

COUNCIL LEADERSHIP DAY SHARING SESSION NOVEMBER 15, 2016

Council Size: Small & Extra Small Councils, Session #1
Facilitators: Beth Larssen & Katti Esp
Number of Attendees in Session: 15

ATTENDEES SHARED THEIR DESIRE TO LEARN/DISCUSS

- Quality speakers
- Growing membership
- Engaging / finding younger members
- Better resources for existing members
- Programming
- Communication among existing members
- Better use of their website

ATTENDEES REVIEWED THE DISCIPLINES / TYPES OF PROFESSIONALS CURRENTLY ADMITTED TO MEMBERSHIP

Attorneys

Financial planners – CFP®s/ChFC®s

Accountants

Trust officers

Insurance professionals (most councils)

Charitable professionals and non-profit leaders (most councils)

One who is moving toward attaining a gateway professional designation

Related professionals like real estate brokers, professional fiduciaries, valuation professionals

MEMBERSHIP GROWTH & RETENTION

A council noted that they admit guests at no charge, which often results in that guest becoming a new member

Quality speakers attract quality new members

Some councils will not allow sponsors to bring a guest from their own firm

The ability to offer continuing education credit was addressed, including the challenging expense to do so

2 councils in attendance offer breakfast meetings, 6 offered lunch meetings and challenges with regard to hosting dinner programs were universally noted among leaders in attendance.

Some councils in attendance include meeting fees in their dues; some did not.

SPEAKERS & PROGRAMMING

Some councils have limitations on who can speak and do not allow members to do so.

The “no charge” speaker benefit as offered by NAEPC was discussed as was using the NAEPC webinar series as a program

BOARD STRUCTURE

Of the councils in attendance, 6 paid a paid professional administrator.

- 9 directors of standard disciplines, 3 years terms, limited by 2 terms
- Steps up to executive committee service
- Board elected, officers chosen from within
- 7 year term

Boards often meet before meetings, which can be more effective than an off-meeting solution

2 councils have appointed a liaison to NAEPC

The need for board job descriptions was heard.

Diversity among the board was discussed.

RESOURCES

“Family Dynamics and Money”

NAEPC “Social in a Box”, which provides councils with an opportunity to host an AEP® informational reception

Hosting a meeting at a non-profit office once per year

Evaluation of council and its activities

Job Descriptions (contact Katti Esp)