options (if you are dining alone)

Here are some **tips for maximizing the benefits of your chapter visit**:

- ✓ Arrive early and greet members and guests. Be sure to introduce yourself.
- ✓ Make the session or meeting as interactive as possible
- ✓ Congratulate the chapter on their work, and thank the chapter leaders for their dedication to ALA
- ✓ Be flexible with your time and presentation
- ✓ Bring business cards. Pass them out and encourage members to call if they have questions
- ✓ Be on the lookout for future ALA leaders; let them know how ALA leadership has benefited you
- ✓ Know that you are not alone if you are feeling nervous about the chapter visit. Talk to other ALA leaders—they will have tips to share.
- ✓ If you do not feel comfortable with the requested purpose of the visit or presentation topic, suggest that another member of the leadership team visit the chapter or join you on the trip
- ✓ Have fun!

If the chapter would like you to give an ALA update or other ALA presentation, there are [a few PowerPoint presentations available on the ALA website](#), including:

- ✓ ALA Update PowerPoint with talking points (Chapter Visit presentation)
- ✓ CLM Certification

### **Presentation Tips:**

- ✓ Know your audience (members only, business partners, managing partners?)
- ✓ Know your topic inside and out
- ✓ Don't only focus on the main part of your presentation; give a compelling opening and a convincing conclusion
- ✓ Practice, practice, practice ... and then practice some more
- ✓ Add interest with quotes, humor, and personal stories
- ✓ Handouts should match your presentation and enhance your presentation; add checklists and additional suggested reading list, if appropriate
- ✓ Do not read from your slides
- ✓ While delivering your presentation -
  - Relax and smile
  - Slow down and breathe
  - Be confident
  - Do not apologize
  - Watch your time
  - Avoid "ummms," "aahs," and filler words
- ✓ Prepare for questions; if you don't know the answer, say so

### **Facilitation Tips:**

In addition to giving presentations, you may be asked to facilitate a board or leadership retreat. These types of events require an understanding of facilitation skills. Below are some tips for maximizing your effectiveness in facilitating these meetings.

- ✓ Understand the purpose of the facilitation (stimulate thinking, change a process, make decisions, share information/educate)
  - Inform participants of your role, so there is no misunderstanding
- ✓ Agree on desired outcome(s)
- ✓ Start and end on time
- ✓ Agree on Facilitation "Rules" for everyone (i.e., listen actively, keep comments brief, don't rehash something that has already been said, be candid, ask for clarification, no side conversations, be positive)
- ✓ Be flexible
- ✓ Do not judge; do not take negative behaviors personally
- ✓ Keep discussion moving and on track—interrupt when necessary
- ✓ When necessary, summarize participant's viewpoint to avoid misunderstanding
- ✓ Call on people "out of turn"
- ✓ Don't dominate conversations
- ✓ Bring items to a conclusion and outline future actions

### **After your visit:**

- ✓ Send a thank you note to the chapter
- ✓ Send any follow-up information, if needed
- ✓ Enter your visit on the [ALA Chapter Visit Database](#)