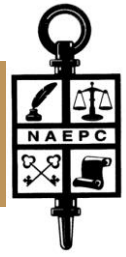


# Session Notes



Regional Leadership Day 2018 Council Sharing Sessions 1 & 2  
Anaheim, CA · Tuesday, June 19, 2018

## ***Councils Represented***

Atlanta EPC (GA)

Baltimore EPC (MD)

Citrus EPC (CA)

Conejo Valley EPC (CA)

Desert EPC (CA)

EP & Trust Council of Long Beach (CA)

EPC of Riverside County (CA)

EPC of San Bernardino (CA)

EPC of San Diego (CA)

EPC of San Gabriel Valley (CA)

Montgomery County EPC (PA)

North County EPC - San Diego (CA)

Orange County EPC (CA)

Philadelphia EPC (PA)

Pomona Valley EPC (CA)

San Fernando Valley EPC (CA)

## **Leadership that Cares**

How does your council choose its directors?

- Personal invitation
- Regular invitations for the entire membership, followed by personal request
- Current board members identify potential successors
- Need for term limits identified
- Pull from committee members

How are your officers chosen? Do they move up through the chairs to president?

- Once joining the board it's a 9 year commitment of three years as an at-large member and then rotating through the chairs

How often does your board meet? Via teleconference? In-person?

- Infrequently in person and only to focus on speakers, topics, and recruitment
- Before each meeting in person
- All months except July in person
- Every other month in person
- After monthly meetings in person

## **Membership: Changes, Growth & Retention**

Does your council have a Membership Committee? If yes, please describe their duties and yearly timeline.

- Almost all councils in attendance had one

Have the disciplines your council admits to membership changed in recent years in response to the changing landscape of estate planning?

- It was noted that often when one doesn't technically fit the disciplines and has been allowed to join (or perhaps joined for sales opportunities), this person will select out of membership because they are not getting what they expected from their membership

Share information about a successful membership recruitment campaign

- One council in attendance does not consider themselves to be a "networking" group
- Charge one discipline with recruiting new members from another discipline
- Adding a corporate membership may allow for exposure to individuals who may otherwise not meet the council. Concerns with unqualified people attending have not been realized.

How has your council successfully reached younger professionals who have become members?

- 
- Host events at a time that is convenient with topics of broad appeal.
- Create a "young professionals" group, social events often appeal for this purpose

How has your council successfully kept older members engaged?

- Make materials available for those who cannot attend events

## **Sponsorship**

- Per-meeting
- Ads in directories
- Corporate sponsorship (one per year)
- Expectation of board member contribution

## **Nurturing Engaged Members**

Is your council surveying its membership? What does the board do with the survey results?

- Monthly speaker survey (written) with an option to provide general feedback
- General survey by discipline conducted via phone call was "eye-opening"

Discuss ways to grow meeting/event attendance

- Offer continuing education credit, sometimes considered to be a member benefit

Does your council have a standard by which new members are welcomed?

- Acceptance email to signify membership has been accepted and begin the conversation
- Council must feel warm and welcoming at beginning of engagement with a new member

How are member milestones recognized? Does your council have member awards?

- "Evergreen Club" for members who have more than 25 years of membership
- Recognition of past presidents

## Operations Struggles

How are you successfully negotiating with vendors in light of overall pricing increases, the addition of company “policies” that are not in favor of the client, and an overall change in the meetings industry?

- Guest fees should be significantly greater, thus making it financially beneficial to become a full member.
- Negotiate with key vendors and hosting facilities
- Be creative with menu planning – ask for something “off menu” that is more suited to council’s budget
- Don’t be afraid to make changes or shop around – hotels, hosting locations, AV vendors

## Programming that Knocks their Socks Off!

Does your council have a Programming Committee? If yes, please describe their duties and yearly timeline.

- Yes, planning a year out.
- Board recommends speakers and must have heard that person present previously
- Ask for member feedback on surveys

How does your council source speakers? Does your council have go-to sources for programming ideas? Examples: conferences, NAEPCs no-charge or online speaker library, word-of-mouth, etc.

- NAEPC online library and “no charge” speaker program

Pros and cons of paying speakers / finding speakers on a limited budget

- Councils in attendance were split approximately 50/50 on whether they paid speakers
- Invest in a good speaker, making sure to have a good follow up plan in place for non-members who are qualified to join
- Team up with other councils to control expense of costly speakers
- Some councils subsidize expenses of speaker, but do not pay an honorarium
- Employ sponsors to allow for flexibility with speakers
- Some councils only allow locals to speak at certain events or on panels

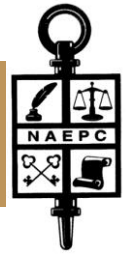
How often does your council meet? What types of events does your EPC host? (Examples: educational, social, volunteer, etc.) Do different events appeal to different types of members?

- Meeting times of those in attendance varied with 4 morning, 2 mid-day, and 4 evening
- Live stream on Facebook
- Speed networking
- Focus Group sessions (overseen by other than programming committee), defined as non-regular meetings that sometimes have members speaking who would otherwise be ineligible to do so – smaller events with capped participation
- Speaker cancellation turned into a “roundtable on the spot” session
- Focus on strong speakers and subsidize expense with sponsorship
- Short networking time followed by a strong speaker
- Yearly “state of not-for-profits” event
- Number of meetings of those in attendance varied from 4 to 10 per year plus socials

## Hot Speakers or Types of Speakers

- DEA Agent
- FBI Agent
- IRS professionals
- Judges
- Economist

# Session Notes



Regional Leadership Day 2018 Council Sharing Session  
Oakland, California · Thursday, June 21, 2018

## ***Councils Represented***

Atlanta EPC (GA)

Baltimore EPC (MD)

EPC of Diablo Valley (CA)

EPC of East Bay (CA)

EPC of Northern Nevada (NV)

EPC of Riverside County (CA)

EPC of San Gabriel Valley (CA)

Marin County EPC (CA)

Montgomery County EPC (PA)

Peninsula EPC (CA)

Philadelphia EPC (PA)

Pomona Valley EPC (CA)

San Francisco EPC (CA)

Santa Clara County EPC (CA)

Tri-Valley EPC (CA)

## **Membership: Changes, Growth & Retention**

Have the disciplines your council admits to membership changed in recent years in response to the changing landscape of estate planning?

- Some councils have caps on the number of people who can be members in any one discipline – others have added flexibility to this requirement so quality potential members are not turned away
- Realtors (with a special supplemental form required at the time of application), auction professionals not admitted
- One council changed their bylaws to admit members in accordance with NAEPCs requirements required to obtain the AEP® designation
- Differences in council philosophy were addressed, some see a need for inclusivity while others are comfortable with exclusivity
- Associate category added
- No more than a pre-determined percentage in any one category overall, rather than in a specific cap on member total

Share information about a successful membership recruitment campaign

- Bring a [choose discipline] free events to increase in any one discipline
- Enter all referring members into a drawing [Note: Council may wish to check with state and local authorities with regard to laws related to gambling.]
- All new members to bring a complimentary guest once per year or consider a special member recruitment event where all members are encouraged to bring a qualified guests
- Personally phone lapsed members

How has your council successfully reached younger professionals who have become members?

- Creating a video “mockumentary” to show the council in a new light
- It is necessary to create a pathway to membership for people who do not have the experience required to join – otherwise those individual may not return when eligible

Describe successful Junior/Student membership programs as well as successful mentorship initiatives

- Create a strong relationship with local professionals, consider offering them membership, in an effort to reach their students regularly and warmly
- Sacramento EPC has a scholarship program

How has your council successfully kept older members engaged?

- Yearly panel of seasoned members
- “Evergreen Club” of members with 25+ years of membership
- Newsletter recognition
- Different badge colors to signify longevity of membership
- Regular acknowledgment at meetings
- Highlight a past president in newsletters / at meetings
- Consider retired member status with different benefits

### **Nurturing Engaged Members**

Is your council surveying its membership? What does the board do with the survey results?

- At meetings
- Using a service available through their database called 1-2-3 Signup
- General member survey
- Open discussion at end of every meeting for both overall input and speaker suggestions

Discuss ways to grow meeting/event attendance

- Recognize the needs and wants of members and make those opportunities available to them

Does your council have a standard by which new members are welcomed?

- Sign at meetings showing all new members
- Note on name badge
- Give a new member a complimentary drink / drink ticket
- Recognize the member who referred the new member
- Stand for recognition and allow new member to introduce themselves
- Publication in newsletter
- 6-9 month check in with mini-survey, phone call, letter
- Instruct board to be present, warm and welcoming to new members

## Operations Struggles

How are you successfully negotiating with vendors in light of overall pricing increases, the addition of company “policies” that are not in favor of the client, and an overall change in the meetings industry?

- Investigate local colleges and universities that may be interested in having members onsite in exchange for reduced meeting fees and free student admission to events

## Programming that Knocks their Socks Off!

Examples: conferences, NAEPCs no-charge or online speaker library, word-of-mouth, etc.

- NAEPC annual conference and speaker resources

Pros and cons of paying speakers / finding speakers on a limited budget

- Don't be afraid to negotiate
- Piggyback with other councils or associations nearby who are having the speaker
- Joint meetings with other associations can allow for expense-sharing

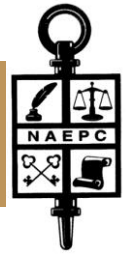
How often does your council meet? What types of events does your EPC host? (Examples: educational, social, volunteer, etc.) Do different events appeal to different types of members?

- Emerging professionals ; young professionals events
- Hearing a strong call for more social and networking events
- Holiday event with a charitable component

## Speaker Ideas

- Speaker from treasury
- Art panel
- CA assisted suicide law
- Cyber-security
- Crypto currency
- Guns / gun trusts / challenging assets
- Probate judge
- John Martin
- Dealing with banks
- Vicki King (bio ethicist)
- Social media practices
- “The Will of John Sutton”
- FBI / DEA Agent
- Public affairs officer from Social Security
- Bob Hartnett
- Kyle Martin
- Nancy Rapoport (ethics)
- Marianne Jennings (ethics)
- Succession planning for members and their practices
- Wendy Goff (rights of reproductive matter)
- Eden Rose Brown (values based planning)

# Session Notes



Regional Leadership Day 2018 Council Sharing Session  
Seattle/Tacoma, Washington · Monday, June 25, 2018

## ***Councils Represented***

Atlanta EPC (GA)  
Baltimore EPC (MD)  
EPC of Portland (OR)  
EPC of Riverside County (CA)  
EPC of San Gabriel Valley (CA)  
EPC of Seattle (WA)  
EPC of South King County (WA)

Montgomery County EPC (PA)  
Northwest Washington EPC (WA)  
Philadelphia EPC (PA)  
Pomona Valley EPC (CA)  
South Puget Sound EPC (WA)  
Spokane EPC (WA)  
Tacoma EPC (WA)

## **Membership: Changes, Growth & Retention**

Share information about a successful membership recruitment campaign

- Corporate membership has been added for one council, which gives a firm an opportunity to have two traditional members, but also allows others to attend and experience the council in their place.
- All members who refer a new member are entered into a raffle, drawn twice per year. (Note: you may wish to consult your state for laws with regard to gambling before offering a raffle.)

How has your council successfully reached younger professionals who have become members?

- The Portland council has a “pathways” member, which is a cross between students and those who are new to the area. This allows these individuals to begin meeting people and start the track to membership.
- Socials appear to attract younger members – events where they are not being spoken at, but rather involved in dialogue

Describe successful Junior/Student membership programs as well as successful mentorship initiatives

- Seattle council has recently begun a scholarship program

How has your council successfully kept older members engaged?

- The Tacoma council boasts a 50% member participation rate and has many seasoned members. The council honors tradition, while maintaining a focus on the future.
- Northwest Washington EPC places significant focus on collaboration in their activities
- Networking time is highly valued in Seattle



Does your council have a focus on diversity?

- One council in attendance has reached out to their local minority bar associations
- NAEPC is currently drafting a statement on diversity
- Mentorship programs

### **Nurturing Engaged Members**

Is your council surveying its membership? What does the board do with the survey results?

- Yes, for events (paper)
- Yes, for events (electronically to arrive at conclusion of the meeting)

Discuss ways to grow meeting/event attendance

- Partner with other councils

Does your council have a standard by which new members are welcomed?

- New member reception, designed to strengthen the bond between the council and members early in their involvement
- Purposeful introductions of new members to board members
- Instruct the board to seek out identified new members at each event
- Spokane has a detailed system by which guests who are eligible to become members receive follow up communication directly from the council's executive

### **Operations Struggles**

How is your council handling its most important logistics like payments, RSVPs, database management, historical documents, record retention, etc?

- A need for a clear and enforced late registration, no show, and walk-in policy is paramount

### **Programming that Knocks their Socks Off!**

How does your council source speakers? Does your council have go-to sources for programming ideas?

- Attendance at the NAEPC annual conference
- Other national networks
- NAEPC "no charge" speaker program
- Member input

How often does your council meet? What types of events does your EPC host? (Examples: educational, social, volunteer, etc.) Do different events appeal to different types of members?

- The Seattle council hosts a 2-day seminar in conjunction with the University of Washington School of Law, now in its 63<sup>rd</sup> year
- The Portland council hosts evening events with cocktails and appetizers, no dinner, and each year hosts a "young professional outreach panel" that includes students. (Note: eliminating dinner is a cost-effective way to host an event)
- Spokane EPC is adding breakfasts
- For East King County EPC, breakfasts draw attendees
- Seattle is hosting "brown bag" events using the NAEPC webinar series
- Speed networking events are very popular for one council
- Networking-only events are returning to popularity and being employed by more than one council in attendance
- Many councils host solely dinner meetings

- Tennis event
- “Drop in” events offer appeal for younger members

#### Speaker Ideas

- Speaker on crypto-currency / Bitcoin
- Someone from DEA on disposal of and issues related to legal/illegal drugs
- Elder abuse and financial fraud