



# Supporting IECA Regional Group Leaders

*Developed by IECA's Education & Training Committee and the Regional Group Ad Hoc Committee*

Thank you for leading a Regional Group. We hope that you will have an exciting and rewarding experience as you create opportunities for growth and education for the IECA members in your area. Regardless of your experience as a leader or the level of expertise of your group, this manual will serve as a guide to help you get started, connect with resources, and plan for the coming year.

## **BENEFITS OF TAKING A LEADERSHIP ROLE**

- Creating new and cultivating existing relationships with colleges, schools, and programs.
- Giving back to area IECA colleagues.
- Developing leadership skills.
- Contributing to continued education efforts and serving as a link between IECA members, colleges, schools, and programs.
- Providing members with expanded opportunities for continued education.
- Being supported by and mentoring colleagues.

## **KEYS TO SUCCESS**

- Get the word out: Many groups will begin by having a planning meeting to kickoff and get a consensus for group activities.
- Be welcoming and inclusive of new members (introductions, name tags, friendly seating, etc.).
- Involve members and invite feedback.
- Consider the needs of members of all experience levels and areas of expertise (colleges, schools, and therapeutic).
- Plan ahead.
- Keep in touch with IECA and use their resources.
- Be receptive to the needs of your group.
- Be receptive to new opportunities and ways for your group to gather.
- To foster networking, Regional Groups should be free to collaborate with adjacent Regional Groups on events and meetings, particularly if the groups are smaller.
- Encourage participation in IECA national events (Annual Conference, symposia, webinars, etc.) and arrange to meet at those events.

## **RESOURCES AVAILABLE TO IECA REGIONAL GROUPS**

- Your Regional Group Member Network community for ease of effective communication.
- The IECA Member Experience Manager.
- Quarterly Regional Group leadership meetings chaired by Vice President of Membership; watch the recordings if you can't attend live. See [Regional Group Chair Library](#).
- If Regional Group chairs don't already have a Zoom account, IECA can set one up for you on the IECA Zoom account. However, if you already have a professional Zoom account (not the free version), it is easier to use that for your Regional Group meetings. An IECA Zoom account requires a new email address to sign in, which many members find more onerous than using their existing Zoom account.

- General information and resources: See Regional Group Resources in the [Regional Group Chair Library](#).

## ORGANIZATION

### Plan Events

#### To encourage attendance and enable members to plan their work schedule:

- Create a calendar of events for the school year. See Calendars in the Regional Group Resources in the [Regional Group Chair Library](#).
- Plan and share a meeting schedule. If this is not possible, choose the same day each month (for example, the second Tuesday).
- Have a consistent place and time to meet online or in person. A restaurant with a meeting room is a nice option—everyone has to eat, don't they?!
- Keep the time consistent; if you advertise the meeting as an hour, stick to that time frame.

#### Generate ideas for at least three yearly meetings, either in person or online:

- Solicit ideas for meeting topics and venues from the membership.
- Consider sending a survey to members to solicit ideas for meeting topics and venues from membership. See [Central Texas Regional Group's Survey](#).

#### Suggestions:

- Feature speakers at your meetings.
  - Some of the most popular speakers will probably be those from colleges and schools—local ones or perhaps college and school reps who are visiting the area. See [Sample of Communication with an Admissions Rep](#) from Atlanta Regional Group.
  - Offer educational workshops taught by either members or outside professionals such as therapists, test prep tutors, executive function coaches, financial aid experts, and educational therapists.
- Host a roundtable discussion on a pressing topic:
  - “Share results” sessions.
  - Share best practices or resources about client management platforms, technology, and other business practices that members will find useful.
  - End of season debrief. See [End of Season Debrief Meeting Questions](#) from Chicago Regional Group.
- Arrange a social event such as a professional cocktail hour or coffee meet up.
- Schedule a field trip: arrange visits to local colleges/schools of interest. By planning and attending this as a group, the cost can be shared, and connections made.
- Gather volunteers to participate in events run by the local ACAC—a local chapter of NACAC.
- Allow time for networking.
  - Regional Groups give IECA members the opportunity to bounce ideas off of each other and seek input in their day-to-day challenges. Since many members are solo practitioners, there is a need to share.
  - Alternatively, designate one or two meetings for networking only.
- Identify schools, colleges, programs, and speakers of interest to members of all specialties: college, schools, therapeutic, grad school.
- See [Possible Topics for Regional Group Meetings](#).

### **Coordinate Events**

- Plan well in advance.
- Refer to IECA Regional Group and Events Procedures to conform to IECA guidelines.
- Involve other members in planning, hosting, and running the event:
  - Communications (see below)
  - Speaker outreach/invitation
  - Event coordinator (for a single in-person event)
  - Tours/Symposium, if developed
  - Annual Conference support, if in region
- Consider a variety of venues:
  - A member's office
  - Program site
  - School or college
  - Restaurant or coffee shop
  - Meet remotely
- Plan for refreshments, if necessary. Please note that IECA will not reimburse for such expenses.

### **Use Technology**

- Decide in advance if you will record a virtual event (in entirety or certain segments) and make an announcement.
- Get consent of presenters before recording an event. If a member does not consent to the recording, they can, of course, choose not to attend.
- Announce when an event is being recorded before starting the recording.
- Decide in advance if AI technology will be allowed and make an announcement to your members.
- Accommodations must be made for members with disabilities.
- If you do record a presentation, it should be uploaded into your regional group's library on the IECA Member Network.

## **COMMUNICATIONS**

### **Regional Group Logos**

- Request your group's personalized RG logo from the Member Experience Manager.

### **With Speakers**

- Communicate with the speaker before and after the meeting.
- As a practice, please send out a thank-you note to speakers who presented to the group, especially college representatives.

### **Within the Regional Group**

- Publicize Events:
  - To have your Regional Group event added to the Member Network calendar and shared in 5 Minute News, complete the [Upcoming Events form](#).
  - Use the Regional Group Member Network to:
    - Send out an announcement with the date, time, and location.
    - Ask for RSVPs when needed.
- Send out a final reminder prior to the meeting.
- Communicate through the your Regional Group community on the Member Network.

- Create a Regional Group calendar. See [Copy of Calendar - Central Texas Regional Group](#).
- Send a standard welcome email to all new members.

### Keep IECA in the Loop

- Inform Member Experience Manager about RG events when they pertain to IECA membership at large, entail a deposit or contract, or if any questions are raised regarding an event. Add to Member Network Calendar using [this form](#) and for financial queries: [Request for Bus Rental Deposit form](#) or [Request for Event Space Rental Deposit form](#). Inform Member Experience Manager of non-IECA member attendees upon both their first meeting attendance and their last/ third.
- Take photos of events and gatherings and send these to IECA's *Insights* Editor at [Insights@IECAonline.com](mailto:Insights@IECAonline.com).
- Update Regional Group Library with any attachments or resources from speakers.
- See [Regional Group Chair Library](#).
- When beginning to plan a symposium or tour, be certain to plan in conjunction with Member Experience Manager.

## SUGGESTED ROLES AND RESPONSIBILITIES

### Regional Group Chair

- Direct the Regional Group within the framework of the IECA Regional Group Leadership Onboarding Training. See Regional Group Resources in the [Regional Group Chair Library](#).
- Meet with the vice chair on a recurring basis to discuss meetings, speakers, and group concerns.
- Remind members of IECA standards and practices when appropriate.
- Develop opportunities for volunteers and identify potential new leaders.

### Regional Group Vice Chair

- Chair the welcome committee.
- Meet with the chair on a recurring basis to discuss meetings, speakers, and group concerns.
- Handle some of the correspondence from admission officers and vendors.
- Serve as the record keeper (topics for future meetings, issues which need to be sent to the IECA office).
- Suggest or help plan some of the monthly virtual meetings.
- Suggest or help write the annual interest survey.
- Formally meet with chair and ex officio for nomination of new leadership in April.

### Regional Group Ex-Officio Chair

- Provide continuity to leadership.
- Mentor chair and vice chair.
- Meet with the chair and vice chair as needed to discuss meetings, speakers, group concerns, and new leadership.

## DEVELOP A SUPPORT NETWORK AND OFFER OPPORTUNITIES

Encourage volunteers to take on specific roles to increase involvement and provide training for leadership.

### Potential Regional Group Volunteer Opportunities

- Publicity (*Insights* articles and photos; 5 Minute News)

- Communications (to IECA office and within Regional Group)
- Speaker Outreach (to college reps and other professionals)
- Event Coordinator (for a single in-person event)
- Tours/Symposium, if developed
- Annual Conference support, if in region
- Support IECA initiatives

### **KEEP THE MOMENTUM GOING**

- Reflect on your Regional Group's success and communicate with members.
  - Provide recognition to those who have organized tours and meetings and supported the group efforts.
  - Share your success by communicating with the IECA Member Experience Manager.
  - Organize a discussion group at the end of the year to reflect on activities and set goals for the upcoming year.
  - Plan a Regional Group meetup during IECA's Annual Conference by scheduling with the Member Experience Manager (recent opportunities have included dedicated roundtables or breakfast tables).