



## CHECKLIST FOR STARTING YOUR COUNCIL'S NEW YEAR

*This document offers a starting point for the annual board transition – your council's needs and activities may vary.*

### THE BASICS

- 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
- Appoint a board member to the “NAEPC Liaison” position
- Review and update all pages of website
- Update key documents
- Send a message from the new president to the membership
- Set timeline of key activities (survey, dues notices, awards, follow up, etc.)
- Create an editorial calendar for social media endeavors and assign responsibilities
- Announce programming schedule
- Review insurance policies (general liability and directors & officers' policies are recommended by NAEPC)
- Transfer records, documents, and passwords
- Plan a bank “signing party” and update records with merchant account provider
- Engage past leaders
- MAKE HAVING FUN A PRIORITY!**

### INTEGRATING WITH NAEPC

- Send NAEPC an [update of board members & their contact details](#)
- Decide who will be attending the [events planned for council leaders](#) & register for the programs
- Make sure all board members have joined the [group on LinkedIn](#) for council board members
- Gather materials to ensure members are well-versed in the benefits provided by NAEPC
- Discuss whether your council will participate in key programs: the “[Every Council Campaign](#),” Accredited Estate Planner® designation [Council Nomination Program](#), the [Council of Excellence Award](#) & the [LISI service](#)

### THE BOARD

- Set and share the schedule of board meeting dates and times for the entire year
- Detail board member expectations clearly and invite feedback
- Make getting to know one another a priority: schedule board social(s) or activities and provide ample time for introductions and “getting to know one another” activities
- Schedule a board transition meeting for high-level discussion items and to establish key initiatives
- Make sure everyone on the board can verbalize the council's value proposition and mission statement
- Set membership recruitment goals for each board member
- Set goals (financial or otherwise) that every committee works toward; using them in tandem with the mission statement ensures there will be no mission creep
- Encourage the board to always ask the tough “why” questions
- Find out what volunteers are passionate about and make assignments based on those interests
- Survey the board about their feelings on important topics
- Complete and archive any necessary documents: commitment statements, whistleblower policies, conflict of interest

*A smooth and efficient board transition eliminates wasted time, keeps member service flowing, and creates an environment that helps new board members feel welcome, informed, and ready to start working immediately.*