

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

Council Size: Small & Extra Small Councils, Session #2  
Facilitators: Frank Campbell, Marcia Campbell, Karen Kirchner (All San Bernardino EPC)  
Number of Attendees in Session: 13

### **MEMBERSHIP, GROWTH & RETENTION**

- Prospects are taken to lunch after they attend
- Focus on diversity, working with HBCU in nearby location
- Try happy hours, focus on less technical and more social programming

### **HOW ARE COUNCILS RECRUITING?**

- Call firms already present in membership and asked for names of up-and-coming professionals within
- Bring a guest and get a \$50 gift card
- \$5 Starbucks card to anyone who brings a guest
- Place council officers at tables throughout the room
- Board member greeters at door, council broke through a “cold” image with new younger committee members – used to be just officers and no committees
- Communicate from podium with info on what council is doing
- Spotlight a member each month
- Member bring a guest at no charge
- Move meeting to a date after the 15<sup>th</sup> to avoid all tax deadlines
- One council has bylaw restrictions and rations industry segments
- Most councils noted being heavy on attorney’s and light on insurance

### **LEADERSHIP & COUNCIL MANAGEMENT**

Purpose – councils shared their purpose for existence

- CE
- Topic
- Networking
- Public outreach with pro-bono

Councils discussed their overall membership focus and disciplines

- Disciplines are expanding as the industry changes and who has a seat at the estate planning “table” changes
- Probate/real estate professionals
- Elder care professionals
- Not as broad as to admit funeral directors
- Appraisers were noted to add value
- Broaden categories of membership to balance program
- Adult health care professionals

### **COMMUNICATIONS**

Best Networking Events/Event ideas heard were:

- Social with questions in a bowl on tables to facilitate interaction & discussion / social only
- Appropriately size room to allow for flow
- Service project
- Free services for veterans near Veteran’s Day
- “CE Day” - 8 hour day for all disciplines CE’s for all

## **MEMBERSHIP GROWTH AND RETENTION**

- Beginning a membership campaign to expand membership
- Idea that all members of council are on the membership committee
- Drive membership through quality programming
- Keep it “front of mind”

*The second half of the day focused on the following topics:*

Programming

Financial management

Dues

Leverage national benefits available to members

Review Council of Excellence guidelines

## **Programs/Speakers**

Some councils allow members to speak, some prohibit doing so

Sharing fee with other councils to bring high-caliber speakers

Comment cards are sometimes used to determine appropriate topics

## *Dues Review*

Riverside: \$350 to add Leimberg/lunch added sponsors

Sioux City: \$150

NY/Rockland County: \$275 > no sponsors

Stanislas County: \$175

Naples: \$175 – dinner

Boulder: \$250 + sponsors

Northwest WA EPC: \$325

Southern Delaware: \$245/4 meetings

## Council of Excellence

- Process was a benefit to the governance and procedures

## Paid Staff

Of the councils represented during the session, approximately half have paid staff.

## **BEST PRACTICES WRAP UP**

- Veteran’s benefits
- Dementia topics
- Offer a case study
- Digital Asset topic
- Probate of Guns topic
- Estate planning for “non human” beneficiaries topic
- Estate planning for reproductive matter
- Motivation
- Benefit of Council of Excellence Award and the ability to use it to “audit” the activities of the EPC
- Sponsorship discussion
- Great prep for duties as president
- Open to industry that is more diverse segments
- Welcoming ideas