

## COUNCIL LEADER EDUCATION SERIES SESSION NOTES

Program	Roundtable: Starting Your Council's New Year
Date	Wednesday, January 26, 2022
Topics Covered	Exploring the Nomination Process The Yearly "Basics" Checklist Benefit Review Board Transitions

### EXPLORING THE NOMINATION PROCESS

Councils handle the nomination process in varying ways; NAEPC does not set these guidelines.

How does your board determine vacancies?

- Bylaws
- Term limits

How does your council handle the nomination process?

- Send a letter to members asking for interest
- Look at the committee volunteers for potential board members
- Gather input from past and current leaders

### THE YEARLY "BASICS" CHECKLIST

What follows is a basic checklist of actions or activities that your board may wish to use each year.

- Set and share the entire schedule of board meeting dates and times so that the entire leadership can block the time
- Schedule a transition meeting so the incoming and outgoing presidents can share goals and best practices
- For councils with staff, schedule a president : staff meeting to align roles, duties, and expectations
- Activate key committees
- Create the budget
- Review all pages of website and make updates
- Update key documents
- Send a message from the new president to the membership
- Set timeline of key activities (survey, dues notices, follow up, etc.)
- Create editorial calendar for social media accounts
- Announce programming schedule for year



- Complete necessary documents – commitment statements, whistleblower policies, conflict of interest statements
- Review insurance coverage

We also suggest reviewing this checklist related to NAEPC items:

- Appoint someone to the “NAEPC Liaison” position and make sure to share that person’s name and contact details with the national office
- Send NAEPC an [update of board members & their contact details](#)
- Decide who will be attending the events planned for council leaders & register
- Make sure all board members have joined the group on Linked in for council board members
- Gather materials from NAEPC to ensure that your members are well-versed in the benefits they can take advantage of / consider scheduling a 30-minute benefit review call with the national office
- Discuss whether your EPC will participate in key NAEPC programs, like the “[Every Council Campaign](#),” Accredited Estate Planner® designation [Council Nomination Program](#) (a \$500 stipend is available to host an AEP® Informational Session), the [Council of Excellence Award](#) & the [LISI service](#)

## BENEFIT REVIEW

### Fun Facts

- NAEPC was formed in 1960s as National Association of Estate Planning Councils, updated later to reflect the addition of individual members through the AEP® designation
- Members are councils and designees

### Benefits for Members

- [Value Partners](#)
- Educational Offerings through [Annual Conference](#) and [webinar program](#)
- [NAEPC Journal of Estate & Tax Planning](#)
- LISI service (optional benefit of membership, councils must participate)
- Council nominated AEP® program

### Making the Connection for Council’s Members

- Share info verbally and in print
- Add a statement about affiliation to council’s email signature
- Participate in the Every Council Campaign
- Empower the council’s executive / staff member to be a leader in the relationship

### Benefits for Councils

- Part of the national network
- Best practices through training events, access to staff, and the [Council of Excellence](#) program
- [Programming Resources](#)
- [Website Solutions](#)
- Access to the network of council leaders at events and [leader group on LinkedIn](#)

## BOARD TRANSITIONS

A smooth and efficient board transition is critical to any organization. It eliminates wasted time caused by “regrouping,” keeps member service flowing, and creates structure that helps new board members feel welcome, informed and ready to start working immediately.

### Board Transition Ideas:

- Detail the expectations of board members clearly. Invite feedback.
- Make getting to know one another a priority through the entire year – board social, board activity, ample time for introductions and “getting to know one another” activities
- Schedule a full board meeting for high-level discussion items
- Make sure everyone on the board can verbalize the council’s value proposition similarly
- Ask “WHY” questions
- Set organizational goals that every committee works toward. Use these goals in tandem with the mission statement to ensure there will be no mission creep. (Hint: goals aren’t always about numbers.)
- Find out what members are passionate about and make assignments based on those passions.
- Survey the board about their feelings on important topics
- Host a board orientation for executive leaders and new members

## UPCOMING EVENTS

- <https://www.naepc.org/affiliated-councils/council-leader-education>

## CONTACT US

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