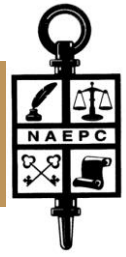


Session Notes



Regional Leadership Day 2017 Council Sharing Session
Orlando, Florida

Councils Represented

Baltimore EPC (MD)
Central Florida EPC (FL)
Chester County EPC (PA)
Delaware EPC (DE)
EPC of Greater Miami (FL)
EPC of Marion County (FL)
EPC of Polk County (FL)
EPC of the Fun Coast (FL)
Martin County EPC (FL)

Mid-Florida EPC (FL)
Montgomery County EPC (PA)
New Orleans EPC (LA)
Philadelphia EPC (PA)
Pinellas County EPC (FL)
Spokane EPC (WA)
Suncoast EPC (FL)
Tampa Bay EPC (FL)

Hot Topic #1 · Membership Criteria Review & Increasing Membership

Does your council have a Membership Committee?

- It was noted that membership is often grown by the members themselves.
- Yes – the committee brainstorms event ideas, creates a non-renewal list for board follow up, discipline recruitment, and firm representation.

Which disciplines does your council admit for membership?

- Corporate memberships were addressed. One council reported that a law firm in their area is requesting that anyone from their firm be allowed to attend the events. Based on another council's corporate membership structure, a flat fee is charged for the firm and then each person is assessed an individual fee and accepted individually.
- Concern with regard to diminishing the value of membership was heard. One attendee suggested that being a member of a council should appeal because they are joining an elite group of professionals in their region.
- Some councils limit specific disciplines or categories (example: associate members).
- One council allows associate members, but requires a new application each year to ensure that they are still engaged in estate planning.
- Insurance and financial planning were combined into one discipline for one EPC in attendance.

Does your council have junior and/or student memberships? If so, what are the parameters of this program?

- One council in attendance offers a scholarship to a junior college student.

Has your council conducted any interesting or unique membership recruitment campaigns?

- One council in attendance allows a member to bring a guest at no charge to every meeting.
- Using a member brochure / visitor brochure was suggested [reference: sample]
- New members receive special recognition through their first year of membership.
- Allowing guests to briefly introduce themselves was noted as a best practice.
- A need to allow members to customize their membership experience was heard.

Has your council made any changes to the membership structure, programming, or events to attract younger members?

- Those in attendance discussed using social media and the merits of LinkedIn vs. Facebook vs. other alternatives.

Hot Topic #2 · Exciting Programming, Speakers and Topics

Does your council have a Programming Committee?

- Yes, and the need to begin planning early was voiced.

How does your council currently source speakers?

- Topics first, then speakers based on content.
- One council prohibits members from speaking, others do not.
- Most councils do not allow sponsors to speak.
- Council members want to hear topics appropriate to “regular” clients.

Does your council reference other go-to sources for programming ideas? Examples: conferences, NAEPCs no-charge or online speaker library, word-of-mouth, etc.

- Other conferences and events are used to gauge speaker likability.
- Other councils [reference: list found at <http://www.naepc.org/events/events-calendar> for those councils with a website hosted through NAEPC]
- YouTube

What types of events does your EPC host? Examples: educational, social, volunteer, etc. Has the average attendee changed, depending on the type of event?

- Social / cocktail events were commonly noted as being popular when hosted in a way that is not intimidating and comfortable for both members and guests.
- A need to ensure that all members and guests feel welcome was heard and reiterated. It was suggested that the board be used as greeters for each event and that all are aware of who the new members are.
- Of those in attendance, a few hosted breakfast meetings, most hold lunch meetings, one holds a volunteer or community event and many hold social/networking events.
- In addition to regular programming, one council holds a full day symposium that draws approximately 125 attendees, costs \$200 to attend, and has approximately 6 speakers.
- The group debated the need for, and value of, continuing education credit. While proof of whether offering credit has grown membership was unavailable, it was noted to be of benefit when easily obtained.

Hot Topic #3 · Engaging the Board & General Membership

How is your board of directors chosen? How often does the board meet? Are these meetings efficient and structured to make the best use of the volunteer's time?

- Those in attendance had boards that range from 6 – 18 members.

Are board and general members encouraged to serve on committees? Do you feel as if this has had a positive impact on your council?

- Personal invitation is best when soliciting committee participation.

Is your council surveying its membership? If yes, how are you doing so? If yes, how does your board determine action to take based on survey results?

- Yes, although responses have been minimal. SurveyMonkey was suggested as a good alternative.
- Real time polling during meetings and surveys were noted as a best practice and a way to keep meetings and events interesting [reference: <https://kahoot.it>]
- Short post-meeting surveys were also noted as a best practice. [reference: post-meeting survey]

Hot Topic #4 · Non-Dues Revenue

Does your council have a sponsorship program? If yes, please describe it.

- Yes, with a requirement that all board members participate. (\$500 per sponsorship)
- Yes, \$1,500 for each event.
- Yes, sponsors get complimentary attendees to each event.

Other Discussion Points

- As a best practice, member and guest fees should be significantly different to encourage membership growth. One council allows a guest to credit their guest fee toward a membership if they choose to join soon after attending.
- Incorporating Ice Breakers into each event was noted as a well-received best practice. Examples could be “show me your telephone wallpaper”, a question about a topic related to the presentation, etc. The council that employs this activity noted a very positive member experience and that members now know one another differently.

Closing Question ·

If you could only take one item from today’s meeting back to your board of directors, what would that item be?

- Remember to share NAEPC resources with council members.