Chapter Success Book

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Chapters Liaison 2019-2021


Section 1: About ARLIS/NA


Chapters must follow the policies of ARLIS/NA and chapter bylaws must work in concert with the society's bylaws.

1.2. **ARLIS/NA Bylaws**

1.3. **ARLIS/NA Policy Manual**

1.3.1. **See Policy Manual, Section D: Chapters**

1.4 **ARLIS/NA Headquarters**

McKenna Management, Inc. (McKenna Management) serves as the association management company for ARLIS/NA. McKenna Management is commonly referred to as headquarters.
Section 2: About ARLIS/NA Chapters

2.1. List of Chapters

2.2. Chapter Affiliation Agreement

2.3. Chapter Leaders Basecamp

Inter-chapter communication and documents related to chapter management and may be found in the chapter leaders Basecamp account. The chapters liaison will add and delete officers, elected and appointed, according to their terms.

2.4. ARLIS/NA Procedures for the Dissolution of a Chapter

The suspension or dissolution of a chapter are actions taken voluntarily by that chapter's membership or by decision of the executive board due to the chapter's inactivity.

Procedure:

1. Determination of inactive status:

A chapter is considered to be inactive when it has not held meetings for one year and no one from the chapter responds to two communication attempts from the executive board liaison or other board members, or lacks a contact person for one year.

2. Declaration of inactive status:

The executive board shall declare a chapter to be inactive. The decision of the executive board and the specified inactive time period shall be documented by the board liaison and recorded in the minutes of the ARLIS/NA Secretary.

3. Cessation of Inactive Status:

The inactive status will be removed when the chapter resumes its prescribed activities and notifies the executive board accordingly.

4. Dissolution of a chapter:

If the chapter's activities are not resumed within the prescribed time period, the executive board may dissolve the chapter. This action shall be documented by the chapter's executive board liaison and recorded in the minutes of the ARLIS/NA Secretary.

Section 3: Reporting & Communicating

3.1. Midyear Report

Chapter chairs/presidents will submit a midyear report to the chapters liaison during the summer.
• Exact date depends on when the ARLIS/NA Midyear Executive Board Meeting is held.
• Chapters liaison will provide a template.
• The midyear report summarizes activities and communicates any challenges.

3.2. Annual Report

Chapter chairs/presidents will submit an annual report to the chapters liaison during the winter. There are two different annual report templates. Chapters use the Constituent Group Report Template. Annual reports are found on the ARLIS/NA website.

• Exact date depends on when the ARLIS/NA Annual Conference is held.
• Chapters liaison will provide a template.
• Include the following:
  o Name of chapter, period covered, and identity of the reporter
  o List of chapter officers and their roles
  o List of chapter meetings; indicate date, location, number of attendees, brief synopsis of meeting, programs, guest speakers, etc.
  o List of other activities
  o Membership statistics by categories
  o Treasurer’s report, which includes income, balance, expenses, and funding streams (May be appended or included in the body of the report)

3.3. Minutes

Minutes should be sent to the chapters liaison in a timely fashion. In the event that minutes will not be approved for a significant time, an unapproved draft should be sent. The secretary should indicate that they are awaiting formal approval by members.

3.4. Communication with ARLIS/NA and Headquarters

The chapters liaison is the chapter’s first line of personal contact with the ARLIS/NA Executive Board and Headquarters (HQ). The liaison should be informed of or receive information about:

• Chapter meetings
• Chapter activities and projects
• Issues needing to be addressed by the ARLIS/NA Executive Board
• Announcements and newsletters
• Minutes
• Copies of requests for special funding
• Offers to host annual conferences
• Edits to the ARLIS/NA website (AWS)
• Requests for services from headquarters
  o Technical support
3.5. Communication with Chapter Membership

Chapters may request an ARLIS/NA-hosted website, listserv, or project management tool via the chapters liaison.

3.6. External Communication

Any time a chapter member or officer wishes to speak verbally or in writing as an official representative of the society, the content of that communication must be cleared in advance with the ARLIS/NA Executive Board, though the chapters liaison.

3.6.1. Press Releases

Chapters wishing to issue a press release should send text to the editorial board, via the chapters liaison.

3.6.2. Advocacy Statements

Advocacy and public policy statements must also align with the ARLIS/NA Advocacy Policy.

3.6.3. Donation Solicitations

Chapters must notify the development committee chair before soliciting donations from a potential donor outside membership.

3.7. Communication Guidelines

3.8. Style Guidelines

Section 4: Chapter Governance

4.1. Administrative Documents & Tools

4.2. Chapter Bylaws

Each chapter operates by its own bylaws. Revision of those bylaws must be formally reviewed and approved by the ARLIS/NA Executive Board. Submit any proposed changes in chapter bylaws to the chapters liaison for board approval. No bylaws changes will be in effect before final approval by the ARLIS/NA Executive Board.

4.3 Officer Onboarding
See Addendum A for the Officer Onboarding Checklist, which includes requirements for each chapter leadership role.

Section 5: Chapter Management

5.1 Meetings

Chapter bylaws will dictate the number of meetings held during a term, typically at least twice a term. Meeting agendas are determined by the chair/president. Decisions about registration fees, locations, and ancillary activities are determined by the chair/president, the chapter's executive committee, or members appointed by the chair/president.

It is strongly recommended that the meeting follow Robert's Rules of Order Parliamentary Procedure.

Minutes from business meetings should be recorded and archived. They should also be distributed to the entire membership and the chapters liaison.

5.1.1 Land Acknowledgements

The ARLIS/NA Policy Manual offers recommendations on land acknowledgements for chapter meetings. Please see policy number N-9.

5.2 Insurance and Liability

As of June 1, 2015 all chapters are covered under ARLIS/NA general liability insurance.

ARLIS/NA insurance also covers chapter meetings in Canada, the U.S., and Puerto Rico. Meetings in Mexico, the U.S. Virgin Islands, or outside ARLIS/NA territory require additional coverage.

A Certificate of Insurance is available upon request. A request form may be found in the chapter leaders Basecamp account.

COMMERCIAL GENERAL LIABILITY LIMITS

- $2,000,000 General Aggregate (Other than Products/Completed Operations)
- $2,000,000 Products/Completed Operations Aggregate
- $1,000,000 Personal and Advertising Injury Liability
- $1,000,000 Each Occurrence
- $300,000 Fire Damage (any one fire)
- $10,000 Medical Payments (any one person)

Coverage includes, but is not limited to:

- Host Liquor Club & Chapter Activity
• Meeting/Convention Liability (up to 10,000 attendees)
• Volunteers as Additional Insureds
• Temporary Landlords as Additional Insureds

Coverage excludes, but is not limited to:

• Fireworks
• Musical Concerts
• Mechanically Operated Amusement Devices
• Auto/Motorcycle Activities
• Animal Related Activities
• Biking Events Sports/Athletic Events
• Aircraft & Balloons (incl. balloon rides)
• Bungee Jumping
• Watercraft & Water-Related Events
• Nuclear Energy and War
• Professional Liability Exposures
• Workers’ Compensation
• Automobile Liability or Physical Damage
• Employment Related Practices

General liability insurance is intended to respond to covered perils surrounding allegations of bodily injury or property damage to a third party, such as an invited guest, or general public; and that such injury/damage is due to the negligence of the organization. Injuries to or property damage to items belonging to employees, volunteers, or members of the organization or chapter are not covered. General liability insures other people against actions by ARLIS/NA employees, members, or volunteers who are working at the direction of an ARLIS/NA leader and on ARLIS/NA’s behalf. This policy will not respond to suits brought against one member by another. This policy is not and is never intended to be an accident or medical insurance policy for members.

Notes:

1. Chapters must be scheduled on the policy to be covered. A Chapter Liability Exclusion will remain on the policy to exclude any chapters not scheduled.
2. The limit of liability is shared by all chapters and headquarters.
3. Medical expense coverage can extend to a volunteer who is working at your direction and on behalf of your organization, but only up to $10,000. This coverage is not intended to replace medical or accident insurance.
4. Certificates of Insurance should be obtained from vendors and anyone providing services, including caterers, bus charters, contractors and professional service providers.
5. No real or personal property coverage is provided under a general liability policy.

5.3 Project Charters
Project charters should be submitted when embarking on a project or requesting funds for a project. The text on project charters is used to promote projects on the AWS and other communication platforms.

5.3.1 **Project Charter Workflow**

5.4 **Technology**

Headquarters supplies chapters with access to technology support on its Technology Matrix.

5.4.1 Request technology using the Information Technology Request Form, which may be found under forms on the Administrative Documents & Tools page after logging into the AWS.

5.5 **ARLIS/NA Archives at the University of Illinois, Urbana-Champaign**

5.5.1 **Guidelines & Procedures for submitting chapter papers to the ARLIS/NA Archives**

5.5.2 Affiliated and Associated Organizations ARLIS/NA Chapters with papers at UIUC:

- Midstates Chapter File, 1974-1994 85/57/1
- Delaware Valley Chapter File, 1970-2012 85/57/16
- Central Plains Chapter File, 1973-1994 85/57/2
- Ohio Chapter File, 1976-1988 85/57/3
- Western New York Chapter File, 1978-2011 85/57/4
- Southeast Chapter File, 1999-2015 85/57/5

5.6 **Digital Archiving**

Columbia University crawls arlisna.org semiannually at default full-host depth, with a scope expansion to accept any URL with string arlisna. This is capturing most pages on most chapter sites.

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**Section 6: Chapter Finances**

6.1 **Special Funding Requests**

6.2 **Taxes**

U.S.-based chapters, including the bi-national Northwest Chapter and Texas-Mexico Chapter, are subject to U.S. tax requirements. Each chapter is its own individual legal entity and has its own Tax Identification Number (TIN), which is separate from that of ARLIS/NA. Many of the original
TIN’s may be found within the financial info folder in the chapter leaders Basecamp site.

Each chapter should file the 990-N form online using its name and number. Chapter tax years run from October 1st – September 30th and 990-N forms are due on February 15th. It is imperative that taxes are filed yearly so the chapter does not lose their non-profit tax status.

Once the 990-N has been filed, the person filing for the chapter will receive proof of acceptance. This proof should be sent to the Chapter Liaison.

6.3 Banking

When a new treasurer is elected, both the old and the new treasurer will need to meet at the bank in person to transfer the account. This security measure, while inconvenient for chapters that span larger geographic regions, is required by law. It is recommended that you call the bank prior to your arrival and get a list of the documentation required to make the transfer. Making an appointment with a banker is also helpful. Every bank is different but documents required of chapters in the past have included: drivers’ license and secondary ID for both parties, meeting minutes that record the election of the new treasurer, chapter bylaws, copy of the IRS tax-exempt notice showing EIN, URL of chapter website, and recent utility bill to confirm the street address of the new treasurer. Calling the bank beforehand to learn what is required and scheduling an appointment can save a lot of hassle in the long run.

Another option is to close the original bank account entirely and open a new one.

6.4 EIN Letters

If your chapter needs a copy of your original EIN letter, call the IRS at 1-800-829-5500. A chapter officer will need to make the call. Ask for a 147C letter.

6.5 PayPal

Some chapters use PayPal. When a new treasurer is elected, you will need to change the name associated with the Chapter's PayPal account. PayPal accounts can be registered under the Chapter's EIN.

Here’s how to change the contact name of a PayPal account:

1. Go to your Account owner information page on a web browser.
2. Click Change beside 'Name'.
3. Select 'Your contact name has changed' and click Continue. You'll see a list of the supporting documents we need to change the contact name.
4. Once you have the documents ready, click Upload Documents to send them to us.

Please provide clear, valid documents so PayPal can quickly make the changes. PayPal will review the documents and get back to you within 3-5 business days.

As of June 2020, the documents PayPal required are:

1. Photo ID
a. You can use your driver’s license, passport, or any other government issued photo ID.

2. Document on your business letterhead
   a. Include the primary email address, current name, address, and phone number on the PayPal account.

3. New business contact’s SSN
   a. Provide a copy of the Social Security card or a pay stub that shows the SSN.

Here is some sample text to use for the document on your business letterhead (#2 above):

Dear PayPal,

On [date], [new treasurer name] began her two-year term as Secretary and Treasurer of the Art Libraries Society of North America—[Chapter Name]. I, [former treasurer/PayPal contact], former treasurer, have relinquished my rights to the ARLIS/NA-[Chapter Name] PayPal account and leave [new treasurer] as the main contact of this non-profit business account.

Primary account email address: _______
Current name: __________
Current address and phone: _________
New business contact name: ___________

Sincerely,

[Insert Signature]
Typed name
[Insert image of photo ID]

6.6 Awards

Travel awards over $599 are taxable income and need to be accompanied by a 1099 form. To avoid this...

Option One:
The cumulative amount received in a calendar year is what counts. Treasurers may, therefore, split travel awards into two pay-outs — one issued before the end of one year and one issued at the beginning of the next, so that the award recipient will not have to list it as taxable income.

Option Two:
If the award winner submits receipts for any expenses incurred at or for conference to the treasurer, the award can legally become a reimbursement. Only the balance left after the receipts are tallied will count with the I.R.S. If that amount is $599 or less, it is not taxable income.

6.5 Development
Section 7: Chapter Membership

7.1 Eligibility

All chapter bylaws must require that membership in ARLIS/NA be required for such chapter members to have the rights and benefits of ARLIS/NA membership, which include, among others, voting, serving on any committee or holding office in ARLIS/NA and at the chapter level, members’ rates for conference registration, and subscriptions to Art Documentation. ARLIS/NA members may join as many chapters as they wish and need not reside within a chapter's boundary.

7.2 Other Membership Categories

Chapters may establish other membership categories, such as student, retiree, or friend, that do not require ARLIS/NA membership. Such non-ARLIS/NA membership categories do not entitle such chapter members to the rights and benefits of ARLIS/NA membership, but can accommodate participation by non-ARLIS/NA members in chapter events. While the goal of the society is to encourage membership in both ARLIS/NA and the local chapter, these categories gives non-members of the society access to the newsletters and meetings of the chapter as a non-voting attendee. It does not give them any of the other benefits of ARLIS/NA membership—voting, members’ rates for conference registration, subscriptions to Art Documentation, nor does it allow them to serve on any committee or hold office in ARLIS/NA or at the chapter level.

7.3 Bundled Membership

Bundled membership is offered by ARLIS/NA as a convenience for chapters. When individuals join the society, they have the option of also joining a chapter of their choice. Chapters retain the right to collect dues for any membership category directly. Dues collected by bundled membership are distributed by headquarters to the chapter treasurer.

Bundled Membership FAQ

7.4 Recruitment

Successful recruitment of new members happens in three phases:

- Identifying potential new members
- Introducing them to the society
- Persuading them to join the chapter and the society

Local contacts are the richest source of new members. Colleagues in libraries of all types, visual resources collections, museum documentation departments, historical societies, picture research firms, architectural firms, library schools, commercial art galleries, art appraisers, those working with image-based digital collections, and publishers may be attracted to chapter programs and publications.
Chapter meetings with interesting programs and opportunities for networking are popular ways to introduce ARLIS/NA to a new audience. Many chapters keep a list of dues-paying members as well as a broader list of regional institutions and occasional past attendees. In chapters covering a large area, meeting attendance may draw from a new local audience each time the location of the meeting changes. Meeting flyers are sent to those names on the larger list in hopes of coming to the attention of a new pool of potential members.

Joining the society has many benefits. The opportunity to meet with professional colleagues is important at all levels. Chapter meetings provide current awareness, introduce important regional cultural resources, and, via the business meeting, display an avenue for contribution to the visual arts professions. In addition, good opportunities for exchange of information take place during associated lunches, dinners before and after, and even coffee breaks. Chapters should maximize networking occasions whenever possible as an inducement to society membership.

Chapters may consult with the membership committee to identify potential chapter members in their area. ARLIS/NA members who have not joined their chapter may be identified by logging into the AWS and searching the Membership Directory by state or province.

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### Section 8: Schedule

**January**

1. Chapters liaison will conduct an orientation call with the new chair/president to enumerate pertinent policies, communicate responsibilities, and discuss chapter business.

**Spring**

1. Chapter chairs/presidents in attendance will attend the chapter leaders meeting at the annual conference.
2. Chapters may hold a meeting at the annual conference.
3. Treasurers in U.S.-based chapters will submit a 990-N form to the Internal Revenue Service on or by Tax Day.

**May-July**

1. Chapters planning to submit a Proposal to Host the annual conference should tell the chapters liaison in advance of the ARLIS/NA Midyear Executive Board Meeting.
2. Chapters should submit any Annual Funding Requests in advance of the ARLIS/NA Midyear Executive Board Meeting.
3. Chapter chairs/presidents will submit a Midyear Report in advance of the ARLIS/NA Midyear Executive Board Meeting.

**December-January**

1. Chapters may submit a Proposal to Host the annual conference in advance of the January executive board meeting.
Winter

1. Chapters must conduct an election and report the results to the chapters liaison.
2. Chapter chairs/presidents must submit an Annual Report in advance of the annual conference.

As appropriate

1. Chapters may submit Immediate Funding Requests, as needed.
2. Chapters should meet, as determined by chapter bylaws and as needed.
Addendum A: Officer Onboarding Checklist

Checklist for All Departing Officers

✓ Schedule an entrance interview with incoming replacement to discuss tasks and expectations.
✓ Detail all ongoing projects; provide background and context.
✓ Deliver all passwords, including those for the following.
  ✓ Blogs
  ✓ Social media
  ✓ Flickr
  ✓ Website administration
✓ Give replacement files, papers, and electronic documents they will need to take over.
✓ Submit documents of lasting value to the chapter archive or the ARLIS/NA archive at the University of Illinois, Urbana-Champaign.
✓ Chairs/presidents should notify chapters liaison of election and appointment results within 30 days of selection.
Checklist for All Incoming Officers
✓ Once the chapters liaison adds you to the chapter leaders project in Basecamp, familiarize yourself with the information and communications stored there.
✓ Read chapter bylaws.
✓ Read Chapter Success Book
✓ Read policies on chapter management in the Policy Manual, in particular Policy C.3.C and Section D.
✓ Read Technology Matrix and request society-hosted technology through the chapters liaison, as needed ([https://arlisna.org/images/admindocs/planning/ARLISNA_Technology_Matrix_20210310.pdf](https://arlisna.org/images/admindocs/planning/ARLISNA_Technology_Matrix_20210310.pdf)).
✓ Scan Administrative Documents and Tools for other information pertinent to your chapter role ([https://arlisna.org/organization/administrative-documents](https://arlisna.org/organization/administrative-documents)).
✓ Important things to know:
  ✓ ARLIS/NA contracts with McKenna Management, a management company based in Massachusetts. McKenna Management provides technology and personnel support. ARLIS/NA's Executive Director, currently Cambria Happ, MPA, CAE, is actually an employee of McKenna Management. Our contract with McKenna Management covers a finite number of service hours worked by headquarters staff.
  ✓ Questions for the executive board or McKenna Management employees should be submitted to the chapters liaison, in order to ensure that we do not exceed our contract hours with McKenna Management.
  ✓ ARLIS/NA’s insurance policy covers liability at chapter meetings in Canada, Puerto Rico, and the U.S. Chapter meetings that take place in Mexico and the U.S. Virgin Islands will require additional coverage.
  ✓ A list of tax exemption numbers for each chapter, as well as ARLIS/NA may be found in the financial info folder in the Basecamp account.
  ✓ Because ARLIS/NA headquarters is based in the U.S. all chapters have non-profit status in the U.S. and its territories. The chapter's EIN (or TIN during tax season) should, therefore, be sufficient to set up bank accounts and accounts with financial transaction companies like PayPal. If a bank or company refuses to accept the chapter's non-profit status, contact the chapters liaison.
  ✓ Because headquarters is based in the U.S., chapters do not have non-profit status in Canada or Mexico, nor are they incorporated. (I [Catherine Essinger, Chapters Liaison 2017-2019](#) find it helpful to think of chapters as having the same legal status of a professional club in these countries.) When this lack of legal status poses a problem, chapter leaders should contact the Canadian liaison and/or chapters liaison for guidance.
Checklist for Incoming Chairs/Presidents and Vice Chairs/Vice Presidents

✓ Read Policy A.5 on annual reports in the Policy Manual
✓ Read Policy G.17 on development in the Policy Manual
✓ Read the Chapter Affiliation Agreement in the about chapters folder in Basecamp.
✓ Read the fundraising folder in Basecamp.
✓ Read the insurance/liability folder in Basecamp.
✓ Read guidelines for special funding requests in Basecamp (funding requests folder).
✓ Important things to know:
  ✓ Executive board must formally approve changes to chapter bylaws, which may take place during any monthly executive board meeting.
  ✓ Chairs/presidents must submit an annual report to the chapters liaison 30 days prior to the annual conference.
  ✓ You are encouraged to produce a midyear report in the summer, which is less formal than the annual report, but helpful in keeping the executive board abreast of chapter developments.
  ✓ The chapters liaison will solicit news from chapters every month for their monthly reports. This should include information about chapter events, programs, problems, and elections.
  ✓ If a chapter member or officer wishes to issue a press release on behalf of the chapter, the chapters liaison must get approval from the ARLIS/NA Editorial Board.
✓ McKenna Management, Inc. (McKenna Management) serves as the association management company (AMC) for ARLIS/NA under the provisions of ARLIS/NA Bylaws Article X. McKenna Management, more commonly called ARLIS/NA Headquarters, provides the following services to ARLIS/NA: general office support (physical address, telephone, and storage), publications and graphic design, membership processing, customer care, financial services, information technology services, advertising and sponsorship services, and conference management. The ARLIS/NA Executive Director is employed by McKenna Management and coordinates these services, working directly with the executive board, of which she or he is an ex-officio member.
✓ In some cases, the executive director will work directly with chapter officers, but typically questions for anyone in headquarters should be funneled through the chapters liaison or the Canadian liaison.
Checklist for Secretary Duties

Outgoing

 ✓ Deliver a list of unfinished action items and motions from past year, so the new secretary knows what to track.

Incoming

 ✓ Become conversant with Robert’s Rules of Order.
 ✓ Review information for chair duties.
 ✓ Important things to know:
   ✓ Submit drafts of meeting minutes to the chapters liaison. This is done to facilitate communication between the chapter and the executive board, so drafts may be sent before they are formally approved.

Checklist for Treasurer Duties

Outgoing

 ✓ Change contact name and information on bank account, or close the account and deliver chapter funds to the new treasurer.
 ✓ Close or transfer administration of accounts with online payment systems.

Incoming

 ✓ Open new bank account, if necessary.
 ✓ Open new online payment system account, if necessary.
 ✓ Read Policy J.13 on tax status in the Policy Manual
 ✓ Submit e-postcard to IRS before Feb 15, if in the U.S.
 ✓ Read the financial info folder in Basecamp.
 ✓ Read guidelines for special funding requests in Basecamp (funding requests folder).
Checklist for Website Editing Duties
✓ Read Section H on editorial policies in the Policy Manual
✓ Read the technology folder in Basecamp.
✓ Read and comply with Communication Guidelines:
✓ Read and, where appropriate, follow the Style Guidelines:

Checklist for Listserv Moderator Duties
Outgoing
✓ If listserv is hosted by the moderator's home institution, transfer the listserv to a new host.
✓ If listserv is hosted by ARLIS/NA, notify chapters liaison, who will instruct McKenna Management to update contact information.
✓ If hosting is transferred, determine what messages can and should be archived.

Incoming
✓ Read "Chapters with L-soft listserv hosted by ARLIS/NA" document in the communications folder in Basecamp.

Checklist for Communication Coordinator Duties
✓ Read Section H on editorial policies in the Policy Manual
✓ Read and comply with Communication Guidelines
✓ Read and, where appropriate, follow the Style Guidelines
✓ Subscribe to ARLIS-L and post important news there.
✓ Check the communication folder in Basecamp for additional documents and guidelines.
✓ Important things to know:
  ✓ You are encouraged to submit news items to chapters liaison for monthly reports to the executive board.
  ✓ If a chapter member or officer wishes to issue a press release on behalf of the chapter, the chapters liaison must get approval from the ARLIS/NA Editorial Board.
**Checklist for Development Duties**

- ✓ Read Policies G.10 on the development committee and J.10 on financial policies in the [Policy Manual](#).
- ✓ Read the fundraising folder in Basecamp.
- ✓ Read the ARLIS/NA Code of Ethical Standards for Fundraising Activities Agreement [pdf].

**Checklist for Membership Coordinator Duties**

**Departing Coordinator**

- ✓ Deliver current and historic membership rosters to new coordinator.

**Incoming Coordinator**

- ✓ Important things to know:
  - ✓ You may identify potential chapter members by logging in to arlisna.org and searching chapter states in the directory (https://arlisna.org/membership/directory), to check against current roster.
  - ✓ Chapters may establish a non-ARLIS/NA chapter membership category titled “friends” and such membership category does not entitle such chapter members to the rights and benefits of ARLIS/NA membership. The “friends” category can accommodate participation by non-ARLIS/NA members in chapter events. While the goal of the society is to encourage membership in both ARLIS/NA and the local chapter, the “friends” category gives non-members of the society access to the newsletters, and meetings of the chapter as a non-voting attendee. It does not give them any of the other benefits of ARLIS/NA membership—voting, members’ rates for conference registration, subscriptions to *Art Documentation*, nor does it allow them to serve on any committee or hold office in ARLIS/NA or at the chapter level.

**Checklist for Mentorship/Student Outreach Duties**

**Outgoing**

- ✓ Deliver contact information for college programs and mentorship pairs.

**Incoming**

- ✓ Review mentorship program information ([https://arlisna.org/career-resources/career-resources/899-mentoring-programs](https://arlisna.org/career-resources/career-resources/899-mentoring-programs)).
- ✓ Contact mentorship sub-committee chair, who will update the contact information for your chapter on the mentoring programs page.
- ✓ Review recommended reading materials on the mentoring program page, as well as the mentoring sub-committee page ([https://arlisna.org/organization/committees/36-professional-development-committee/90-mentoring-subcommittee](https://arlisna.org/organization/committees/36-professional-development-committee/90-mentoring-subcommittee)).
Checklist for Archivist Duties

Outgoing

✓ Deliver guidelines for what documents, email/listserv messages, and other items should be archived.

Incoming

✓ Read archiving folder contents in Basecamp.
Addendum B: Chapter Fundraising Guidelines

ARLIS/NA

Chapter Fundraising Guidelines

Raising funds, whether for your chapter or for one of your personal charities, is really about establishing and maintaining a personal relationship with your donor. I was once told that people who donate funds to support an organization really give to the people they encounter who are involved with the organization. As a representative of your local ARLIS/NA chapter, you get to be that person who can express why the donor should support the chapter and its fund-raising endeavors.

Things you should do

- Be friendly: It may seem a little obvious, but if you are tasked with chapter fundraising, make sure you go and speak with as many chapter members as possible when you gather. They may be your principal donor pool. While this may be a little difficult for someone on the shy side, it is an important tool in internal fundraising, and simply just good manners. Introduce yourself to new members and try and draw them into groups if they are holding back. Speak to members besides your best buddies. For external donor groups, flash that smile and give a firm (but not too!) handshake. As part of your conversations, try to work in the chapter and its needs.

- Be prepared: Many times, a donor may have additional questions about the organization, the specific cause they will be supporting, and what are the long-term goals, etc. You should be prepared to answer them. If you do not know the answer to a question, be honest and say you do not know but that you will find out and get a response to them quickly.

- Acknowledge: After you have had some contact (email, telephone, or in person) send a note – email or phone is fine unless a donation is given (more on that later). The point is to make sure the donor knows that you appreciate the time they took to listen.

- Stay in touch: If your donor has not yet made the contribution or asked for you to get back to them, make sure you stay in contact.

- Do not take it personally: When you ask for a donation many times the response will be “no.” It’s okay! Remain positive and retain in touch regardless. Assess whether a later ask might be prudent. You can even ask when you have been turned down whether the timing was wrong, or whether the donor is simply not interested in the chapter. Sometimes by maintaining a friendly relationship and demonstrating the value of our profession, a donor will change their mind and become a supporter.

- Always contact the development committee & chair to keep them informed of any contact you have with any vendor or organizations that already supports- or could support - ARLIS/NA. Chapter fundraising does not supersede society fundraising. It is bad form to have a chapter contact a donor that has already or will soon be contacted by the development committee or the president of the society. It shows a lack of internal communication. This sends a confusing message.
• When you receive a donation, immediately write an acknowledgement letter that should contain thanks for the donation and include a statement that “ARLIS/NA and its chapters are 510 (c) 3 organization and that your donation is deductible to the full amount allowed by law. You have received no goods or services for this donation.” Copies of the letter and any related correspondence should be retained in the chapter archives.

Things you can do

• Think about the implications of the ask. Nowadays there are sometimes social or political aspects of some donor groups that may not be compatible with the goals of ARLIS/NA. Are there any other aspects of accepting the donation that would form a string our organization may not wish to have?
• Form a list of things your chapter wants to fund – and who might find supporting the idea attractive.
• Work with other chapters: Do you have an idea or product that might also be good to partner with another chapter to achieve?

Things you cannot do

• To restate, chapters should not be fundraising in competition with the society. There will be instances when a local book dealer, foundation, or individual will only be interested in making donations on a local level. This is fine. It does not mean that just because XYZ Bookseller is a local entity that supports the society that the chapter can also ask for a donation. Talk to the development committee chair.
• You cannot commit the chapter or the society to any obligation that would mean an endorsement for a product or goods.

Chapter Fundraising Ideas

In addition to having a place on their website for members to make contributions above their membership, there are other ways to raise funds.

• Social Events: It is a good idea to have a fundraising event the is associated with a local chapter meeting (not at the annual conference). For example, would someone open their home or library for a small reception where you could solicit funds to pay for the chapter’s annual contribution to the conference or the chapter travel award?
• Products: can the chapter – possibly in partnership with another chapter(s) - create an item that it could sell? If it has broad appeal, perhaps it could be added to the ARLIS/NA marketplace. The Mid-Atlantic chapter has a Cafe Press site with products sporting the ARLIS/NA logo that helps support the chapter’s travel award.

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