

# Achieving Council Excellence

WISE WAYS TO EXCEED MEMBER EXPECTATIONS

AND

SCORE HIGHER ON THE

WALTER LEE DAVIS, JR. & LEONARD H. NEIMAN  
COUNCIL OF EXCELLENCE AWARD



# 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
- ▶ Awards information/application available in spring



# Importance of Being an Active Council

Successful councils share similar qualities

- ▶ Working together as a multi-disciplinary team
- ▶ Use board member skills to enhance operation
- ▶ Committed to exceeding member expectations
- ▶ In-touch and utilizing 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
- ▶ 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 service
- ▶ 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
- ▶ Continuing education credit if available
- ▶ Satisfaction surveys can optimize future events



# 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



# Outreach

Community outreach comes in many forms; all are important

- ▶ Hosting Estate Planning Day or consumer outreach event
- ▶ Pro-bono counseling via public organizations or solo
- ▶ Working within the community to promote good will
- ▶ Encouraging members to participate in EP related outreach programs
- ▶ College student mentoring and scholarships



# Maximizing Your NAEPC Relationship

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

- ▶ Participation in the "Every Council Campaign"
- ▶ Council nominated AEP® designation program
- ▶ Annual Conference and Council and Regional Leadership Days
- ▶ Webinars on a variety of relevant topics
- ▶ 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

*\*one connection, presented in a group format*



# 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



# Benefits of Participation

“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
- ▶ Achieving excellence is a team focus involving pride
- ▶ Do your best and always go the extra mile, it pays off!
- ▶ Maintain an active “council-member-NAEPC” relationship
- ▶ Most of all enjoy your role as a council leader



# Preparing for and Competing in the Council of Excellence Award

- ▶ Begin by reviewing all the topics in the application
- ▶ Each topic covers a council's role in a strategic area
- ▶ Improve in areas that need attention to maximize performance
- ▶ Enhance your ability to score high by being very active
- ▶ Scoring is based on checked boxes and activity
- ▶ Be aware of all Award dates and make a timely submission





# Soar like an Eagle

*Pride*

*Passion*

*Purpose*

*Perseverance*



See you in the  
CoE Award competition!



# Contact Us

National Association of Estate Planners & Councils  
1120 Chester Ave., Ste. 470  
Cleveland, OH 44114

866-226-2224

[admin@naepc.org](mailto:admin@naepc.org)

[www.NAEPc.org](http://www.NAEPc.org)



# Acknowledgment



This slide deck was created by NAEPC Council Relations Committee member John Meyer. John was a long-serving volunteer with NAEPC, among other organizations, until his passing in 2018.

We are grateful for the opportunity to know John and to have worked with him during his time with NAEPC.

