

A Council's Yearly Operations Checklist

Ideally, many of these actions occur before the official start of the year.

- Set and share the entire schedule of board meeting dates and times (Outlook invitation suggested) so that the entire leadership can block the time in their calendar
- Schedule a transition meeting so the incoming and outgoing presidents can share goals and best practices
- Schedule your board's annual planning retreat
- Host a board orientation for new members
- 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 and make sure to share that person's name and contact details with the national office
- Review and update all pages of council's website
- Update key documents
- Send a message from the new leader to the membership
- Set timeline of key activities (survey, dues notices, follow up, etc)
- Create editorial calendar for social media accounts and key communications like newsletters
- Announce a programming schedule for year
- Prepare, distribute, and ensure completion of all participation documents - commitment statement, whistleblower policy, conflict of interest
- Review insurance policies
 >NAEPC recommends all councils carry both general liability and directors & officers' insurance
- Plan a bank signing party to transfer any signature cards, etc.
- MAKE PLANS TO HAVE FUN AND TO ALLOW BOARD MEMBERS TO CREATE RELATIONSHIPS OUTSIDE OF THE BOARD ROOM!

NAEPC-Related Items

- Identify the council's Council Relations Committee representative.
- Send NAEPC an update of board members & their *complete* contact details when paying dues or at any time these individuals change
- Decide who will be attending the Annual Conference and Council Leadership Conference and make sure the expense is budgeted
- Create a plan for promoting the Annual Conference to members
- Review the schedule of events hosted in the Council Leader Education Series with the entire board and plan who will attend those that resonate with the council
- 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 available with membership
- Consider scheduling a 30-minute benefit review call with the national office or your council relations committee representative
- 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 during 2021), the [Council of Excellence Award](#) & the [LISI service](#)