



ART LIBRARIES SOCIETY of NORTH AMERICA

## Chapter Success Book

**Submitted by:** Andi Back, Chapters Liaison, 2023-2025

This document was compiled by Stephanie C. Sigala and Elizabeth Peck Learned for the Art Libraries Society of North America. Updated in 2002 by Ursula Kolmstetter and Laurie Whitehill Chong. Edited by Carol Graney, 2005. Updated by Jonathan Franklin and Peggy Keeran, 2006. Updated by Cate Cooney and Elizabeth Schaub, 2008. Updated by Laurel Bliss, 2012. Edited by Catherine Essinger, 2019. Updated by Stefanie Hilles, 2021. Updated by Stephanie Grimm and Gabrielle Webster, 2022. Revised by Andi Back, 2025.

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### Section 1: About ARLIS/NA

#### ***1.1. Art Libraries Society of North America: History, Mission, and Policies***

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*** (Administrative Documents: Members Only)

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

#### ***1.4. ARLIS/NA Headquarters***

Barcami Lane, Inc. serves as the association management company for ARLIS/NA. Barcami Lane is commonly referred to as headquarters (HQ).

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### Section 2: About ARLIS/NA Chapters

#### ***2.1. List of Chapters***

#### ***2.2. Chapter Affiliation Agreement*** (Administrative Documents: Public)

### ***2.3. 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.

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## **Section 3: Reporting & Communicating**

### ***3.1. Goal-Setting Report***

Chapter chairs/presidents will submit a [goal-setting](#) report to the chapters liaison by May 31.

- See the [Report & Proposal Guidelines](#) for instructions and a link to the form. Please note that the deadlines on this page do not apply to chapters.
- The goal-setting report allows the society to consider what we want to accomplish and ensure that our work is aligned with our strategic plan. Use the goal-setting process to think about your group's charge and mission and to plan activities and initiatives for the coming year(s).

### ***3.2. Annual Report***

Chapter chairs/presidents will submit an [annual report](#) to the chapters liaison by December 31<sup>st</sup> of the calendar year (may need assistance of the chapter's immediate Past President). There are two different annual report templates. Chapters use the Constituent Group Report Template. [Past annual reports are found on the ARLIS/NA website.](#)

- Submit the report to the chapters liaison by December 31.
- See the [Report & Proposal Guidelines](#) for instructions and a link to the form. Please note that the deadlines on this page do not apply to chapters. Beginning sometime in 2025
- Include the following:
  - Name of chapter, period covered, and identity of the reporter
  - List of chapter officers and their roles
  - List of chapter meetings; indicate date, location, number of attendees, brief synopsis of meeting, programs, guest speakers, etc.
  - List of other activities
  - Membership statistics by categories
  - 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:

- Questions or issues that need to be raised to the Executive Board
- Announcements and newsletters
- Updates on chapter activities or projects
- Chapter meeting schedules, agendas & minutes
- Bylaws questions or revisions
- Elections & voting news and officer updates
- [Special funding requests](#) (share a copy of your request after submission)

Headquarters (HQ) provides services for chapters and other constituent groups. Chapters should contact HQ directly for:

- Chapter membership roster, renewal, or billing questions.
- Items for the ARLIS/NA calendar, including meeting announcements (via the [IT Request Form](#)).
- Requests for edits to the ARLIS/NA Website, including chapter officer contact information (via the [IT Request Form](#)).
- Possible assistance with shipping materials to the ARLIS/NA archive at the University of Illinois, Urbana-Champaign. Consider filling out a [special funding request](#) to cover shipping costs.

Major/substantive questions, concerns, or requests for HQ support beyond the current scope of services should be submitted to the Chapters Liaison for consideration and discussion with appropriate parties.

### **3.5. Communication with Chapter Membership**

Chapters may request an ARLIS/NA Commons hosted website [IT Request Form](#). The executive board and HQ are exploring options for listserv and project management tools for chapters. More information will come late 2025. For now, communication amongst chapter members is to be determined by each chapter.

### **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, through the chapters liaison. Refer to the ARLIS/NA Policy Manual for further guidance on external communications.

#### **3.6.1. Press Releases**

Chapters wishing to issue a press release should send text to the editorial board, via the chapters liaison. Refer to the ARLIS/NA Policy Manual for further guidance on external communications.

#### **3.6.2. Advocacy Statements**

Advocacy and public policy statements must also align with the [ARLIS/NA Advocacy Policy](#). Refer to the ARLIS/NA Policy Manual for further guidance on external communications.

#### **3.6.3. Donation Solicitations**

Chapters must notify the [Development Committee Chair](#) before soliciting donations from a potential donor outside your chapter membership. Refer to the ARLIS/NA Policy Manual for further guidance on external communications.

#### **Procedure**

1. After you have developed a list of companies/institutions that the chapter would like to ask for donations, send the list to [development@arlisna.org](mailto:development@arlisna.org) and include your chapter, the date of your event and the amount (or range) you are asking for.
2. The Development Committee will confirm whether it's okay to approach the proposed donors. (They will look at how frequently each donor has been solicited.)
3. Once potential donors are confirmed, you are free to write to them adapting the example provided in the addendum F.
  - a) Adjust the solicitation to fit your needs, and your relationship with the vendor.
  - b) When writing to potential donors, you must include the following text if the prospective donor already gives to ARLIS/NA: "We understand that you donate to ARLIS/NA, and this is a separate solicitation to support the chapter for this one event."
  - c) Acknowledging donors publicly for their donation, may be an incentive for them to donate. You may offer to thank donors on ARLIS-L, a chapter listserv, at an event.

4. If you do not hear from a potential donor within two weeks, you may send one follow up email making the request again.
5. Send the results of your solicitations (successful and unsuccessful) to the Development Committee with amounts pledged from each donor.
6. Be sure to send a thank you note to your sponsors and make public acknowledgements as promised.

See addendum B and F for additional resources.

Please note, on the ARLIS/NA [Donations](#) page, there is an option for an [unrestricted gift to a chapter](#).

### ***[3.7. Communication Guidelines](#)***

### ***[3.8. Style Guidelines](#)***

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## **Section 4: Chapter Governance**

### ***4.1. Administrative Documents & Tools***

Member-only administrative documents and links, including the society's governing and operating documents. Refer to the public Administrative Documents page for publicly accessible content.

- [Administrative Documents & Tools](#) – Members Only
- [Administrative Documents & Tools](#) – Public

### ***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.

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## **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. All chapter meetings should be submitted to the Society calendar via the [IT Request Form](#).

### **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. Please contact the chapters liaison for a request form.

#### **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 and Services 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 ARLIS/NA website (AWS) and other communication platforms.

#### **5.3.1 Project Charters**

### **5.4 Technology**

Headquarters supplies chapters with access to technology support on its [Technology Matrix](#).

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.

ARLIS/NA [holdings](#) including [chapters](#) with papers at UIUC.

## ***5.6 Digital Archiving***

[CARTA](#) 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***

ARLIS/NA chapters (and other constituent groups) may submit an application to request funds to support development and completion of special projects and products that further the goals of the society. Please note special funding requests from chapters will not be considered if a chapter's treasury funds exceed \$2,500 USD/CAD (currency dependent on the location of the treasury).

### ***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. The chapters liaison has a copy of many of the original TINs.

Each chapter should file the [990-N](#) form online using its name and number. As of 2022, individual users must create an account to file. Chapter tax years run from October 1<sup>st</sup> – September 30<sup>th</sup> and 990-N forms are due on February 15<sup>th</sup>. 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 likely 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.

Other options are to close the original bank account entirely and open a new one or move to a bank that accepts electronic bank signature cards. For example, ARLIS/NA headquarters uses Leader Bank, a US-based bank that handles all transactions and signature changes with secure, electronic transfers. Similar services are offered by other large banks in the US and Canada.



It is strongly encouraged to list more than one chapter member on the account in lieu of unforeseen circumstances. This will ensure the chapter still has access to the account. Recently, there was an issue where no current member was listed on a Wells Fargo account, which required extra documentation from the ARLIS/NA President to verify the legitimacy of the chapter to gain access.

## **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**

See Addendum B for Chapter Fundraising Guidelines.

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## **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.

See Addendum D for a template to send for membership renewal.

### **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 give 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.

As of 2025, there is now an option to donate unrestricted funds to a specific chapter during the bundled membership renewal process.

#### **[Bundled Membership FAQ](#)**

##### **7.3.1. Dues Reimbursements to Chapters**

Bundled membership dues will be sent to chapters via one of the below payment schedules.

- Chapters treasurer’s will be sent access to Bill.com to maintain their chapter’s account to receive monthly reimbursements either by ACH (electronic deposits) or paper checks from Bill.com for dues collected in the previous period (Most US Chapters);
  - When the treasurers or bank accounts change, the chapters should email Headquarters to edit their Vendor account in Bill.com and receive a new Bill.com invitation to complete in order to change the bank account.
  - If the bank account is not changing (only changing signers), Headquarters should still be notified in order to edit the email address in the chapter’s Bill.com vendor record.
- Chapter payments can also be sent as monthly paper checks via QuickBooks for dues collected in the previous period (International Chapters with non-US bank accounts).

### **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.

See Addendum C (email template) and D (flyer) to help with member recruitment.

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## **Section 8: Schedule**

ARLIS/NA chapters operate on the calendar year, with the exception of Executive Board appointments. The times below are given for general guidance but may change depending on annual conference dates.

### **January/early February**

1. Chapters liaison will conduct an orientation call with the new chair/president to enumerate pertinent policies, communicate responsibilities, and discuss chapter business.
2. Treasurers in U.S.-based and bi-national chapters will submit a 990-N form to the Internal Revenue Service on or before February 15.
  - a. NOTE: 990N filings usually reflect the prior calendar year. E.g., for February 2022, chapters would submit a 990N for the tax year covering October 1, 2020-September 30, 2021.

### **Spring**

1. Consider donating to the annual conference. Information about this will be sent out by the chapters liaison late February/early March.
2. Chapter chairs/presidents in attendance will be invited to attend the Leadership Institute meeting at the annual conference.
3. Prior to the annual conference a call will go out on ARLIS-L from headquarters regarding constituency group's business meetings. These meetings will be hosted virtually either prior to or following the in-person portion of the annual conference. Submission of the form will

ensure a chapter's meeting appears on the conference schedule. Chapters are encouraged to host informal get-togethers during the annual conference.

**Late Spring**

1. Chapters should submit any [Annual Funding Requests](#) in advance of the ARLIS/NA Midyear Executive Board Meeting. See Section 6.1.
2. Chapter chairs/presidents will submit a Goal-Setting Report by May 31.

**Fall/early Winter:**

1. Per chapter bylaws a nominating committee should be appointed to submit a slate of qualified candidates to fill upcoming officer positions.
2. Chapters must conduct an election and report the results to the chapters liaison by January.
3. Chapter chairs/presidents will submit an Annual Report by December 31.

**As appropriate**

1. Chapters may submit [Immediate Funding Requests](#), as needed. See Section 6.1
2. Chapters should meet, as determined by chapter bylaws and as needed.

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## 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 (specific to your chapter).
  - ✓ Blogs
  - ✓ Social media
  - ✓ Knowledge Commons
  - ✓ Google Workspace
  - ✓ 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*

- ✓ Read your chapter's bylaws.
- ✓ Read Chapter Success Book
- ✓ Read policies on chapter management in the Policy Manual, in particular Policy C.3.C and Section D.
- ✓ Read and comply with the Code of Conduct [Code of Conduct](#) / [Código de Conducta](#)
- ✓ Read [Technology Matrix](#) and request society-hosted technology through the chapters liaison, as needed
- ✓ Scan [Administrative Documents and Tools](#) for other information pertinent to your chapter role.
- ✓ Important things to know:
  - ✓ ARLIS/NA contracts with Barcami Lane, a management company based in Massachusetts. Barcami Lane provides technology and personnel support. ARLIS/NA's Executive Director, currently Amy Stark, is actually an employee of Barcami Lane. Our contract with Barcami Lane covers a finite number of service hours worked by headquarters staff.
  - ✓ Major/substantive questions, concerns, or requests for HQ support beyond the current scope of services should be submitted to the Chapters Liaison for consideration and discussion with appropriate parties.

- ✓ 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.
- ✓ 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  
<https://www.arlisna.org/file/secure/arlisnapolicymanual.pdf>
- ✓ Read Policy G.17 on development in the [Policy Manual](#)
- ✓ Read the Chapter Affiliation Agreement see Section 2.2.
- ✓ Read guidelines for special funding requests see Section 6.1.
- ✓ 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 by December 31.
  - ✓ Chairs/presidents must submit a goal-setting report by May 31. The goal-setting report allows the society to consider what we want to accomplish and ensure that our work is aligned with our strategic plan. Use the goal-setting process to think about your group's charge and mission and to plan activities and initiatives for the coming year(s).
  - ✓ 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.
  - ✓ Barcami Lane, Inc. serves as the association management company (AMC) for ARLIS/NA under the provisions of [ARLIS/NA Bylaws Article X](#). Barcami Lane, 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 Barcami Lane 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.
  - ✓ If your chapter does not have a membership coordinator, monthly membership reports will be emailed to you from the following address: [customercare@arlisna.org](mailto:customercare@arlisna.org). These reports only include members who have renewed/joined via ARLIS/NA.

### ***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 February 15, if in the U.S.
- ✓ Read guidelines for special funding requests see Section 6.1.
- ✓ Quarterly chapter dues reports will be emailed to you from LeighAnn Sciacca at Baracmi Lane ([lsciacca@barcamilane.com](mailto:lsciacca@barcamilane.com)). These reports will only include dues collected via ARLIS/NA.



### ***Checklist for Website Editing 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](#)

### ***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.
- ✓ 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 Addendum B and section 3.6.3
- ✓ 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.

- ✓ Monthly membership reports will be emailed to you from the following address: [customercare@arlisna.org](mailto:customercare@arlisna.org). These reports only include members who have renewed/joined via ARLIS/NA.

### ***Checklist for Mentorship/Student Outreach Duties***

#### Outgoing

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

#### Incoming

- ✓ Review mentorship program information (<https://www.arlisna.org/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 (development).

### ***Checklist for Archivist Duties***

#### Outgoing

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

#### Incoming

- ✓ Read Policy G.12.B on chapter-generated oral histories in the [Policy Manual](#)
- ✓ Read Section 5 on archiving.

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## 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 to 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 501(c)(3) organizations 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 that 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?

Gregory P. J. Most  
January 31, 2019

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## Addendum C: Membership Points

(created by the ARLIS/NA Membership Committee 2024)

Dear Chapter Chairs,

Hello from ARLIS/NA! We are reaching out to send you a memo to share with graduate students and new professionals to the art librarian field about the numerous benefits of ARLIS/NA membership. We hope you will consider sharing this email with your local universities and colleges who offer Library and Information Science degrees.

The [Art Libraries Society of North America \(ARLIS/NA\)](#) is a professional association promoting the interests of approximately 1,000 architecture and art librarians, visual resources professionals, artists, curators, educators, publishers, and students.

ARLIS/NA provides in-person and virtual programming at the local, regional, and international levels, as well as career development, presentation opportunities, tours, and meetings. We offer networking options through our annual conference, committees, and special-interest groups (SIGs), as well as local and international leadership opportunities.

We provide mentoring through local chapters and ARLIS/NA mentorship programs, both formal and informal. To help members with research and travel, we offer awards, some of which are open only to current or recent students. ARLIS/NA also offers publication opportunities, such as peer-reviewed articles in our journal *Art Documentation* and reviews in one of our [online review publications](#).

Please see our website for more information on our [mission, vision, and values](#).

For students and new professionals, ARLIS/NA offers a supportive community, including [ArLiSNAP](#), our group especially for new professionals.

The ARLIS/NA community offers:

- [ArLiSNAP](#) group for new professionals
- Networking with art information professionals locally and internationally
- [Mentorship at all career levels](#)
- New Voices in the Profession panel at our annual conference
- Publishing and editing opportunities
- [Local chapters](#) that organize unique programming in your local art libraries community
- Professional development programming including conferences, virtual presentations and town halls, roundtables, workshops, and chapter meetings
- [Travel](#) and [research](#) awards for students, plus other [award opportunities](#)
- Diverse opportunities for building professional skills -- committee participation, editorial positions, conference planning, fundraising, and other leadership roles
- Access to an engaged and supportive community of art information professionals

ARLIS/NA offers discounted [membership dues](#) for students and new professionals, as well as many other benefits. And even if you are unable to join us currently, you can still be a part of the ARLIS/NA conversations on our listserv [ARLIS-L](#).

Lastly, we present a summary of reasons to become a student member of ARLIS/NA:

- Practice lifelong learning
- Engage with your community
- Center DEIA principles
- Develop skills to lead and thrive
- Mentor and be mentored
- Grow your resume

Please don't hesitate to reach out to us if you have thoughts and questions about membership. We hope to see you at an event soon!

All the best,

INSERT NAME  
Membership Committee Chair  
INSERT EMAIL

INSERT NAME  
Executive Board Chapters Liaison  
INSERT EMAIL

INSERT NAME  
Executive Board Advancement Liaison  
INSERT EMAIL

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## Addendum D: Membership Renewal

Membership Invitation

Date

Name of President/Chair and Vice

### To XX Chapter Members who need to renew chapter dues:

Dear \*\*\*\*\*,

Thank you for supporting the Art Libraries Society of North America and the XX Chapter! As you know, membership in ARLIS/NA and the XX Chapter provides numerous benefits:

- Networking with professional colleagues who have similar interests and job responsibilities
- Collaborative scholarship and service opportunities
- Participation in professional development trainings
- Discounted registration to the ARLIS/NA annual conference
- Eligibility for travel and research scholarships and awards
- A subscription to Art Documentation and other [ARLIS/NA publications](#)
- Access to members-only web content and the online member directory

It's time to [renew your membership](#) in the XX Chapter (\$XX).

The Chapter currently has open volunteer positions. If you are looking for new opportunities for professional engagement, please email Chair/President email.

Thank you!

Name, XX President/Chair

Name, XX Vice-Chair

## Addendum E: Membership Recruitment Flyer

(created by the ARLIS/NA Membership Committee 2025-for a copy email the Chapters Liaison)

# ARLIS/NA

ART LIBRARIES SOCIETY of NORTH AMERICA

## Membership Benefits

Founded in 1972, ARLIS/NA is a vibrant and diverse group of art, architecture, visual resources, and design professionals dedicated to supporting art librarianship by promoting a forum for ideas, projects, and programs. Our membership comprises 1,000+ artists, curators, archivists, educators, publishers, students, and visual resource professionals.

## Annual Conference

Members receive a discounted rate to our annual conference, which convenes at culturally significant locations across North America, encouraging attendees to engage with local art and architecture.



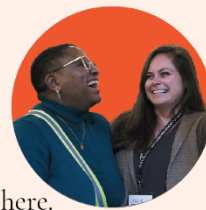
## Awards, Grants & Scholarships

ARLIS/NA recognizes the value of excellence in professional service, publishing, and original research by bestowing numerous awards and scholarships.



## ArLiSNAP

ArLiSNAP is our community for students and new professionals to share ideas, knowledge, exploration, and scholarship in a supportive and inclusive atmosphere.



## Additional Benefits

- Join one of sixteen regional chapters to connect with colleagues at conferences, social meetups, and tours.
- Sign up for local and international mentoring programs.
- Join committees, divisions, sections, and special interest groups.
- Interact with members on the ARLIS/NA Commons.
- Access the jobs list, publications, media, and tech reviews.
- Contribute to the peer-reviewed journal, *Art Documentation*.



Learn more about ARLIS/NA and explore membership options at [arlisna.org](https://arlisna.org)



Learn more about ArLiSNAP at [arlisnap.arlisna.hcommons.org](https://arlisnap.arlisna.hcommons.org)



**Addendum F: Chapter Ask Example Letter**  
(created by the ARLIS/NA Development Committee 2025)



Month Day, Year

Person  
Company  
Place

Dear ,

The New England Chapter of the Art Libraries Society of North America (ARLIS/NA) is celebrating its 50th anniversary on November 15th, 2024. We are planning a day of talks and tours ending with a late afternoon/early evening reception. I'm writing to invite you to join us in celebrating ARLIS New England. We are also seeking sponsors for the reception.

Paragraph with information about your event including why it's special/valuable.  
Where you are meeting, general purpose or itinerary. Perhaps how many attendees you expect. A theme if you have one. Including students in a special way?

ARLIS/NA is a dynamic organization promoting the interests of approximately 1,000 members, including architecture and art librarians, visual resources professionals, artists, curators, educators, publishers, and students. Local chapters play an important role in providing community and acting as a foundation for the international organization.

Acme Company has played an integral part in the success of our art libraries and collections nationally, and in particular to those of us in New England. We would love to have both your participation and a donation to support the reception in the range of \$100 - \$500. We will acknowledge sponsorships both locally within the chapter, at the event in November, and to the broader ARLIS/NA community.

[Include if the chair of Development Committee notifies you that the prospective donor already gives to ARLIS/NA]  
We understand that you donate to ARLIS/NA, and this is a separate solicitation to support the chapter for this one event. Know that should we receive more donations than are required for the reception, we will direct additional funds to our awards program.

We greatly appreciate your consideration of our request, as we realize budgets are tight and pulled in many directions. The financial support that you provide furthers the mission of ARLIS/NA to champion the arts information profession. Please let me know if you can support us and even more importantly, join us on November 15.

With gratitude,  
*Your name*

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Your Name  
Your role in your chapter