

**COUNCIL LEADERSHIP DAY SHARING SESSION NOTES, COUNCILS BY REGION
NOVEMBER 15, 2017 · 3:15 pm – 5:00 pm**

Council Region: Southeast

Facilitators:	Robert C. Slane & Darcy Houghton
NAEPC Representative:	Maura McLinden
Number of Attendees in Session:	14

Hot Topic #1 · Young Members

- Invite young prospective members as guests to meetings
- Create relationships with local colleges and universities
- Social events sometimes appeal to the younger professional
- Family events
- Roundtable discussions
- Mentorship programs
- Less technical topics of interest to younger members – cyber security, elder abuse, powers of attorney, digital assets, etc

Hot Topic #2 · Engaging the Board & General Membership

- Survey members – find out what they really want
 - One council requires participation in the survey to obtain drink tickets
- Consider changing event time and/or venue for broad appeal – consider ease of access (traffic, location, etc)
- Provide CE credit
- High quality speakers a necessity
- “Neighborhood meetings” within the larger scope of council activities
- Diversity among disciplines noted as important to having an engaged membership
- Discussion of the percentage of board members to general members – varied responses
- Mandate committee service prior to joining the board
- Regular and consistent communication noted as key to engaging members
- Warm invitations to join committee and board
- Board members must have a limited commitment and it must be easy for them to serve – consider doing the bulk of the work in the summer (or “off”) months so commitment is lessened during the programming season
- Great administration is the key to attracting and keeping quality volunteers
- Must keep board meetings efficient and limit the number, some councils hold all board meetings prior to the membership meeting – joining by phone sometimes permitted
- Service on board noted as “prestigious”

Additional Hot Topics ·

- Few councils have active social media presences or initiatives
- Discussion of membership process and requirements – varied from very involved to less so
- Speakers & Topics
 - Probate attorneys / judge
 - Panel of judges
 - Valuation, tax reform, 1041 preparation, UPIA
 - Rights of the reproductive matter provider

Council Region: Northeast

Facilitators: Jeffrey R. Hoenle & Ruth Flynn Raftery
NAEPC Representative: Sharon Chapman
Number of Attendees in Session: 25

Attendees expressed an interest in exploring:

- Diversity and disciplines of membership
- Defining “young”
- Using social media
- Compensating speakers
- Membership engagement
- Maintaining membership
- Sponsorship program & securing sponsors
- Better use of technology
- Encouraging members to attend meetings

Hot Topic #1 · Young Members

- Work to define “young” – students, transitioning from students to practicing professionals, junior / associate / emerging professional members, looking at “young” through the lens of experience rather than age
- “Next Gen” events, 40 and under
- Engage younger members for board and committee service – create connections with seasoned volunteers

Hot Topic #2 · Engaging the Board & General Membership

- Attracting professionals through encouragement of existing members to bring guests and younger members or new associates from their firm
- Allow more junior members to shadow the board
- Social programming
- Streamlining the website – use of social media
- Member spotlights
- Sponsor spotlights
- Survey members – find out what they really want
- Membership appreciation event – awards – recognition of milestones, etc
- New member committee comprised of new members working on projects they have determined to be appropriate
- Consider relaxing the requirements for membership
- Substantive education – programming is what draws members in and keeps them engaged!
- Members asked to nominate a pre-determined number of new members each year

Additional Hot Topics ·

- Insurance / audit / liability
- All councils in the session have sponsors, although they are present in varying ways
- Dues ranged from \$120 - \$400 / year, benefits associated with dues varied

Council Region: Midwest

Facilitators: Richard G. Chalifoux
NAEPC Representative: Susan Austin-Carney
Number of Attendees in Session: 14

Attendees expressed an interest in exploring:

- Next generation of members and staying relevant to them
- Outreach
- Programming with more appeal
- Engaging younger members
- LinkedIn usage
- Programming ideas
- Attracting new members

Hot Topic #1 · Young Members

- Young member-only events
- Varying success reported with regard to attracting younger members; some councils reported organic growth and others are working hard at it
- Encouraging those who are not qualified because of experience restrictions to attend as guests until they meet the threshold for membership
- Have junior and student membership categories
- Partner with local colleges and universities

Hot Topic #2 · Engaging the Board & General Membership

- Social activities exploring one's own city
- Social-only programming
- Using NAEPC webinars as a creative program, follow with a discussion led by local experts/council members
- Bring national speakers to council members
- Host member / guest events
- Highlight "Members in the News"
- Job posting board or service, possibly an opportunity to generate non-dues revenue

Additional Hot Topics ·

- Sponsorship levels and programs varied, but were generally available
- Create the position of social media chair
- GL and D&O insurance recommended
- Board structure and selection process varied among those in attendance
- Create a diversity committee
- Make sure chair of programming committee has been on the board for some period of time
- Appealing programming options
 - Local judge
 - Copyright law topic
 - Monthly tax update presenter; ensure they are a different discipline than the speaker

It was suggested that each attendee return to their board to discuss the conversation of the day and work together to set new goals or priorities for the coming year.

Council Region: Central

Facilitators: M. Elizabeth Brandt & Harvey A. Hutchinson, III
NAEPC Representative: M. Joan McCarthy
Number of Attendees in Session: 20

Attendees expressed an interest in exploring:

- Collaborating on speakers
- Continuity
- Incorporation of Junior / Student membership
- Expanding disciplines appropriate for membership
- Growing membership
- Increasing revenue
- Governance

Hot Topic #1 • Young Members

- Associate membership for those with less than the minimum threshold of experience
- Educational seminar geared toward younger professionals
- Create parameters based on age and/or experience to include as many as possible
- Separate meetings or events just for younger members
- Empower younger members to create their own committee / programming / etc

Hot Topic #2 • Engaging the Board & General Membership

- When creating programming schedule, review 5 years of history, complete schedule early in year
- Officer service often comes after a lengthy period of board service, a significant commitment
- Social events as recruitment tools
- Vary location and scope of events for broad appeal

Additional Hot Topics •

- Speakers can often be secured from local banks or trust firms
- Take on the role of educating all disciplines within the membership on what the other disciplines do
- Topics
 - Legislative updates
 - Digital assets

Council Region: Western

Facilitators:	Jennifer M. Daniel, Larry D. Hoatson, Karen D. Kirchner
NAEPC Representative:	Sarah G. Butterfield
Number of Attendees in Session:	23

Attendees expressed an interest in exploring:

- Diversity – not strong within firms

Hot Topic #1 · Young Members

- Associate memberships are offered to those with less than 5 years of experience and allow for a period of three years to obtain designation/credentials
- Marketing to “sister” organizations, especially for social events, with a goal of increasing younger members
- Separate events for “emerging professionals”

Hot Topic #2 · Engaging the Board & General Membership

- Encourage members to invite guests
- Encourage sponsors to invite guests
- Require board members to first serve on a committee before joining the board
- Keep board active by limiting time commitment – pair meetings up with events, host conference calls
- Having a compensated council executive allows boards to focus on board duties – direction, initiatives, etc

Additional Hot Topics ·

- Target firms that are under-represented or not represented in the membership
- Must be proactive with regard to inviting new members – personal outreach, conversations, campaigns, etc
- Communicate with other councils using the LinkedIn group just for council leaders – speaker ideas, hot topics, etc
- Speakers should address “everyday” topics

Balancing History with Current Needs ·

- Approach carefully
- Full review of designations accepted for membership with a goal of adding new
- Consider “affiliate” membership categories to allow those otherwise not qualified to become active
- Follow the lead of NAEPC