

COUNCIL LEADERSHIP DAY SHARING SESSION NOVEMBER 15, 2016

Council Size: Medium Councils, Session #2
Facilitators: Michael Panebianco (New Hampshire EPC) & Michael Miranda (Sioux Falls EPC)
Number of Attendees in Session: 27

A round of introductions took place, during which the council officers in attendance also share information with regard to their EPC and the issues they would like to discuss during the session.

- Sponsorship
- Membership structure
- Membership growth
- Recruitment and engagement of younger members
- Organization and structure
- New ideas
- Quality speakers
- How to better integrate NAEPs mission and services into council activities
- Growing the usage of the AEP® designation program

It was noted that the Council of Excellence application is a great way for councils to audit their activities as an EPC.

MEMBERSHIP GROWTH & RETENTION

Some councils require minimum years of practice to join, which causes challenges with the engagement of younger members. Junior and associate memberships were discussed.

Some councils discount their membership during year 1. In addition, some EPCs also provide referral fees for those members who recruit new members.

One council has two different levels of membership – voting- and non-voting. In this case, the non-voting dues are lower.

Some councils are testing social-only events without educational content.

Hudson Valley EPC has created an “Emerging Professionals” committee that is charged with encouraging membership among younger professionals. One EPC has moved some of their meetings to a “hip” location within the city. Using social media (in a managed fashion) was noted as a possibility to engage younger members. Speed networking events were noted as popular and help to facilitate interaction between younger and more seasoned members.

Quality speakers have been noted as providing an opportunity to increase membership.

Some councils provide members that refer new members with financial or other rewards, including recognition at year-end. Member recruitment receptions sometimes take place as do membership drives where council leadership speakers and the drive is promoted to the existing membership.

Most councils allow guests to attend events, although some limit guest attendance, the number of times one can attend as a guest, or the number of guests a member can bring per year. Guest fees generally cover the actual cost of the meal and program.

PROGRAMMING

The group recognized a common theme – high-quality programming is key to attracting and maintaining members.

One EPC limits their signature yearly speaker event to members only.

Meeting times and locations varied among the participants and it was noted that varying times and locations was helpful for member engagement.

Usage of the NAEPC “no charge” speaker program was discussed and favorably received.

Approximately 2/3 of the councils in attendance at the session do not allow members to speak at their events.

The need to provide multi-disciplinary educational content throughout the season was heard.

One council looks to national conferences for speaker ideas.

Most councils present offer continuing education credit, but it was noted that the process can be challenging if the council doesn't have a paid administrator. One attendee noted that “CE is available everywhere”, stating that networking is an important component of the EPC offering.

Several councils have standard programs – “A View from the Hill”, “Annual Economic Update”, etc.

Most councils present strive to offer at least one national speaker per year.

The process of negotiating speaker compensation was addressed.

Hot topics: Alzheimer's vs. dementia (addressed by a physician), elder financial abuse, “Shaking the Trees” presentation with regard to family business succession planning, probate litigation.

Miami EPC offers podcasts for members.

Social vs. technical programming was discussed; approximately half of the EPCs in attendance host social-only events.

The group discussed how many of their members actively participate in meetings – 35% to 50% was standard.

Councils revealed their meeting schedule and include:

- 5 dinners, a new member event and 2 social events
- 4 dinners and a brown bag event schedule
- 4 dinners and an all-day CE meeting

Most councils present do not conduct charitable events although one has a consumer outreach program. Tulsa EPC offers a local non-profit 5 minutes to speak at their meetings.

LEADERSHIP & COUNCIL MANAGEMENT

One EPC has created a “liaison” to NAEPC as a board position. This person serves as an advocate and reports to the local board about activities happening at the national level.

One EPC hosts an “open board meeting” in conjunction with their annual meeting each year.

Most councils employ the “basic” officer positions. Some rely on emeritus members for continuity and institutional memory, others rely on an administrator for this guidance. Most councils have term limits, others do not, and standard terms were either 2 or 3 years.

One EPC does not automatically rotate officers up through the chairs.

Approximately 2/3 of the EPCs in attendance employ committees and involve non-board members in this capacity. In some cases these committees are considered to be the “farm team” for future board members.

Most of the EPCs present do have a paid administrator.

All councils were encouraged to conduct a regular bylaw review.

FINANCIAL HEALTH

Approximately half of the EPCs present have a sponsor for each meeting.

Most of the councils in the session include meals in the annual dues.

All councils present prepare and monitor a yearly budget. Most also receive sponsorship income. Some collect guest fees or event from a signature or joint event.

COMMUNICATION

Most EPCs present are communicating primarily through email and a few use social media for this purpose also.

Some councils present send a hard copy dues statement that includes sponsors, which helps to keep no-dues revenue strong.

Approximately half of the councils in attendance produce a hard copy directory.