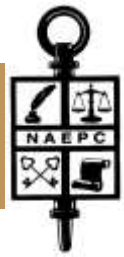


# Learning Pod Notes



## Operations Checklist

Goal setting for chapters:

- Build strong board
- Membership
  - o Over-weighted membership – too many attorneys, CPAs, insurance, etc.
  - o Restricting membership in certain categories
- Revenue
  - o Avoid stagnation
  - o Sponsorship
    - Levels of sponsorship helps raise money
    - Sponsorship for programs are key to offsetting costs
    - Question re: requirements for sponsors – levels and costs
    - Guidelines for who can speak (i.e. relationship between sponsors and members)
  - o New events to increase younger generation interest/involvement
- Education
  - o Paying speakers / top level speakers
  - o CE credits – member needs / survey to see if there is substance to the topics delivered
- Administrative roles for chapter
- Organizational meetings at the beginning of the associations calendar year
- Who writes up / keeps the books and records
  - o Get a member with the skill
  - o Get a management firm
- As Board Member / President of the Association...
  - o What's your focus?
  - o What tasks do you face as a new board member or President?
    - Updating bylaws
  - o Quorum requirements
    - Percentages per professional group
  - o Past presidents get to recruit new board members
  - o Identifying new leaders
- Organizing for the year – content of programs and speakers (content drives membership)
  - o Get top-level speakers
  - o NAEPC can provide speakers – see website
  - o Establish an annual or event theme with specific topics/speakers (may limit your speaker resources)

Council Leadership Day – November 6, 2018

55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

- Bylaws – update bylaws
- AEP
  - Are there programs to nominate AEPs?
  - Social-in-a-box – to introduce potential members to AEPs and drive membership
  - Introduce AEPs at yearly meetings
  - Lower membership fee for AEPs
  - Encourage associate / emerging members (the younger members)

Suggestion: have a NAEPC board liaison available to help councils with leadership issues.