

Conference Notes



A word about the session notes:

The information shared below is a combination of the sharing sessions hosted during three [Regional Leadership Day](#) Conference programs held June 2019 in Atlanta, GA, Bergen County, NJ, and Denver, CO. All sessions were combined into one document.

Hot Topic #1 · Leadership that Cares

HOW DOES YOUR COUNCIL CHOOSE ITS LEADERSHIP AND COMMITTEE PARTICIPANTS?

- In the absence of term limits, some councils “recycle” board members by allowing them to serve again
- Recruitment by board
- Monitor attendance and invite based on participation
- Attendance/ interest in serving / discipline
- Ask for committee service immediately upon joining

COMPOSITION AND PROGRESSION

- For some councils every board member will become an officer
- One council present noted that they only have directors, no officers or committees
- 8 board members – 4 on the executive committee; have a succession plan where everyone on the board moves up through the chairs
- 3 officers only who represent membership, programming and president
- 9 member board with 5 officers, no progression except VP to president – treasurer serves extended term
- 5 officers and other directors who also serve as chairs of important committees
- Sergeant-at-arms is first spot and then one moves up through remaining chairs
- 4 officers, including a combined secretary/treasurer position

BOARD MEETINGS AND HOSTING METHOD

- Once a year to discuss potential board members
- 3 times a year
- Before or after every other meeting
- Just before dinner meeting plus an organizational dinner meeting to plan for upcoming year
- 1 hour before regular events
- Separately for planning purposes – on a calendar year
- Once a year; officers are in contact with each other as-needed

- 4 times per year and a whole and twice as an executive committee
- 1 longer meeting plus 2 pre-membership meetings
- 4 to review financials, on same day as membership meeting
- Monthly during active season
- Undetermined number

Sub-Topic · Other Board Ideas

- Offer meetings via teleconference to make them available to those who cannot attend in-person
- [Consent agenda format](#) keeps meetings efficient

Sub-Topic · Sample Committees

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|--|------------------|
| • AEP® Committee | • Nominating |
| • Community Outreach | • Programming |
| • Emerging Planners (focus on younger members) | • Program/Social |
| • Golf Outing Committee | • Social |
| • Membership | • Sponsorship |
| • New Member | • Welcoming |

Hot Topic #2 · Membership: Changes, Growth & Retention

**DOES YOUR COUNCIL HAVE A MEMBERSHIP COMMITTEE?
IF YES, PLEASE DESCRIBE THEIR DUTIES AND YEARLY TIMELINE.**

- Mix of councils with and without this committee
- In some councils, membership committee does not recruit members but rather is the body that reviews and accepts or rejects applications
- In the absence of a formal committee, the board often serves as the membership recruitment team

HAVE THE DISCIPLINES YOUR COUNCIL ADMITS TO MEMBERSHIP CHANGED IN RECENT YEARS IN RESPONSE TO THE CHANGING LANDSCAPE OF ESTATE PLANNING?

- Many councils are mid-review of their bylaws to address this question
- Enrolled Agents
- Philanthropic professionals
- Wrestling with whether to broaden membership and disciplines/designations available for membership
- Appraisers
- Academics
- Realtors (sometimes as associate members)
- Emerging professionals group for those who may not otherwise qualify due to experience
- Family dynamics/family governance/behaviorists
- Consider combining some categories like trust officers into wealth managers
- Case by case basis (no restriction or policies to anyone applying) – allowed funeral home owner and volunteer chair of a local foundation to join
- Traditional as full members, non-voting associate members for any professional that are close to estate planning that can only hold one position on the board, which is equivalent to a greeter
- Allied professionals for those who are not otherwise qualified after questioning whether broadening dilutes the professionalism of the group
- Professional fiduciary
- Valuation, planned giving/development
- Membership not available to those who are “selling” something
- Emerging professional classification gives 36 months of membership before one can become a full member

Messaging is important!
If it looks like someone cannot apply,
they will not apply

SUCCESSFUL MEMBERSHIP RECRUITMENT CAMPAIGNS

- Motivate seasoned members to engage younger people in their respective firms
- Gift cards for members who recruit new members
- Allow a free guest to one of the council meetings
- 2 meetings allow for guests and annual meeting is open and free to guests
- Focus on the networking aspects of membership during recruitment and within outreach messaging
- Discipline-specific campaigns
- “Old fashioned” recruiting
- Member/Guest events

HOW HAS YOUR COUNCIL SUCCESSFULLY REACHED YOUNGER PROFESSIONALS WHO HAVE BECOME MEMBERS?

- Commit to it!
- Open dialogue with younger individuals asking the question: What would the council look like if it were created today?
- Reviewing local “30 under 30” or similar lists and inviting attendance
- Create relationships with local professors, offer complimentary membership and encourage these individuals to participate, share information about the council, and invite guests to attend
- Emerging professionals / NextGen sub-groups and events
- Ask and encourage members to bring NextGen guests to council events
- Partner with local community foundation to host a young professional’s gathering
- Use sponsorship income to support scholarship program
- Mentorship program (example: [EPC Cleveland’s Guidestar Program](#))
- “Drop in” events that are inexpensive and easily-accessible at casual locations (example: rooftop drinks in a desirable venue)
- Board invitation

Ensure membership is available to younger individuals by implementing Junior or Student classifications if Regular membership has an experience requirement associated with it

HOW HAS YOUR COUNCIL SUCCESSFULLY KEPT OLDER MEMBERS ENGAGED?

- Lifetime/emeritus membership – member for at least 25 years and 65 years of age or older
- [Nominate for AEP® designation](#)
- Include as mentors
- Socials
- “Oath” to continue attending after one has retired from board service
- Legacy awards for service or commitment to the professional
- Personal outreach (applies to all members)
- Milestone awards

Hot Topic #3 · Nurturing Engaged Members

IS YOUR COUNCIL SURVEYING ITS MEMBERSHIP? WHAT DOES THE BOARD DO WITH THE SURVEY RESULTS?

- Many councils reported surveying their members on topics of importance like meeting frequency and format, programming topics, etc.
- Methods for surveying members varied from electronic using a service like [SurveyMonkey.com](#) to paper at meetings

WAYS TO GROW MEETING/EVENT ATTENDANCE OR MAKE MEETINGS “FUN”

- Breakfast meetings
- Cut back on the number of meetings to increase attendance at the ones you have
- Meetings at a nice venue and serve alcohol
- Make sure programming touches all disciplines
- Focus on the value of networking, add icebreakers to meetings so people get to know one another outside of the traditional details
- Give time for attendees to talk about what is new in their personal or professional lives
- Right balance of networking and education
- Open each meeting with a review of the council’s purpose and ask members to get to know one another
- Fun fact about oneself for new members, guests, or anyone with a birthday that month
- Fun activities like “people bingo” or “guess who I am”
- Create an experience
- Place “toys” on the table to give attendees something to fiddle with during the event, which sometimes increases retention of the information being heard
- Electronic mid-meeting surveys using an online tool to keep members interested
- Steadied meeting date and time has increased attendance

STANDARDS BY WHICH NEW MEMBERS ARE WELCOMED

- New member ribbon
- Interaction with welcoming committee
- Complimentary drink ticket
- Personal introduction to key council contacts
- Public acknowledgment / introduction
- Must wear ribbon until a list of tasks has been completed (be a greeter at one meeting, introduce yourself to ten members, sign up for a committee or task force, etc)
- Badge recognition
- Newsletter profile
- Immediate welcome letter and regular outreach by letter or personal call through first year of membership

HOW ARE MEMBER MILESTONES RECOGNIZED? DOES YOUR COUNCIL HAVE MEMBER AWARDS?

- Acknowledgment of years of membership

No join date? No problem!
As the records of most councils pre-date electronic management, simply ask your members when they joined. Most will be able to give an estimate suitable for tracking.

HOW DO YOU ENCOURAGE NETWORKING AMONG MEMBERS?

- Ask members to share professional achievements publicly
- Ice breakers
- Pass around a bag for those who may want to set up an informal coffee get together – pull names to create pairings

Hot Topic #4 · Operations Struggles

HOW IS YOUR COUNCIL HANDLING ITS MOST IMPORTANT LOGISTICS LIKE PAYMENTS, RSVPS, DATABASE MANAGEMENT, HISTORICAL DOCUMENTS, RECORD RETENTION, ETC?

- Minority have a paid staff executive
 - Majority charge one time annual membership fee to keep administrative efforts efficient; others have a low dues amount and accept payments for each meeting
 - Most councils offer CE for their programs; find out what your state regulatory agencies require; consider hiring a council executive for these types of activities
 - Create a [document retention policy](#)
 - Make sure the council is maximizing their [NAEPC-hosted website](#), including event listings, communication feature and payment processing available at levels 3 and 4
- It is advisable to have 6 - 12 months of operating expenses in reserve

Sub-Topic · Sponsorships

- Sponsorships can supplement speaker fees, website charges or general expenses
- The pricing structure and benefits should be formed creatively and with the local market and council size in mind
- Options for programs include:
 - Pre-determined number, all at same financial commitment
 - Unlimited annual sponsorships
 - Tiered options (gold, platinum, silver) – some with exclusivity
 - Website sponsors
 - Event-by-event
 - Corporate
 - None
- Recruitment can be done through the membership, interested parties that have contacted the council, and by contacting various firms in the area

Hot Topic #4 · Programming that Knocks their Socks Off!

SOURCING SPEAKERS

- The better our programming and the speaker, the better the attendance and interest in membership
- Policy that only “expert” presenters who are at least 50 miles away can present
- Local speakers exclusively or mixed in with those from outside of the area
- Find the best speaker and then let them decide upon topic while making sure to cover all disciplines
- Focus is on interesting topics that will really engage members
- Draw from other nearby metro-areas
- Review faculty from other conferences
- Referrals from board or general members
- [Programming resources offered through NAEPC](#)

PROS AND CONS OF PAYING SPEAKERS / FINDING SPEAKERS ON A LIMITED BUDGET

- A mix of paid- vs non-paid speakers
- Some councils have no formal policy and remain flexible
- Don't be afraid to negotiate with potential speakers

MEETING FREQUENCY & EVENT TYPE

- 4 meetings with 1 social
- 6 meetings with speakers presenting for 2 hours – networking starts at 7:15 with coffee
- Quarterly luncheon meetings
- Some councils do not have an April meeting due to tax season
- One breakfast with CE; one luncheon; and then an evening social
- Others have luncheon meetings with 1 social event each year
- 4 meetings; 1 social first week of December
- 3 breakfast; 3 dinner; all with continuing education credit
- 8 luncheons but dropping March meeting; breakfast
- 4 meetings; 1 all-day seminar – no social events
- 4 dinner meetings with continuing education credit; ½ day seminar; periodic breakfast meetings that are purely networking; some social
- 4 dinner meetings with continuing education credit; 1 is a case study; 2 lunches; 1 breakfast and now adding 1 breakfast networking
- 10 meetings a year; all CE; ½ breakfast; ½ dinner
- 9 events a year – all CE; 5 breakfasts; 4 dinners; 1 social in December
- Breakfast and dinner meeting every month; no dinner meeting in December; all are CE; outside speakers for dinners; members speak at the breakfast meetings – breakfast only membership; dinner only membership; or a combination thereof
- 6 to 8 meetings a year combo of breakfast and lunches; no dinner meetings; no CE

- 6 breakfast meetings; CE in all disciplines
- 6 evening meetings; 4 dinner; 2 cocktails all have speakers; 4 breakfast meetings; 4 lunch-n-learns
- 7 meetings with combo of lunch and dinner; file for CE for each speaker
- Free socials

Sub-Topic · Other Meeting Ideas

- Fun events
- Cultural location in city
- Sports events

Sub-Topic · Specific Speakers or Meeting Concepts

- Recommended speakers:
 - Katherine Miree
 - Michael Kitces
 - Ben White
 - Brendon Simmons (genealogy expert)
 - Doug Woodham
 - Jay Adkisson
- Panel of philanthropy experts about how they moved the Civil War diorama
- Estate planning around art and collectibles
- Case study on the impact of one family gift on three institutions
- Probate judge
- Panel discussions
- Presenter from the FBI
- Panel of past council presidents, which also draws a friendly crowd

Closing Question ·

IF YOU COULD ONLY TAKE ONE ITEM FROM TODAY'S MEETING BACK TO YOUR BOARD OF DIRECTORS, WHAT WOULD THAT ITEM BE?

- This is a taste of what you'll experience during [Council Leadership Day](#) (the pre-conference sessions) at the national conference!
- Investigating whether there is an over-saturation of events with a goal of increasing participation
- Revamp the way we're thinking about sponsors
- Junior committee idea or junior membership
- Implement sponsorships and consider increasing membership dues
- Member engagement committee
- Committee structure
- Responsible stewardship of council funds and resources

- More outreach to nearby councils
- Expansion of disciplines acceptable for membership
- Implementation of emerging professionals
- Engagement and recognition of younger professionals to get them more active
- Create a Welcoming Committee
- Scholarships
- Have new members serve as greeters at council events
- Pursue sponsorships for junior or student members
- Importance of a council executive / administrator, who when in place allows a board to focus less on daily administrative operations and more on growth and direction (community foundations being a possible source of administrative support)
- Need to regularly update council's website
- Use the [Council of Excellence application](#) as a planning and self-assessment tool
- Innovative ways to use sponsorships
- Survey members
- Host a case study on an annual basis with emphasis on collaboration
- More focus on networking aspect of council
- Differentiate between continuing education credit and high-quality professional education
- Revisit meeting structure to reengage members, whether programming or recognition
- Host an AEP® informational reception
- Mentoring-panel discussion – networking
- Engagement with one another and follow up, promote [benefits of NAEPC](#)
- Add panel discussion to yearly calendar
- Adding icebreakers to meetings – new members / tenured members – refocusing sponsors
- Working with board to get to know members better, where they are coming from – maybe loosen requirements
- Engagement of new members – mentorship immediately upon joining – survey
- Addition of membership committee
- Items on tables to keep members engaged
- Giving new members a list of tasks to complete before they can remove their “new member” ribbon
- [Programming resources, including the “No Charge” speaker program](#)
- Adding a family dynamics membership category
- Asking one question: if you were to start this EPC today, what would it look like?
- Have executive introduce new members to seasoned members who will provide info about the council
- Annual program by a CPA about what's new in the tax law or changes/traps in insurance, problems with non-guaranteed policy vs non- and what they can do down the road
- Speakers with more presence from outside – revisit no charge program – networking – sprinkle in social events on “off months” to facilitate getting to know one another – identifier on badge with regard to discipline
- Adding [ConferenceAdit](#) service into the council's meetings to make the CE filing process more efficient

Next Steps ·

- Complete the survey (sent via email the day of the event)
- Review your notes
- Schedule a “huddle” with others who attended with you to flush out ideas and to prepare a report / action plan for the council’s board of directors (Attend alone? Block off time within your schedule to do this!)
- Read the session notes when they are released
- Report to the entire board of directors and start implementing new programs or initiatives
- Create a plan to check-in with the leaders of the other councils you met during the event, perhaps even schedule a twice-yearly conference call with the leadership teams of all local councils
- Decide who from the council will attend Council Leadership Day (pre-conference session) held in conjunction with the [56th Annual NAEPC Advanced Estate Planning Strategies Conference](#)