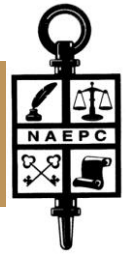


# Session Notes



## Regional Leadership Day 2017 Council Sharing Session Wilmington, Delaware – Sharing Groups #1 and #2

### ***Councils Represented***

Anne Arundel County EPC (MD)  
Baltimore EPC (MD)  
Bucks County EPC (PA)  
Chester County EPC (PA)  
Chester County EPC (PA)  
Delaware County EPC (PA)  
Delaware EPC (DE)  
EPC of Berks County (PA)

EPC of Central New Jersey (NJ)  
EPC of Montgomery County (MD)  
F & EPC of Southern New Jersey (NJ)  
Howard County EPC (MD)  
Montgomery County EPC (PA)  
Philadelphia EPC (PA)  
Southern Delaware EPC (DE)  
Spokane EPC (WA)

### ***Hot Topic #1 · Membership Criteria Review & Increasing Membership***

#### **Does your council have a Membership Committee?**

- The Membership Committee reviews applications in the “other” category.
- Board functions as the Membership Committee. While the council doesn’t have specific disciplines, it does have an associate membership designed for supporting positions. These individuals do not have voting rights.
- It was noted the an existing membership committee should be tasked with specific duties and functional to be successful.

#### **Do you struggle with an increasing or decreasing number or percentage of any particular discipline?**

- One council present had very few CPAs and will be hosting a “Bring Your CPA to Breakfast” event. A suggestion to work through the state CPA society was heard, as was the idea to share the council’s events on a listserve that supports under-represented disciplines.

#### **Has your council considered new qualifications for membership or recently conducted a bylaw review focusing on the membership structure?**

- Corporate memberships were noted as a possible offering. While one council recently eliminated this option, a second does have one where a flat fee plus a per member fee is paid.

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

- One EPC in attendance has a scholarship program.
- Visiting local law schools or similar educational institutions was noted as a best practice.
- One council is creating a Junior / Student committee.
- Reach out to local universities, other associations or new associate coordinators

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

- One council in attendance noted that the majority of their members are recruited through existing members and encouraged the use of member-based recruitment efforts.
- Bring a guest to an event free was heard as one option, during which non-members are encouraged to join.
- Happy hour recruitment event, including a discount for those who sign up while at the event
- Asking the board to reach out to major firms to recruit members and to leverage current members from within those firms, along with a focus on bringing in younger professionals
- A new member retention program was noted as a best practice, including personal phone calls to new members to encourage their active participation in council activities

## ***Hot Topic #2 · Exciting Programming, Speakers and Topics***

**Does your council have a Programming Committee?**

- Council handles programming during its summer board meeting.
- Planning two years out was noted as a best practice.
- Programming Committee chaired by VP
- A need to keep presentations at a high level, while weaving in less- or non-technical sessions was heard
- Hot topics: elder care, tax law changes, women's topics, time management

**How does your council currently source speakers?**

- Some councils start with the topic, others with the speaker.
- Paying vs. not paying speakers varied greatly among those in attendance.
- Sending the speaker schedule with the dues billing was noted as a best practice.
- Look at other councils to see who they are having [reference: list available at <http://www.naepc.org/events/events-calendar> for those councils with a website hosted through NAEPIC]
- Source speakers through a call to the membership
- Consider unusual or unique topics

**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 or networking events were quite popular among the councils in attendance, especially because they appeal to a younger and sometimes less-engaged subset of the membership. At these events the EPC leadership is encouraged to be present, function as a greeter, and make sure that everyone feels welcome and gets introduced around.
- Casual monthly “meet up” events
- A need to ask the membership, especially those who are younger, the best time of day to accommodate their schedule and work – life balance was heard.
- Use of a live feed or YouTube for those members who may not want to attend meetings in person
- The need to keep the host venue interesting was stated

**Hot Topic #3 · Engaging the Board & General Membership**

- One council has a meeting attendance requirement. Should the member not meet this minimum standard, they pay a penalty.
- The need for quality programming was noted as a priority. In addition, having variety within the programming schedule was noted as key to making members happy.
- Councils choose to emphasize sharing information and networking as a legitimate reason for joining.
- The use of surveys to understand what members are looking for in programming was noted as a best practice

**Hot Topic #4 · Non-Dues Revenue**

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

- A need to outline expectations with sponsors was heard.
- Almost all councils in attendance have a sponsorship program with incredibly varied levels of support
  - Multi-year commitments at \$3,000
  - Two per meeting at \$500 each
  - One council includes membership in their sponsorship benefits
  - Most councils allow their sponsors time at the microphone

## Other Discussion Points

- One council noted having a “clicky” reputation so they made sure to split the board up at events, make sure the board was active greeting guests and facilitating introductions, and visible and available to the general membership. This board also focuses on positive non-verbal communication skills. The council executive is also asked to assist in this manner.
- Councils varied greatly on their approach to continuing education credit.
- Acknowledging that members are looking for different things is important – what is valuable to one member may not be to another, and that’s OK!
- Those in attendance discussed their varying levels of community involvement, from none to volunteer opportunities to community education events.

## Closing Question ·

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

- Use NAEPCs programs to deliver value to the membership.