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 outreach 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

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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.