



Chapter Visit Toolkit

As an ALA leader, visiting another chapter is a unique and awesome opportunity! Leaders can optimize being an ALA ambassador *and* spend time connecting with a chapter—a win-win! The keys to a successful chapter visit are:

- Create a dialogue with the chapter representative(s),
- Learn about the successes and challenges of the chapter,
- Understand the expectations for the chapter visit and
- Craft a plan to ensure those are fulfilled.

ALA Headquarters and your fellow leaders are a great resource for completing a successful chapter visit. Please use this toolkit as reference when navigating chapter visits.

Chapter Visit Policy

All requests for chapter visits and presentations to be conducted by a member of ALA's Board of Directors or an ALA volunteer group must be submitted using the [chapter visit request form](#). All submissions will be assigned by the Executive Committee based on target audience, desired topic and meeting format (virtual or in-person) as well as volunteer availability and location according to this chart:

Target Audience	Topic	Format	Assigned Volunteer	Assigned Observer
Chapter Leaders	Chapter Operations	Virtual	CCC	BOD
Chapter Leaders	Chapter Operations	In-Person	CCC or BOD w/1 or more year experience	N/A
Chapter Membership	Benefits of ALA Membership	Virtual	BOD <u>w/1 or more year experience</u>	CCC



Chapter Membership	Benefits of ALA Membership	In-Person	BOD w/1 or more year experience*	N/A
Chapter Leaders or Membership	Association Matters	Virtual or In-Person	BOD w/1 or more year experience	N/A
Chapter Membership	Law Firm Management	Virtual or In-Person	N/A – These requests will be referred to the assigned CCC liaison to connect the chapter with the appropriate resource	

**Requests for individuals serving in specific roles (President, Executive Director, etc.) will be taken into consideration.*

The Executive Committee will post all visit opportunities on the appropriate discussion forum and has discretion in considering unique factors or circumstances for all requests. Responses will be required in no less than 48 hours.

ALA does have a pool of funds set aside for those chapters needing assistance in funding an in-person visit. ALA will only fund one in-person visit per chapter per year with a cap of \$1500 per visit. Additional *chapter-funded* visits may occur as deemed appropriate.

Volunteer leaders are to provide a written report outlining their visit experience to the CCC Chair and the assigned staff liaison within 10 business days of the visit.

Only requests received from current ALA members will be pursued. Requests from other individuals or entities will be routed to the appropriate department at ALA headquarters to be managed.

Confirming the Visit

Once the request is received from ALA Headquarters, details of the visit and any specific requests will be shared with the chair of the CCC and the Board Liaison to the CCC within 2-3 business days. ALA Headquarters will provide an update to the chapter regarding their visit within 5-7 business days if a visitor cannot be confirmed by then. If an alternative date is needed or other details need clarification surrounding the visit, ALA staff will include that in the update to the chapter within that window.

If a chapter visit cannot be confirmed within 14 business days of the request, other options to fulfill the request will be considered.



Once a leader is identified and confirmed for the visit, ALA staff will input the visit into the [chapter visit database](#).

Prior to the Visit

Once the leader conducting the visit is confirmed, ALA Headquarters will send communication confirming the details of the visit and connecting the chapter with the assigned visitor. Details in the message may include the purpose, audience, date, time and location of the visit. ALA Headquarters will confirm the financial details of the visit (if any) and share that appropriately so travel arrangements can be made in a timely manner.

If any of the non-financial aspects of the visit are not finalized upon confirmation, the ALA leader will need to confirm those details as part of their dialogue with the chapter. ALA staff can assist with this as well.

It is important to get to know the chapter prior to your visit. Once the confirmation has been sent, it is recommended that the ALA leader scheduled to visit the chapter conduct a prep call with the chapter representative(s) to discuss the current status of the chapter. In addition to directly communicating with the chapter, please reach out to the CCC liaison for any helpful information regarding the visit; you may also consider including the liaison on a prep call.

Depending on the nature of the visit, consider reading the latest Chapter Profile form (send a request to chapters@alanet.org to receive the profile), review the chapter's website and social media, learn about the chapter's business partner program, study the chapter's leadership roster (found on the alanet.org website), and reach out to ALA Headquarters for any other information you think would be helpful in gaining an understanding and connection with the chapter.

Regardless of the main purpose of the chapter visit, please bring along a copy of 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.

Encouraging Visits

As ALA leaders, opportunities to connect with other members present themselves frequently. Encouraging chapter visits is one way to promote strengthening the relationship between ALA International and ALA Chapters. It is also an impactful show of support towards the chapter. Share with the chapter members reasons to request a visit. They can include:



- Education on the benefits of ALA and/or the CLM program
- To assist in celebrating a special milestone or an event for the chapter (anniversary, passing of the gavel, retreats, etc.)
- Inspire and encourage new chapter leaders
- Promote active participation and engagement with chapter members.

If cost appears to be a prohibitive factor, please share with chapter members that ALA can provide funding assistance for chapter visits.

During the Visit

Pro tips to maximize the benefits of your chapter visit:

- Arrive early and introduce yourself to members and guests.
- 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

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, please let a member of the Executive Committee, the CCC chair, or ALA staff know. We are all available to help!

If the chapter would like you to give an ALA update or a presentation on the CLM these presentations are available on the ALA website and are updated semi-annually. If you cannot find them, please reach out to ALA staff.

Presentation Pro Tips:

- Know your audience (members only, board only, business partners, prospective members?)
- Know your purpose and topic
- Practice, practice, practice ... and then practice some more
- Add interest using quotes, humor, and personal stories



- Handouts, if used, should enhance your presentation
- Do not read from your slides
- While delivering your presentation: breathe, relax, smile and try to breathe again!
- Beware of your time
- Prepare for questions; if you don't know the answer, say so

Facilitation Pro 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. Consider the following for maximizing your effectiveness in facilitating these events:

- 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
- Be aware of time
- Agree on desired outcome(s)
- Establish 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

- Update your visit information in the chapter visit database with any relevant notes or changes to the visit that may have occurred (i.e. in-person changed to virtual, date change, etc.)



- Send a thank you note to the chapter
- Provide a written report of the visit to the CCC chair and the assigned staff liaison
- Send any follow-up information to the chapter, if needed or requested