

**COUNCIL LEADERSHIP DAY SHARING SESSION NOTES, COUNCILS BY SIZE
NOVEMBER 15, 2017 · 1:00 pm – 2:45 pm**

Council Size: Extra Small & Small Councils, Session 1

Facilitators: M. Elizabeth Brandt & Harvey A. Hutchinson, III
NAEPC Representative: M. Joan McCarthy
Number of Attendees in Session: 19

Attendees expressed an interest in exploring:

- Strategies to increase membership
- Finding new, young members
- Increasing member engagement
- Collaboration among the various disciplines
- Finding good speakers
- Adding vibrancy to the organization
- Member retention
- Transitioning from older to younger officers
- Growing membership
- Encouraging seasoned members to guide or mentor newer members

Hot Topic #1 · Membership Criteria Review & Increasing Membership

- “Speed dating” events to encourage seasoned members to meet and network with younger members, gauge good matches
- The benefit of luncheon meetings after the 15th of the month to younger members was voiced
- Encouraging members through messaging like “someone in this room can help you, and you can help four people in this room”
- Enforcing guest restrictions (if a person can only come once before becoming a member, enforce it)
- Maintain a “culture of excellence” within the council
- Welcome non-profit organizations to membership
- Work with local universities to draw younger members to the profession and council
- Roughly half of the councils in attendance have a membership committee
- Welcome associate members (examples cited: non-profit professionals, probate court officers)

Hot Topic #2 · Exciting Programming, Speakers and Topics

- An annual meeting on collaboration was noted as being well-received
- Using the NAEPC webinars as creative programming and limit attendance for a feeling of exclusivity
- Alternate meeting times for more appeal

Hot Topic #3 · Involvement with NAEPC

- No discussion

Additional Hot Topics ·

- Securing sponsors was noted as a positive action for those councils that are struggling with finances. Various benefits of sponsorship were heard, including table tents with the sponsor logo, a powerpoint presentation with the logos.
- The hosting of community education seminars
- Supplement in the local business journal for consumer education

Council Size: Extra Small & Small Councils, Session 2

Facilitators: Jennifer M. Daniel, Larry D. Hoatson, Karen D. Kirchner
NAEPC Representative: Sarah G. Butterfield
Number of Attendees in Session: 13

Attendees expressed an interest in exploring:

- Increasing membership and attracting younger members
- Expanding diversity among disciplines
- Staying relevant
- Adding value for members

Hot Topic #1 • Membership Criteria Review & Increasing Membership

- Regular messaging from the council – note from the president, event announcements, etc
- Offer CE and make sure people know about it
- Allow for “other” members who may provide value but not be eligible for regular membership
- Joint meetings with other organizations offer exposure to a new group of potential members
- Membership committee must be a required element of board structure
- Advertise membership availability in local appropriate publications
- Social media, assuming council will commit to regular posts and activity
- Volunteer events may engage a younger member

Hot Topic #2 • Exciting Programming, Speakers and Topics

- Vary meeting times to appeal to different members, as a part of this process do an analysis of where members live and work
- Allow members to determine preferred meeting times
- Survey membership to find out what they want to learn about!
- Meet more often
- Use sponsors to bring in national speakers or people who would otherwise not be available to your council
- Use NAEPC website events functionality to gather questions for your speaker prior to the program
- Perfectly tailored messaging to prospective members – offer a feeling of inclusiveness
- Coordinate with councils in the region to share costs, etc
- “Round Robin” meeting with table topics – encourage members to get to know one another while discussing items of importance

Hot Topic #3 • Involvement with NAEPC

- No discussion

Additional Hot Topics •

- Share the message that meetings are about more than just the education – they are a way to grow one’s own network and a powerful resource not found elsewhere

Council Size: Medium Councils, Session 1

Facilitator: Richard G. Chalifoux
NAEPC Representative: Susan Austin-Carney
Number of Attendees in Session: 17

The facilitator explained the format of the session, noting that there is no correct or incorrect discussion. He encouraged all in attendance to explore other councils and their practices, including a review of their bylaws if doing so can be beneficial.

Attendees expressed an interest in exploring:

- Growing membership
- Finding quality speakers, bringing national speakers
- Best practices
- Finding young members
- Use of excess funds
- Reacting to pending legislation
- Diversifying membership
- Improving the connection with NAEPC
- Sponsorship development
- Increasing meeting attendance
- New ideas and best practices

Hot Topic #1 • Membership Criteria Review & Increasing Membership

- Approximately half of the councils in attendance have a membership committee
- Various processes of reviewing membership applications were reviewed, including having the administrator as the first line of review
- Requirement of having a member sponsor was discussed, including challenges when the applicant doesn't know anyone in the council
- Qualifying credentials were reviewed
- Ongoing review of bylaws and membership qualifications, including the acceptance of "allied" professionals
- One council reduced dues for "sustaining" members
- Emeritus membership to keep seasoned members active and involved
- "Speed networking" or social events noted as popular
- Most councils in attendance have only individual memberships, no opportunities for firm memberships

Hot Topic #2 • Exciting Programming, Speakers and Topics

- Most councils in attendance compensate speakers
- Host roundtable events featuring local talent/professionals
- Lunch and learn events

Hot Topic #3 • Involvement with NAEPC

- Appointing a liaison to NAEPC within the council leadership

Additional Hot Topics •

- The benefit of having strong administrative support was noted as the key to the success of a council
- Sponsorship was addressed, including benefits of support (logos and links on the website, levels of financial support that ranged from \$1,000 to \$5,000)
- LinkedIn and Facebook noted as potential social media outlets

Council Size: Medium Councils, Session 2

Facilitators: Robert C. Slane & Darcy Houghton
NAEPC Representative: Maura McLinden
Number of Attendees in Session: 20

Attendees expressed an interest in exploring:

- Growing membership
- Combatting an aging membership
- Joint events
- Financial impact of professional management vs other ways to manage the work load

Hot Topic #1 • Membership Criteria Review & Increasing Membership

- Regularly review the guidelines for membership
- Bylaw amendments can be time-consuming, but are important
- Some councils have a “cap” on membership
- Student/emerging professional memberships were noted
- Corporate memberships were addressed
- Membership recruitment events with a social feel (wine tasting)

Hot Topic #2 • Exciting Programming, Speakers and Topics

- Members permitted to sponsor guests at events
- Breakfast vs. dinner meetings were debated
- Networking events popular, as are social-only events
- National and noteworthy speakers double as membership recruitment events
- “Study Group” committee featuring local experts on topics
- Webinars as creative programming
- Annual event with judge as a speakers
- Usage of local vs. not local speakers varied, as did compensation for speakers (some councils only offer a donation)
- Meeting frequency varied, as did time of day
- Variety is key to member happiness

Hot Topic #3 • Involvement with NAEPC

- Communicate benefits of membership and relationship at every or specific meetings
- Loop benefits of membership on a presentation at each meeting

Additional Hot Topics •

- Usage of sponsors to offset event or membership costs
- Sponsors sometimes fund specific events
- Dues varied significantly among councils, as did what the dues include (meetings vs. not)

Council Size: Large & Extra Large Councils

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

Attendees expressed an interest in exploring:

- Continuing education credit
- Designations appropriate for membership
- Attracting young members
- New members
- Speaker ideas
- Social media usage and best practices
- Diversity
- Engaging charitable organizations
- Community events
- Financial reserves
- Governance
- Expanding the membership
- Financial planning for EPCs

Hot Topic #1 • Membership Criteria Review & Increasing Membership

- Noted as a common challenge
- Discussion of quality vs. quantity
- Required for the continuity of the council
- Duties of membership committee addressed – vetting applicants, mentorship program, follow up with newer members, invite younger members to participate on committees
- Some councils admitting CAP® designees, planned giving professionals, real estate professionals, valuation professionals, “one-off” designations
- Some councils do not admit undesignated professionals
- Discipline-specific recruitment a best practice, inviting those who are of an under-represented discipline to speak to colleagues about joining successful
- Junior / Associate / Student vs. Full membership
- Diversity committee
- Discount membership as an enticement for under-represented disciplines

Hot Topic #2 • Exciting Programming, Speakers and Topics

- CE credit a draw for members
- Wide variety of topics and a mix of technical vs. non necessary for broad appeal
- Succession planning
- Vet the presentation or presenter
- Make sure the speaker knows the audience
- Advance planning is key – finish programming schedule early!
- Survey members for topic or speaker ideas
- Roundtable meetings, breakfast topics, etc
- Economists of appeal
- NAEPC speaker lists
- Councils varied on local vs. out of town and paid vs. non speakers
- Allow members to present
- Have the programming committee participate in a half-day planning session
- Vary time of day for meetings and events, possibly also host locations for more appeal
- Database speaker history and attendee comments

Hot Topic #3 • Involvement with NAEPC

- Appoint a designated NAEPC-representative to council board
- Encourage AEP® designation