

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

56th Annual NAEPC Advanced Estate Planning Strategies Conference

Council Executive Sharing Session Table Conversation Topics

November 5, 2019 · 8:00 am - 12:00 pm

Meeting Location: TBD

Lauren Smigelski & Kris Wolfe, Co-Facilitators

Relationships, Strategies, and Partnerships

During this discussion we will dive into how best to build relationships with board members and vendors, dealing with the tricky situations that sometimes pop up with these individuals, and talk a bit about how to help your board members maximize their time and capabilities while they're serving your organization - all of which will truly help you become your board's most valuable strategic partner. Time permitting, we'll also talk about how we help ourselves see the "big picture".

Your Board is Your Friend: Best Practices for Board Meetings and Board Interaction

Our leaders know that running an efficient board meeting is sometimes hard. Many voices and opinions, limited time and those darn Robert's Rules! During this discussion we'll talk about helping our leaders run efficient board meetings, the best frequency for meetings, how we as staff can best prepare for a board meeting beyond the packets, and best practices with regard to orientation and onboarding new board members.

Dancing Backwards in High Heels - On-the-Spot Event Problem Solving

The lights went out, the wind blew your sign away, and the kitchen ran out of chicken. This discussion will address preparing for what could go wrong *before it does go wrong*, emergency preparedness, and problem solving / practical responses when you have just a moment to absorb the situation and respond.

No One Ever Grows Up Wanting to be an Association Executive, So What's the Profession All About?

We are all called upon to be many things to many people - so, how do we make time to focus on ourselves and our professional skills and skill development? This session will brainstorm ways to make yourself more valuable to your council or clients, making an "ask" for things like fee increases or large expenses, defining a scope of services, saying no (and meaning it!), disconnecting, and business considerations like when it's time to take the next step to office space, hiring new employees, etc.



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Potpourri of Concepts and New Ideas

This one is a free-for-all. We'll address your questions or needs during this breakout. Favorite or best subject line? Best leadership book? Time-saving tips? How to keep going when it gets tough? We've got you covered!

Creative EPC Membership Strategies... and a Little of the Boring Stuff Too!

Membership associations are all about the members, right? This roundtable will dig into Council membership specifically: dues structure, timing, renewal and process; types and categories; onboarding and through the first year; other programs like mentorship or NextGen; recruitment and incentives, etc. We'll also address a staff member's role in membership recruitment.

If We Can Keep Up with the Kardashians, We Can Certainly Keep up with Technology, Right?

Twitter. Facebook. LinkedIn. Snapchat. Often our board hears these words and immediately decides to "do social media". Let's take some time to dig into using technology in association management, how we can help our boards make good decisions about their association's presence, and also set them up for success (hint: a board can't do it all, nor can a staff member... it's a team effort!) We'll also spend a few minutes talking about managing the personal / professional divide with regard to your own social media presence.

Memorable Events

One minute you're at your regular ol' club hosting a monthly luncheon and the next your board is asking you to turn an airport hangar into a classroom (with a \$500 budget). Let's talk about original, innovative or successful events, how to find the venues, how to fit educational presentations into these unique venues, and how to negotiate these sometimes difficult contracts.



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- 8:00 AM Call to Order - Smigelski & Wolfe
- One-Minute Introduction & Ice Breaker
- Council, Length of Service, Type of Arrangement (management firm, sole practitioner, etc)*
- What is your best moment as an association executive?*
- Share your most ridiculous attendee/member comment.*
- 8:30 AM NAEPC Benefits, Programs and Services Review - Austin-Carney & Butterfield
- 9:00 AM Table Conversation #1
- 9:30 AM Report from Table Conversation #1
- 9:45 AM In-Room Conversation Break
- 10:00 AM Table Conversation #2
- 10:30 AM Report from Table Conversation #2
- 10:45 AM Table Conversation #3
- 11:15 AM Report from Table Conversation #3
- 11:30 AM Hot Potato Wrap-Up
- Please share a burning question or comment about the day.*
- 12:00 PM Lunch with Exhibitors (Optional)

