**Chapter Advocate Training Guide**

Final – July 2011

*Chapter advocates serve as the link between the Pacific Plains Region (PPR) chapter leaders and the PPR board. Their role is crucial in creating the two-way communication needed to continue to grow chapters, the region and IABC International.*

JOB DESCRIPTION

*Primary Role:*

The chapter advocate serves as a resource to three or possibly four chapters. The advocate is a coach and mentor to chapter leaders, primarily the president and president-elect. In addition to the coaching role, the chapter advocate functions as a two-way communications conduit and serves as a director on the regional board and is expected to participate in policy and procedure planning and implementation.

(From Bylaws: The Chapter Advocate Directors shall oversee all Region communications with Chapter leaders; oversee committees, work groups, and task forces that focus on soliciting leader/member input to provide direction for the IABC Executive Board and the Region Executive Committee; provide counsel and support to Chapter leaders; and other duties assigned by the Director.)

*Key Responsibilities*:

* Communicate regularly with the designated chapter leader/s to help them access the resources they need from the region, international and other chapters to fulfill their roles in an optimum manner.
* Visit assigned chapters to facilitate strategic planning, board orientations and/or deliver a professional development program.
* Communicate to region board regularly about chapter health.
* Attend region meetings (monthly teleconference and three in person).

*Skills/Qualifications Needed*:

* Experience as a chapter leader
* Tact, diplomacy, patience and strong interpersonal skills
* Creative approach to solving problems/identifying solutions
* Collaborative and consultative nature
* Working knowledge of resources available from the region and international

*Time Commitment*:

* Meetings (1.5 hours for monthly teleconference, two days plus travel for in-person meetings)
* Calls and emails to chapter leaders as needed (3-5 hours a month). Can vary dependent upon your style. Also time commitment to serve on Region committees.
* Travel for chapter visits (The goal is to visit each chapter once every two years, but sometimes these visits may be made by other region leaders, and some chapters have trouble scheduling visits, so chapter advocates may not attain that goal.)

*Resources*:

* Region board, including other chapter advocates
* PPR and IABC websites

**CHAPTER ADVOCATE (CA) – A TRAINING GUIDE OF FAQs**

**| Do other Regions have Chapter Advocates?**

PPR is currently the only Region with defined CAs in a board-level role.

*In the past, other regions under different titles have had similar positions working with chapter leaders. PPR has chosen to formally recognize the importance of the relationships we have with chapters in our region. We see CAs as being our link to provide resources, advice and assistance to PPR chapters.*

**| Are chapters required to report to the Region?**

PPR serves as an advisory resource. Chapters are not required to report to the Region.

*Essentially, chapters report to the Region through their CA, and whether or not they develop a cooperative relationship with their CA, is up to them. CAs, however, provide chapters a link to resources and chapter information from across the region as well as a chain-of-communication to IABC International and the International Executive Board.*

**| What resources do Chapter Advocates regularly use?**

Personal experience is number one, but other key resources include fellow CAs and board members, IABC staff or anyone you think can assist you. Also the IABC website and monthly Leader Letters provide excellent resources.

*Emails and phone calls are great ways to seek out information from anyone you think could be of assistance in the IABC network. Connecting chapter leaders with other chapter leaders who have solved a problem they are grappling with, or that do something particularly well, can also be helpful.*

**| What are the most common types of issues a Chapter Advocate deals with?**

Much of a CA’s work is troubleshooting questions and issues, offering advice and most importantly, listening. The most common issues include: succession planning, board governance, finance and volunteer management.

*Remember, a CA is a sounding board. Many times you are simply giving the chapter leader a chance to think through ideas and solve them on their own by offering resources and knowledge.*

**| Do Chapter Advocates meet to discuss issues?**

No, but CAs do rely on each other for wise counsel.

*CAs will often contact the Region Director or another CA to consult on issues they are working to resolve for a chapter.*

**| Is connecting with new chapter leaders difficult? Suggestions?**

As with all things, it depends on the chapter leader. In every case, you have to build on the relationship and show you are responsive. Be sure to communicate with them in the medium in which they are most responsive – email, phone, text, etc.

*A good way to keep continued good relations is to make contact with chapter leaders as they advance into leadership roles. Convince them that your job is to make them look good, and do it in a non-threatening way. A good CA best practice is to establish a contact rhythm with a new leader and start involving president-elects in calls several months before their leadership term begins.*

**| Any tips or tricks for dealing with difficult chapter issues/people?**

Build credibility by being transparent about your role, doing what you say you will do, listening more/talking less, and showing people you can keep confidences will win over most people.

*Being patient and trying different approaches is important; as with most issues, you don’t solve them in one try. If you can show a chapter you are resourceful and well connected, they are more likely to turn to you when issues arise.*

**| What kinds of issues are considered “critical” or “emergencies” with relation to the Chapters?**

If a chapter is not functioning as it should and the CA cannot help resolve the issue through their immediate counsel or resources, it should be considered a critical issue that needs to be brought to the PPR Board’s attention.

*A critical issue could be a governance problem, a major financial issue or other problems that threaten the chapter’s reputation and/or viability. Or it could be programming or actions that are not in the best interest of the members or IABC.*

| **What are some guidelines to follow when making Chapter visits?**

Guidelines are exactly that, and exceptions have been made. The above gives you some general structure to help you understand Region expectations that exist around chapter visits.

**Timing of Visits:**

*Chapters are typically visited on a regular basis following a 2- to 3-year rotation, which ensures some continuity through the three-year leadership process of a chapter (i.e., president-elect, president, past president).*

**Visit Costs:**

*Costs are typically done on 50-50 splits, meaning the chapter pays for 50% of the travel expense and the Region pays the other 50%. If a chapter is having a financial struggle and a CA feels a visit is important, the PPR board will give consideration to assuming more costs to ensure the chapter is visited.*

**What To Do on a Chapter Visit:**

*This should be negotiated with the chapter prior to the visit. Different chapters have different needs, so a CA needs to be flexible. CAs also have individual strengths that can play into the role they can play during a visit. Most importantly, a chapter visit should continue to build the relationship and strong connection the chapter has through the CA to the Region.*

**How to Report Back After a Visit:**

*There is no formal report required, but the common best practice among CAs is complete a written report that is shared with the board and other CAs, as well as share highlights at the next monthly PPR Board meeting. By sharing information you learned during a chapter visit with other CAs, it keeps everyone informed of where linkages can be drawn between chapters to provide further support, resources and best practices.*

| **What are regular chapter updates and type of information should they include?**

Each monthly Board packet contains a brief update from each CA on their chapters. The report can include information on everything from professional development offerings and fiscal state to awards or success and challenges they are facing. Both successes and challenges can be particularly instructive to other CAs, who may offer suggestions or learn from other chapters’ best practices to share with their own chapters. This information should be considered confidential, as it is often candid, although it should not be critical.

*A mix of information that speaks to chapter health, as well as any observations the CA may want to make, based on the ongoing relationship they develop, is appropriate. For example, reporting that a key chapter corporate membership may be in danger in your report, could also result in some resources from other board members who may have resources to address that issue. The information you share is also a way for you to tap into the experience and knowledge of the PPR board as a whole for the chapter you represent.*

**| What is the Chapter Advocate role at Region chapter leader meetings?**

CAs should be the most visible PPR resource to chapter leaders and hold a prominent role in representing PPR at such events. CAs are typically asked to lead topical discussions and report issues, best practices and other information back to the PPR Board at a future meeting.

*CAs serve as facilitators, mentors and coaches during chapter leader meetings. Most importantly, Region Chapter Leaders meetings provide time for face-to-face communication between CAs and chapter leaders, which is crucial in building strong relationships for the Region.*

**| Any advice for a new Chapter Advocate?**

Reach out to other CAs and ask about their experiences. Chapter leaders are all different and different methods and approaches have to be adapted each time leadership changes. It is important for a CA to be the one who markets what the Region offers through the relationship they bring.

*If possible, have a conversation with the chapter advocate you are replacing. They may have valuable knowledge about the chapter and it will make that first contact feel less like a “cold call.”*

**| What do you find rewarding about being a CA?**

A few quote comments from PPR Chapter Advocates:

*“I like seeing the "a-ha" moments they have when they realize they aren't alone. I enjoy coaching other leaders. I also like that this is a way for me to stay involved without the amount of day-to-day work that being a chapter leader involves.”*

*“Mentoring and helping individuals grow professionally; helping them see the value of IABC in their career development”*

*“It's the best job on the PPR board. You get to leverage your leadership experience to help others solve problems -- many of which are new to them, but not to you. You also get to nudge leaders "outside the box," by helping them assess their strengths and challenges in more objective ways. That can build a solid foundation for chapter growth and development.”*

*“The CA role is about sharing expertise and making things work more easily for chapter leaders, who give a lot to their fellow professionals and deserve to be supported. I am and have always been a strong believer in IABC and the community it offers. Also, I was in a chapter that had a huge issue with a president who was disruptive to the chapter and the board, and did not support the spirit and mission of IABC; our CA was great in helping us work through that crisis. I find that chapters often feel they need to “go it alone” and solve things themselves; they become more isolated when they have problems instead of reaching out to people who can help them. I don’t know if this is because their IABC leaders have failed them in the past or because they are like that as individuals, figuring that they are the only ones who really understand what they are going through when times are tough.”*

**| What is the role of the Lead Chapter Advocate?**

The lead Chapter Advocate bring CAs together on a regular basis to share ideas, concerns and to manage chapter visit schedules.