



INDEPENDENT EDUCATIONAL
CONSULTANTS ASSOCIATION

2026–2027 Regional Group Chair Handbook

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

Welcome, Regional Group Chair!

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

This handbook consolidates everything you need to know into one easy-to-reference guide. Whether you are brand new to the role or a returning leader, you will find practical guidance on leadership, meetings, communications, finances, compliance, and more.

You are not alone. IECA staff members are always available to help.

Section 1: Leadership Structure & Rotation

Leadership Roles

Each Regional Group is led by a Chair and Vice Chair. These individuals serve as the primary contacts for the group and are listed on the IECA Member Network.

- Leadership may only be held by a Professional or Associate IECA member.
- Associate member chairs are encouraged to pursue Professional membership as soon as they are eligible.
- Leadership titles should remain consistent nationally: Regional Group Chair, Vice Chair, and Ex-Officio Chair.

Leadership Term & Rotation

Leadership roles rotate every year to ensure opportunities remain open to all members and to keep groups in a constant state of renewal. Terms are staggered for continuity:

Role	Term Description
Vice Chair	One year — learns the role and supports the Chair
Chair	One year — leads the group as primary contact
Ex-Officio Chair	One year — mentors new leadership and provides continuity

Important Deadline: Current Chairs and Vice Chairs are responsible for identifying their successors by the IECA Annual Conference (held in the spring) to ensure recognition and enrollment in the June RG Leader Training.

All materials must be handed over to the incoming Chair prior to June 1st.

Selecting New Leadership

- After identifying candidates, submit their names to IECA staff to confirm they are members in good standing.
- Once confirmed, announce the new Vice Chair to your group and notify IECA staff.
- If you have difficulty finding a successor, reach out to IECA's Vice President for Membership & Engagement or IECA staff for assistance.

Roles & Responsibilities

Charge for All Regional Groups

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

- What unique value can your Regional Group offer that best meets the needs of your local members?
- What trends are shaping the work of IECs in your area?
- Regional Group events should center on conversations with representatives of local institutions or regional admissions contacts and are encouraged to include in-person gatherings that build local community.
- Avoid scheduling conflicts with IECA-wide events such as Professional and Associate & Student Virtual Roundtables and College Conversations.

Regional Group Chair

- Lead the group within the framework of IECA's Regional Group Leadership Onboarding Training.
- Meet regularly with the Vice Chair to discuss meetings, speakers, and group concerns.
- Remind members of IECA standards and practices when appropriate.
- Develop volunteer opportunities and identify potential future leaders.

Regional Group Vice Chair

- Chair the welcome committee for new members.
- Meet regularly with the Chair to discuss meetings, speakers, and group concerns.
- Handle some correspondence from admissions officers and vendors.
- Serve as record keeper for meeting topics, issues, and items to escalate to IECA.
- Help plan virtual meetings and write or suggest the annual interest survey.
- Participate in the formal April meeting with the Chair and Ex-Officio to nominate new leadership.

Ex-Officio Chair

- Provide continuity and institutional knowledge during the leadership transition.
- Mentor the incoming Chair and Vice Chair.
- Meet with the Chair and Vice Chair as needed to discuss meetings, speakers, group concerns, and new leadership planning.

Section 2: Group Membership

Who Can Join

- Regional Groups are open to all IECA Professional, Associate, and Student members.
- Non-members may attend as temporary guests for up to three meetings or one year, whichever comes first. After this grace period, they must join IECA to continue participating.
 - Notify IECA staff when a guest attends their first meeting and again at their last/third meeting.
- Emeritus members may be invited to events but cannot participate in Member Network communities.
- Members whose IECA membership has lapsed will be removed from the group community on the Member Network.

Member Placement

- Members are classified into Regional Groups based on their primary registered address.
- If no local group exists, members may join the next nearest group, even if out of state.
- Members with multi-location practices may choose their home address as their primary address.
- Members may join additional Regional Groups if they anticipate being able to attend the majority of meetings.
- IECA membership does not require participation in a Regional Group.

Section 3: Planning & Running Meetings

Meeting Frequency

- Regional Groups must meet at least three times per year. Most groups meet monthly.
- Consistency is key — choose a regular day and time (e.g., the second Tuesday of each month) so members can plan accordingly.
- Meetings may be held in person, virtually, or a combination of both.

Meeting Ideas & Topics

Consider a variety of formats and topics to keep your group engaged:

- Educational workshops led by members or outside professionals (therapists, test prep tutors, financial aid experts, etc.).
- Roundtable discussions on pressing industry topics.
- "Share results" sessions or best practices exchanges.
- End-of-season debriefs and goal-setting sessions.
- Social events such as a professional cocktail hour or coffee meetup.
- College and school admissions representative presentations and campus visits or field trips to local colleges, schools, or programs.
- Networking-only meetings — sometimes unstructured time is the most valuable.

Tip: Be aware of your members' specialties. Not all members are college IECs — your group may include school (K-12), graduate, or therapeutic consultants. Plan offerings that consider the full range of your group's expertise.

Venue Options

- A member's office or home.
- A local school, college, or program site.
- A restaurant or coffee shop with a meeting space.
- Virtual (Zoom or similar platform).

Technology & Recording

- Decide in advance whether you will record any portion of a meeting and announce this to attendees.
- Obtain presenter consent before recording.
- Decide whether AI tools will be permitted and communicate this to members in advance.
- 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, upload it to your Regional Group library on the IECA Member Network, and, if it is relevant to all IECA members, send the link to Cyndi Bohlin at Cyndi@IECAonline.com. She will then add it to the Resource Library for all members.
- Accommodations must be made for members with disabilities.

Zoom & Meeting Access Security

To protect the privacy and integrity of group meetings, all Regional Group Chairs are expected to update their group's Zoom meeting link at least twice per year. This ensures:

- Only current IECA members can access meetings.
- Former members or unauthorized individuals cannot join recurring sessions.
- Meetings remain safe, professional, and confidential.

Security Reminder: Zoom links must be shared only through the IECA Member Network — within your Regional Group community. Links should never be posted publicly or distributed outside of IECA membership.

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

Section 4: Communications

Primary Communication Channel

- All official Regional Group communication and community conversations must be conducted through the IECA Member Network.
- Social media and other platforms are not appropriate forums for official IECA business.
- Each Regional Group has a designated email account that operates through the Member Network for efficient, transparent management.
 - To set up a new community or for training on using the Member Network, contact IECA staff.

Publicizing Events

To have your Regional Group meetings and events added to the IECA events calendar and included in the *5 Minute News*, so the information is available to all IECA members:

- Complete the Upcoming Events form at: <https://link.iecaonline.com/upcoming-events>
- Submit event details as early as possible to ensure timely posting.
- Use your Member Network community to send announcements with date, time, and location; collect RSVPs; and send final reminders before each meeting.

Keeping IECA Informed

- Notify IECA staff about any events that pertain to IECA membership at large, involve a deposit or contract, or raise any questions.
- Inform IECA staff of non-IECA member attendees at both their first and third meeting.
- Send photos of in-person events and gatherings to Cyndi Bohlin at Cyndi@IECAonline.com to share on IECA's social media accounts.
- Upload speaker resources and attachments to your Regional Group Library on the Member Network.
- Contact IECA staff early when planning any symposium or tour.

Section 5: Finances & Liability

Financial Rules

Key Rule: Regional Groups may not maintain their own bank account, per IRS regulations. Groups also may not incur debt or maintain a fund balance. If advance funding is needed for any event, contact IECA staff.

- All events should be structured as cost-share events/break even. Example: paying for your own meal at a happy hour meet up.
- IECA will not reimburse Regional Groups for refreshments or incidental expenses.
- If a group member advances a deposit personally (from a personal or business account), participants should pay their share to offset all associated costs.

Requesting a Deposit from IECA

If IECA needs to sign a contract or advance a deposit on behalf of your group, submit the appropriate request form to IECA staff:

- Event Space: Complete the [Request for Event Space Rental Deposit form](#)
- Bus Rental: Complete the [Request for Bus Rental Deposit form](#)

Your request must include:

- A copy of the contract.
- An explanation of how the advance will be repaid.
- A simple event budget including: location, number of attendees, per-person cost, and total expenses.

Liability Overview

Because Regional Groups operate under IECA's auspices and events are publicized through IECA channels, IECA assumes some liability. IECA holds a \$2 million liability policy covering official events.

Venue Type	Liability Coverage
College/school campus tours	The institution assumes liability (you are an invited guest).
Restaurant or public facility	The facility's own policy is primary. IECA proof of insurance available on request.
Member's office	The member's own liability policy covers the space.

Member's home	Homeowner's insurance typically covers community-building gatherings (no commerce involved). Host should verify their policy.
Rented facilities	IECA may need to secure a policy rider. Contact IECA staff.

Gifts to Vendors & Speakers

- Gifts (flowers, gift cards, etc.) should not be given to vendors, admissions representatives, or other presenters.
- If your group wishes to buy a presenter's lunch, attendees may split the cost individually. This is not required or expected.

Section 6: Campus Tours & Events

Option 1: Small Local Tours

- Most groups arrange drive-in or public transportation events due to the high cost of buses.
- A small local tour may be arranged without involving the IECA office.
- In this case, IECA will not sign contracts, forward deposits, or assume liability.
- If you need IECA to sign a contract or forward a deposit for a bus, complete the [Request for Bus Rental Deposit form](#) and submit to IECA staff.
- Only contract with bus companies that carry their own insurance policy (primary coverage).

Option 2: Formal Large Group Tours

- There is no minimum number of attendees for a formal tour; however, buses should only be used if at least 35 attendees are expected.
- Consider opening the tour to IECA members beyond your region to reach attendance goals.

To arrange a formal IECA group tour:

1. Complete the [IECA Regional Groups Campus Tour Proposal form](#) and submit to IECA staff.
2. Upon approval, IECA staff sets the fee and builds out a registration system.
3. IECA approves the budget, reviews and signs contracts, announces the tour, and manages registration.

For formal tours:

- The Regional Group serves as tour host, with the event open to all IECA members.
- Registration priority is given to Regional Group members for the first several days.
- Waitlisted non-Regional Group members are pulled at a pre-set date on a space-available basis.
- All fees are set by IECA.

Section 7: Building Volunteer Support

Why Volunteers Matter

Distributing responsibilities across your group reduces burnout, increases member engagement, and builds a pipeline of future leaders. Encourage members to take on specific volunteer roles.

Volunteer Opportunities

- Publicity — writing *Insights* articles, taking photos, submitting info for *5 Minute News*.
- Communications — managing correspondence within the group and with the IECA office.
- Speaker Outreach — contacting college representatives and other professionals.
- Event Coordinator — organizing a single in-person event.
- Tour/Symposium Coordinator — leading logistical planning for a group tour.
- Annual Conference Support — assisting if the conference is held in your region.

Recognizing Volunteers

- Submit active volunteers' names to IECA staff to be recognized during April's Volunteer Appreciation Month.
- Recognize members who have organized tours, meetings, or supported group efforts within your community.
- Share your group's successes with IECA staff.

Resources for Building Your Team

- The Regional Group Leadership Library includes sample volunteer job forms, event ideas, and leadership resources.
- IECA staff can forward a list of potential volunteers from the annual IECA Volunteer Survey upon request.

Section 8: Starting a New Regional Group

If you are in the process of forming a new Regional Group, follow these guidelines:

- Define the geographic region your group will cover — consider how far members are willing to travel and whether the group will meet in person, virtually, or both.
- A minimum of 5-10 dedicated members is recommended for a successful group.
- Consult with IECA staff to confirm that your proposed region is not already covered by an existing group. If overlap exists, IECA will facilitate the conversation.
- New groups will have their initial leadership term approved by IECA staff.

Section 9: Quick Reference & Key Contacts

Key Forms & Links

Form / Resource	Link
Upcoming Events Form (calendar & 5 Minute News)	https://www.iecaonline.com/education-events/upcoming-events/
Event Tracking Sheet	https://link.iecaonline.com/tracking-sheet
Request for Event Space Rental Deposit	https://link.iecaonline.com/regional-group-event-space
Request for Bus Rental Deposit	https://link.iecaonline.com/regional-group-bus-rental
Regional Group Chair Library	https://network.iecaonline.com/communities/community-home/librarydocuments
Post-event photos	Cyndi@IECAonline.com
Recording submissions	Cyndi@IECAonline.com

Annual Calendar at a Glance

Time of Year	Action Required
Ongoing	Update Zoom link at least twice a year
Monthly	Report guest attendees to IECA staff
April	Chair, Vice Chair, and Ex-Officio meet to nominate new leadership; submit volunteer names for recognition
By Annual Conference (Spring)	Identify successors for Chair and Vice Chair
June 1	Hand over all materials to incoming Chair
June	New Chair and Vice Chair attend IECA RG Chair Training
Year-round	Submit events to calendar; keep Member Network updated; communicate through Member Network only

Section 10: Engaging with College & Institutional Partners

IECA is committed to sustaining the momentum of its Regional Groups in a way that honors our relationships with university partners and ensures a consistent, high-quality experience for all participants. This section provides guidance on creating successful events, coordinating outreach, and representing IECA with a consistent voice. Regional 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 Regional Group.
- Your event warrants a non-regional representative (e.g., a senior-level admissions rep speaking on national trends).
- 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

- Regional 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 in *5 Minute News*.

- Recordings should be posted in your Regional 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 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 [Regional Group Name] Meeting

Dear [Name],

On behalf of the [XYZ Regional Group] of the Independent Educational Consultants Association (IECA), we would like to invite you to present to our group. The [XYZ Regional 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: Regional Group Chair]

Template 2: Confirmation Email

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

Dear [Name],

Thank you for agreeing to present to the [Regional 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 looking forward to learning more about [College/Program Name].

[Your Name]

[Title: Regional Group Chair]

Template 3: Thank You Email

Subject: Thank you!

Dear [Name],

Thank you for joining the IECA [Regional 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: Regional Group Chair]

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?"

Thank you for leading your Regional Group.

Your work builds community, fosters collaboration,
and strengthens the entire IECA membership.