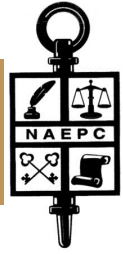


# Talking Points



Council Leadership Day, Council by Size Breakout Session  
Wednesday, November 16, 2016 · 1:00 - 5:00 pm

## Getting to Know One Another ·

Introductions

Board position held

Council represented, # of members

NAEPC services currently using (website, Leimberg LISI service)

*\*reference Council Services Packet if unsure*

## Opening Questions ·

What do you hope to take away from today's session?

Is there any single issue that is most important to you and your council for discussion today?

What is currently the biggest struggle for your council?

What is the single most important factor in the success of your council?

## Leadership & Council Management ·

Describe your council's board structure, path to officer positions, discipline representation, etc.

Does your council employ a compensated professional administrator/executive? What are the duties associated with this position?

Does your council board currently have someone serving as a liaison to NAEPC, making regular reports about the relationship with NAEPC and its offerings, etc?

Have you struggled with diversity among board members?

## Communications ·

How are you communicating with your members and how often?

Which social media platforms has your council used? How are you using this platform to increase member engagement?

*Next page...*

*Membership, Growth & Retention  
Programming & Events*

*Financial Health  
Consumer Outreach*

## **Membership, Growth & Retention •**

Which disciplines does your council admit for membership? Which are not accepted and why?

Has your council considered new qualifications for membership recently? At any point, were these discussions a struggle? Why or why not?

Does your council have, or has it considered, junior and/or student memberships? If so, what are the parameters and how has this offering benefitted the council or the members?

What is your current pattern with regard to membership totals (increasing, decreasing, staying steady)?

Do you struggle with the increasing number or percentage of any particular discipline?

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

Have you struggled with diversity among members?

How is your council recognizing new members or member milestones?

## **Programming & Events •**

Do you place limitations on who can speak (members, non-members, national-only)?

Have you used the NAEPC “no charge” speaker program, online library, or a webinar?

Has your council hosted events at unique venues recently?

Does your council hold purely social events, volunteer opportunities, and/or activities without technical education?

How do you ensure that the yearly program is diverse and appeals to all member disciplines?

Are you offering continuing education credit? Why or why not?

## **Financial Health •**

What, if any, forms of non-dues revenue have you been able to successfully implement?

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

## **Consumer Outreach •**

Has your council had an event for public benefit? If yes, please describe this event in detail.

Is your estate planning council participating in National Estate Planning Awareness Week? Why (and how) or why not?

*Next page...*

*Involvement with NAEPC  
Other Questions of Interest*

*Closing Question*

## **Involvement with NAEPC ·**

Has your council utilized the Council Nominated AEP® designation program or the “Social in a Box”?

How does the council determine who is eligible?

How has using the program benefitted your council – have you seen membership retention?

How do you communicate to your members that your council is a member of NAEPC and has access to the programs & services offered by that membership?

Are there any programs or services that you wish NAEPC offered?

## **Other Questions of Interest ·**

What have you implemented in the past few years that is different or new to your council?

Has your council recently launched any technology-based initiatives?

How will you share information learned during this session with your board of directors upon returning home?

## **Closing Question ·**

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

## **FOLLOWING UP....**

Thank you for participating in the Council by Size sessions today! Please take the information you have learned back to your board of directors by sharing a full report at its next meeting.

Notes from this session will be posted online at <http://www.naepc.org/conference/leadership-day> approximately 30 days following the program. Those who have signed in using the sheet near the door will receive an email notification with the notes have been posted.

