



# Achieving Council Excellence

WISE WAYS TO EXCEED MEMBER EXPECTATIONS  
AND  
SCORE HIGHER ON THE COUNCIL OF EXCELLENCE AWARD

2017

# Council of Excellence Award Overview

- ▶ Created in 2014 to recognize councils positioned for success
- ▶ Named in honor of Walter Lee Davis, Jr and Leonard H. Neiman for their significant work in strengthening council relationships
- ▶ 2015, first CoE awards made based on affiliated council size
- ▶ Focuses on specific council traits that promote success
- ▶ Rewards both CoE as well as 5 Star councils with valuable benefits
- ▶ 2017 Awards information/application on website; due by 5/5/17

# Importance of being an active council

## Successful councils share similar qualities

- ▶ Working together as a multi-disciplinary team
- ▶ Use board members skills to enhance operation
- ▶ Committed to exceeding member expectations
- ▶ In touch and using services from national
- ▶ Involved in relevant, timely and unique activities
- ▶ Camaraderie plus a warm and welcoming feeling

# The CoE and maximizing council success

## Important attributes that drive council success

- ▶ Leadership and Council Management
- ▶ Membership Growth and Retention
- ▶ Programming and Events
- ▶ Communications
- ▶ Financial Health
- ▶ Public Outreach
- ▶ Maximizing your NAEPC Relationship

# Leadership & Council Management

## Key aspects of successful councils

- ▶ An active and engaged board with a vision
- ▶ Diversity, team work and a commitment to serve
- ▶ In depth succession plan for officers
- ▶ Annual agenda that delivers real value to members
- ▶ Current by-laws, an administrator and liability coverage

# Membership Growth & Retention


NAEPC's core values support the team concept of Estate Planning and so should a council's membership

- ▶ An inclusive warm and welcoming atmosphere
- ▶ An active plan to retain members and recruit new ones
- ▶ Programs with broad appeal and compelling value
- ▶ Alternative member categories
- ▶ A focus on multi-disciplinary growth and out reach

# Programming and Events



Premier educational events and networking are the hallmarks of council success

- ▶ Agenda is planned early in the year and well advertised
  - ▶ Timely, thought provoking content drives attendance
  - ▶ Topic diversity that engages all disciplines
  - ▶ C.E. credit if available
  - ▶ Satisfaction surveys can optimize future events
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# Communications

Excellent communications maximizes member experiences


- ▶ Informative up to date website
- ▶ Communications that are timely, clear and complete
- ▶ Good methodology maximizes an announcement's impact
  - ▶ Well in advance with follow up
  - ▶ Catchy titles that attract attention
  - ▶ information that create interest and drives attendance
  - ▶ Ease of registration and payment



# Financial Health



Strong councils are financially sound

- ▶ Creates and monitors an appropriate budget
  - ▶ Has an annual surplus
  - ▶ Promotes sponsorship and other non-dues revenue sources
  - ▶ Maintains sufficient capital surplus
  - ▶ Is a good steward of member's dues
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# Public Outreach

Community outreach comes in many forms; all are important

- ▶ Hosting Estate Planning Day
- ▶ College student mentoring and scholarships
- ▶ Pro-bono counseling via public organizations or solo
- ▶ Working within the community to promote good will
- ▶ Joining with other professional groups for civic betterment
- ▶ Encouraging members to participate in EP related outreach programs

# Maximizing your NAEPC relationship

NAEPC's many services enhance a council's ability to serve members better. Here's a sample:

- ▶ Variety of website choices
- ▶ Participation in the "Every Council Campaign"
- ▶ Council nominated AEP designee program
- ▶ Annual Conference and Council Leadership Day
- ▶ Leimberg Information services
- ▶ Webinars on a variety of relevant topics
- ▶ Volunteer leadership positions
- ▶ No Charge Speaker program

# Successes, Challenges & Uniqueness

Every council has a story worth sharing. All are unique and worth hearing, so tell us yours.....

We may share it on Council Leadership Day and on the website

- ▶ Is it a way of doing things differently that proved highly successful
- ▶ Perhaps it was an experience that that could be cautionary to others
- ▶ Or something truly unique and out of the ordinary you are proud of

# Equating the two awards

Both awards made at the National Conference

## Council of Excellence Award

- ▶ Recognition for achieving the highest level of council excellence
- ▶ Comped Conference registration for 2 board members
- ▶ All reasonable expenses paid “No charge speaker” program option
- ▶ A year of comped group Webinars
- ▶ Cited in NAEPC newsletter/website
- ▶ Icon for website and printed matter
- ▶ Press release provided

## 5 Star Award

- ▶ Special recognition for exceeding expectations across the board
- ▶ Awarded at the judging panel's discretion
- ▶ A year of comped group Webinars
- ▶ Cited in NAEPC newsletter/website
- ▶ Icon for website and printed matter
- ▶ Press release provided

# Mentoring with the “Winners”

- ▶ An opportunity for other councils to augment their skill sets
- ▶ “Learning from the Leaders” can provide new ideas/avenues
- ▶ Wise advice and encouragement is available via:
  - ▶ Leading councils sharing their experiences at Council Leadership Day
  - ▶ Connecting with councils who share their experiences on the web
  - ▶ Collaborative out reach and assistance to councils pursuing ideas/help

# Participation Benefits

“Winning” at home and in the CoE award competition

- ▶ Be pro-active and aim high with notable goals
- ▶ Be member-centric, always seek to please and satisfy
- ▶ Achieving excellence is a pride driven board focus shared as a team
- ▶ Strive to do your best and go the extra mile, it pays off!
- ▶ Maintain an active “council-member-NAEPC” relationship
- ▶ Most of all enjoy your leadership role and mentor the next generation

# Preparing for competing in the Council of Excellence Award

- ▶ Begin by reviewing all the topics in this presentation
- ▶ Each topic covers a council's role in a strategic area
- ▶ Improve in areas that need attention to maximize performance
- ▶ Council activity will enhance your ability to score higher
- ▶ Scoring is based on checked boxes plus activity
- ▶ Make a timely submission; deadline is Friday, May 5, 2017
- ▶ Best Wishes for a very successful year!



# Soar like an Eagle

*Pride*

*Passion*

*Purpose*

*Perseverance*

See you at the 2017  
CoE Award competition in  
New Orleans!

