



INDEPENDENT EDUCATIONAL
CONSULTANTS ASSOCIATION

2026–2027 Affinity Group Coordinator Handbook

**Your Essential Guide to Leading,
Organizing, and Growing Your Affinity Group**

Welcome, Affinity Group Coordinator!

Thank you for taking on this important volunteer role. Leading an Affinity Group is one of the most meaningful ways you can contribute to IECA and to the professional community of independent educational consultants who share your interests and practice area. We hope your experience will be exciting, rewarding, and impactful.

This handbook consolidates everything you need to know into one easy-to-reference guide — from organizing meetings and communicating with members, to coordinating outreach to institutional partners and keeping IECA informed. You are not alone. IECA staff members are always available to help.

Section 1: Procedures & Guidelines

Purpose & Objectives

The purpose of these guidelines is to establish clear procedures for the formation, management, and dissolution of Affinity Groups within IECA. The objectives are:

- To foster a sense of community among members with shared interests.
- To provide a platform for networking, knowledge sharing, and collaboration.
- To support professional growth and development within specific interest areas.

Membership

- Affinity Groups should consist of IECA members only.
- Any IECA Professional, Associate, or Student member is welcome to join an Affinity Group.
- Emeritus members may be invited to events but are not able to participate in Member Network communities.
- Members whose IECA membership has lapsed will be removed from Affinity Group communities on the Member Network.

Starting a New Affinity Group

1. Determine the statement of purpose for the group.
2. Identify a volunteer Coordinator and Co-Coordinator.
3. Use the Member Network to gauge interest in supporting the group's formation.
4. Complete the [Request New Affinity Group form](#) for approval to move forward.

Approval is based on alignment with IECA's mission and the potential value to the membership.

Leadership Rotation

- Leadership may only be held by a Professional or Associate IECA member. Associate member Coordinators are encouraged to pursue Professional membership as soon as they are eligible.
- Leadership roles rotate every one to two years to ensure opportunities remain accessible to all members and to maintain a continuous cycle of renewal.
- Current Coordinators are responsible for identifying their successors by the IECA Annual Conference in May, ensuring a smooth transition by June.
- Coordinator names will be listed on the Affinity Group's Member Network community.

Selection Guidelines

If multiple volunteers come forward, the best approach is to hold a member vote. Each volunteer should provide a brief statement about themselves and why they wish to serve. Distribute via any survey software and proceed with a simple majority.

- Personally inform each candidate of the outcome before submitting the winner's name for approval and before making any announcement.
- Submit the names of potential leaders to IECA staff to confirm they are members in good standing before announcing.
- If difficulty arises in identifying new leaders, contact IECA staff for assistance.

Private Affinity Groups

Certain Affinity Groups — such as the Black IECs, Latinx/Hispanic IECs, and Jewish IECs — are designated as closed groups. This ensures that members who share similar backgrounds, religions, or cultural identities can communicate openly and safely within their community. These groups provide a space to discuss issues relevant to shared experiences while fostering a supportive and inclusive environment.

Support & Training

- The IECA office provides support.
- Affinity Group Coordinator training is held annually, with quarterly leader meetings for ongoing training and knowledge sharing.
- Coordinators are trained in legal and fiduciary responsibilities to avoid jeopardizing the organization's not-for-profit or financial status.
- Affinity Groups may not maintain their own bank account, per IRS regulations.

Dissolution of Affinity Groups

Criteria	Details
Grounds for Dissolution	Membership falls below 5 active members, the group becomes inactive, or it no longer aligns with IECA's mission.
Process	A dissolution proposal should be submitted to IECA staff. The final decision will be made by IECA with input from the group's members.
Transition Plan	Where feasible, a transition plan will be developed to support members in joining other groups within IECA.

Compliance & Ethics

- All Affinity Group members are expected to adhere to the IECA Code of Conduct and professional standards at all times.
- Any conflicts within the group should be addressed promptly and respectfully. If necessary, IECA staff and the VP for Membership and Engagement may mediate disputes.

Section 2: Benefits & Keys to Success

Benefits of Taking a Leadership Role

- Creating new relationships and cultivating existing ones with IECA members.
- Developing leadership and organizational skills.
- Contributing to continued education efforts for the profession.
- Providing members with expanded opportunities for professional growth.
- Being supported by and mentoring colleagues.

Keys to Success

- Get the word out — consider a kickoff planning meeting to build consensus on group activities.
- Be welcoming and inclusive of new members at every meeting.
- Involve members actively and invite regular feedback.
- Consider the needs of members of all experience levels and specialties (college, schools, and therapeutic).
- Plan ahead and maintain a consistent meeting schedule.
- Keep in touch with IECA and make use of available resources.
- Be receptive to the evolving needs of your group.
- Collaborate freely with other Affinity Groups on events and meetings.
- Encourage participation in IECA national events — Annual Conference, symposia, webinars — and arrange to meet at those events.

Section 3: Organization & Planning Meetings

Planning Your Events Calendar

IECA does not prescribe specific expectations for the number or type of events — groups should feel empowered to design activities around the unique needs of their members. As you develop your calendar, consider:

- What unique value can your Affinity Group offer that best meets the needs of your members?
- What trends are shaping the work of IECs aligned around your particular interest or practice area?
- Affinity Group events should be tailored to the specific interests and needs of your group.
- Avoid scheduling conflicts with IECA-wide events such as Professional and Associate & Student Virtual Roundtables and College Conversations.

Creating a Consistent Schedule

- Create a calendar of events for the year and share it with all members.
- Choose a consistent day and time each month (for example, the second Tuesday at noon ET) and stick to it.
- If a full calendar is not possible early on, choose one recurring slot and build from there.
- Keep meeting times consistent — if you advertise an hour, end on time.
- Affinity Groups must meet at least three times per year.

Meeting Ideas & Topic Suggestions

- Feature speakers from colleges, schools, and programs.
- Offer educational workshops led by members or outside professionals such as therapists, test prep tutors, executive function coaches, financial aid experts, or educational therapists.
- Host roundtable discussions on pressing professional topics.
- Hold "Share Results" sessions where members discuss outcomes with clients.
- Share best practices on client management platforms, technology, and business practices.
- Gather volunteers to participate in events run by the local ACAC chapter.
- Dedicate one or two meetings per year to networking only.
- Identify schools, colleges, programs, and speakers of interest to all specialties in your group: college, schools, therapeutic, and grad school.
- Bounce ideas off each other and seek input on day-to-day challenges — many members are solo practitioners who benefit greatly from this kind of peer exchange.

Coordinating Events

- Plan well in advance.
- Involve other members in planning, hosting, and running events.
- Manage all speaker outreach and invitations through the process outlined in Section 5.

Section 4: Technology, Recordings & Zoom Security

Using Technology

- Decide in advance whether you will record a virtual event (in full or in segments) and announce this to attendees at the start.
- Obtain consent from presenters before recording. Members who do not consent may choose not to attend.
- Decide in advance whether AI technology tools will be permitted and communicate this to members.
- Ensure accommodations are available for members with disabilities.
- All recordings are for internal IECA use only and must not be shared on social media, YouTube, or any external platform.
- If you record a presentation, send the link to Cyndi Bohlin at Cyndi@IECAonline.com. She will provide a shareable link for use within your Affinity Group community on the Member Network.

Zoom Account Setup

If you do not already have a professional Zoom account, IECA can set one up for you through the IECA Zoom account. However, if you have an existing professional Zoom account (not the free version), it is generally easier to use your own. An IECA Zoom account requires a separate sign-in email, which many coordinators find more cumbersome.

To request an IECA Zoom account, contact: Cyndi@IECAonline.com

Zoom Link Security

Required: Update Zoom Links Quarterly

To maintain the confidentiality and professionalism of Affinity Group meetings, all Coordinators must update their group's Zoom meeting link at least twice per year.

This ensures:

- Secure access for current IECA members only.
- Protection against unauthorized participation by former members or non-members.
- Continued trust and open dialogue within the group community.

Always share updated Zoom links through the IECA Member Network only. Links must never be shared publicly or on social media.

Section 5: Communications

With Speakers

- Communicate with speakers both before and after every meeting.
- Send a thank-you note to all presenters — especially college admissions representatives — following their visit.

Within the Affinity Group

- Use your Affinity Group Member Network community to communicate with members, send announcements with date, time, and location, and send final reminders before each meeting.
- Create and share an Affinity Group calendar with all members at the start of each year.

Keeping IECA in the Loop

- Notify [Cyndi Bohlin](#) about any events that pertain to IECA membership at large or if any questions arise regarding an event.
- To have your Affinity Group event added to the Member Network calendar and shared in *5 Minute News*, complete the Upcoming Events form at: <https://link.iecaonline.com/upcoming-events>
- Send photos of in-person events and gatherings to Cyndi Bohlin at Cyndi@IECAonline.com to share on IECA's social media accounts.
- Update your Affinity Group Library on the Member Network with any attachments or resources from speakers.

Communication Channels

- All official Affinity Group communication and community conversations must be conducted through the IECA Member Network.
- Each Affinity Group may be provided a designated email account that operates through the Member Network for efficient, transparent management.
- Social media platforms are not appropriate forums for official IECA business or communication.

For training or support, contact Cyndi Bohlin, IECA's Director of Communications, at Cyndi@IECAonline.com.

Section 6: Engaging with Institutional Partners

IECA is committed to sustaining the momentum of its Affinity Groups in a way that honors our relationships with university partners and ensures a consistent, high-quality experience for all participants. Affinity group leaders should comply with the [Guidelines for Online Events and Webinars with Institutional and School Partners](#) when planning and executing any activity with university partners.

When to Contact IECA First

Before contacting any university or program representative, please reach out to Cyndi Bohlin at Cyndi@iecaonline.com if:

- Your event may be relevant to the wider IECA community beyond your Affinity Group. For example, a Rural/Small Town Affinity Group presentation on the STARS College Network.
- You are unsure whether your event is better suited to a national College Conversation or another type of gathering.

Note: In some cases, IECA and the College Conversations team may work with you to expand your event to a broader audience so that all interested members can participate.

5-Step Outreach Coordination Process

To protect our university relationships and ensure no partner feels over-contacted, please follow these steps before extending any invitation:

Step	Action Required
Step 1	Check the upcoming events calendar at https://link.iecaonline.com/calendar to identify any potential date or time conflicts.
Step 2	Check the Current Tracking Sheet at https://link.iecaonline.com/tracking-sheet to confirm the institutional contact has not been solicited for an IECA event within the past 3 months.
Step 3	If you identify any conflicts or overlap, reach out to Cyndi Bohlin at Cyndi@IECAOnline.com for guidance before proceeding.
Step 4	Once Steps 1–3 are complete, proceed with your outreach to the institutional representative.
Step 5	Once confirmed, complete the event submission form at https://link.iecaonline.com/upcoming-events immediately so it is added to the calendar and Tracking Sheet.

Important: Events submitted without completing the steps above may not be added to the IECA calendar. Please complete this process first to avoid delays and to protect our shared relationships with institutional partners.

Posting, Promotion & Recordings

- Affinity Group events should be announced and posted only in your specific group forum on the Member Network — not cross-posted broadly or on social media. If you wish to share information about the events with all IECA members, complete the upcoming events form for them to be listed in the event calendar and shared in *5 Minute News*.
- Recordings should be posted in your Affinity Group library on the Member Network.
- If an event is of broad interest to the full IECA community, it may be posted in the IECA-wide library with approval from IECA.
- In all public post-event recaps, clearly distinguish your IECA group role from any solicitations for your individual consulting services.

Email Templates for Institutional Outreach

Use the templates below when communicating with colleges and programs. Minor edits are welcome. For significant changes, consult the College Conversations Liaison (Kate Sonnenberg) at kate@kscollegesuccess.com before sending.

Template 1: Initial Invitation

Subject: Invitation to Participate in IECA's [Affinity Group Name] Meeting

Dear [Name],

On behalf of the [XYZ Affinity Group] of the Independent Educational Consultants Association (IECA), we would like to invite you to present to our group. The [XYZ Affinity Group] is comprised of [#] members and meets as part of our ongoing professional development. We are interested in learning more about colleges and programs and would be thrilled to have [Name of College/Program] speak to our group.

The format typically includes a presentation followed by Q&A with group members. Although you may include additional colleagues from your office, the content should be clearly tailored to this specific audience. If others will be joining, please share their email addresses.

Our group provides the Zoom platform, and sessions are typically held on [Day and Time]. We will moderate questions from our members verbally rather than via chat.

Our members are eager to learn more about [Name of College/Program], and we sincerely hope you can join us! Thank you for your consideration.

[Your Name]

[Title: Affinity Group Coordinator]

Template 2: Confirmation Email

Subject: Presentation to [Affinity Group Name] – [Name of College/Program]

Dear [Name],

Thank you for agreeing to present to the [Affinity Group Name] on [Date] at [Time].

I am attaching a document with the topics our members most frequently ask about, which we would love for you to cover during your presentation.

I will send you the Zoom link on the Friday before the event. Please plan to log in about 10 minutes early so we can do a quick audio and video check.

In the meantime, could you please share your cell phone number (in case of technical issues) and a short bio for your introduction?

We are really looking forward to learning more about [College/Program Name].

[Your Name]

[Title: Affinity Group Coordinator]

Template 3: Thank You Email

Subject: Thank you!

Dear [Name],

Thank you for joining the IECA [Affinity Group Name] and presenting on [Name of College/Program].

We appreciated the opportunity to learn more about [Name of College/Program]. Your presentation helped us better understand the application process and what type of students will thrive there.

[Consider adding something personal, for example: "I loved learning about your maker space and look forward to telling my students about it."]

We are so grateful for your time. Thank you again!

Warmly,

[Your Name]

[Title: Affinity Group Coordinator]

Introducing Presenters at the Start of a Meeting

- Welcome attendees and acknowledge the presenting institution.
- If the meeting is being recorded, announce this at the start and remind members not to share the recording outside of IECA membership.
- Advise that the chat will be disabled during the presentation and re-enabled during Q&A.
- Introduce the presenter by full name (confirm pronunciation in advance) and title.

Content Guidance for Hosting Presenters

- Ask presenters to highlight student life, academic programs, admissions, and financial aid.
- Moderate discussion so that presenters remain comfortable and respected throughout.
- Keep questions relevant and constructive — avoid divisive topics or questions easily found on the college website.
- Avoid asking presenters to repeat information that will be available in the recording.
- Ask presenters if they are willing to share their contact information for follow-up questions.
- Where possible, use two hosts: one to monitor the chat and one to ask questions.
- Manage time carefully and always end on schedule (typically one hour).
- Prepare a clear, engaging closing question such as: "What should families remember most about your school?" or "What is your favorite campus tradition?"

Section 7: Roles, Responsibilities & Volunteers

Affinity Group Coordinator Responsibilities

- Meet on a recurring basis with co-coordinators to discuss meetings, speakers, and group concerns.
- Remind members of IECA standards and practices when appropriate.
- Develop opportunities for volunteers and identify potential future leaders.
- Serve as the record keeper for meeting topics and issues to escalate to the IECA office.
- Plan monthly virtual meetings and maintain a consistent schedule.
- Mentor potential future leaders to ensure smooth transitions.

Building Volunteer Support

Encouraging members to take on specific roles increases involvement and builds a pipeline of future leaders.

Potential volunteer opportunities include:

- Publicity — writing *Insights* articles, taking photos, submitting to *5 Minute News*.
- Communications — managing correspondence within the group and with the IECA office.
- Speaker Outreach — contacting college representatives and other professionals.
- Supporting IECA initiatives as they arise.

Recognizing Volunteers

- Submit active volunteers' names to IECA staff to be recognized during April's Volunteer Appreciation Month.
- Provide recognition within the group to those who have supported group efforts throughout the year.
- Share your group's successes with IECA staff.

Section 8: Keeping the Momentum Going

- Reflect on your Affinity Group's successes and communicate achievements with members regularly.
- Provide recognition to members who have supported group efforts throughout the year.
- Share your successes with IECA staff.
- Organize a year-end discussion to reflect on activities and set goals for the upcoming year.
- Plan an Affinity Group meetup during IECA's Annual Conference by scheduling with IECA staff — options include dedicated roundtables or breakfast tables.

Section 9: Quick Reference

Key Contacts

Contact	Role & Email
Sue DePra, Deputy Executive Director	Support for Affinity Group leadership questions, approvals, and escalations. Sue@IECAonline.com
Cyndi Bohlin, Director of Communications	<i>5 Minute News, Insights</i> , upcoming events, photos for social media, and webinar recordings. Cyndi@iecaonline.com

Key Links & Forms

Resource	Link
Upcoming Events Form (Calendar & <i>5 Minute News</i>)	https://link.iecaonline.com/upcoming-events
Request New Affinity Group Form	https://link.iecaonline.com/new-affinity-group
IECA Vendor & Member Benefits Information	https://www.iecaonline.com/resources/vendors/

<i>Insights</i> Article Submissions	Insights@iecaonline.com
Recording Submissions	Cyndi@iecaonline.com

Thank you for taking on this important volunteer role.

Affinity Groups make a positive impact on IECA
and on the professional community we serve.