

## **COUNCIL LEADERSHIP DAY SHARING SESSION NOVEMBER 15, 2016**

Council Size: Extra-Large Councils  
Facilitators: Eric Kordsmeier & Michael Orentlich  
Number of Attendees in Session: 17

A round of introductions and an ice breaker took place at the beginning of the session. The group offered a report of what they hope to gain from the session.

A discussion of membership vs active members took place.

A review of dues and what is included in the dues payment took place.

In most cases, guests pay for their meal.

### **COUNCIL LEADERSHIP & MANAGEMENT**

The need for diversity (age, practice, experience, ethnicity, etc) among boards and membership was addressed. Some councils visit law schools and invite students as guests. One council has an event with a panel of experts that helps to cultivate future members, offer support to transitioning students, connect students to internships, and provide support for resume posting.

Communication methods vary widely and include social media (LinkedIn and Facebook), monthly email newsletters, etc.

The group discussed mentoring programs.

### **MEMBERSHIP GROWTH AND RETENTION**

Many ideas were presented, including:

- Discounted membership for young professionals or students
- Discounted membership for more seasoned / retired members
- Enhanced member communication
- Offering continuing education credit
- Mentoring programs
- Emerging professionals group
- "Legacy" presentations
- Themed events with high-caliber speakers
- CE credit prior to social events
- National speakers
- Asking the membership committee to focus on under-represented disciplines
- Meet & greet events to attract younger members
- Email campaigns designed for non-members

### **ACCREDITED ESTATE PLANNER® DESIGNATION**

The attendees discussed how to better engage with the AEP® designation program.

- Participate in the Council Nomination program
- Pay for the 1<sup>st</sup> year dues for members
- Have a leadership gala
- Work with a national board member to nominate qualified people in the council
- Hold an AEP® informational session

## **PROGRAMMING & EVENTS**

Consumer and client events were discussed.

Most councils were in agreement that providing continuing education credit is non-negotiable. Some councils always get speakers from out of town while others allow local talent.

Speaker fees can range from \$500 to over \$10,000, depending on the presenter.

One council uses the NAEPC webinar series as a programming option.

## **FINANCIAL HEALTH**

All councils present in the session allow sponsors. Various levels are offered.

Councils present had anywhere between 6 and 15 months of operating expenses in reserve.

## **BEST IDEAS WRAP-UP**

- Working to attract younger professionals
- Partnering education with networking
- Reaching out to diverse individuals
- Leverage webinars
- AEP® promotion
- Partnership instead of sponsorship
- Diverse topics
- Strategic Planning Committee
- Educational events for public benefit
- A fundamentals series