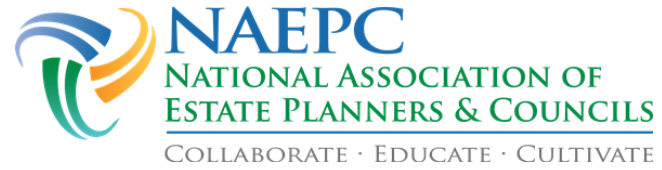


## COUNCIL LEADER EDUCATION SERIES

Program                      Imagining Your Council Post-COVID: Strategies for Sustaining Membership and Engaging Members in New & Different Ways  
 Facilitators                Laura B. Kiick, CRPC®, CFP® & Lauren V. Smigelski · Estate Planning Council of Cleveland  
 Live Date                    Friday, April 22, 2022

## PROGRAM WORKSHEET

	MEMBERSHIP RETENTION	MEMBERSHIP GROWTH	MEMBER ENGAGEMENT
	<i>measuring how many members keep their membership active and for how long</i>	<i>conventional growth opportunities (marketing and organic acquisition) and from members acting as ambassadors</i>	<i>the ongoing interaction between a member and organization in exchange for meaningful value</i>
Proven Strategies	<ul style="list-style-type: none"> <li>• Have &amp; utilize a membership committee</li> <li>• Personal calls to unpaid members before it's too late</li> <li>• Find a "hook"</li> </ul> <p>+</p> <p>Retention begins the moment a member joins. Make the first year or two of membership positive &amp; meaningful</p>	<ul style="list-style-type: none"> <li>• Plan engaging events to encourage new connections</li> <li>• Review bylaws, discuss new qualifying credentials</li> <li>• Charge the board</li> <li>• Empower existing members &amp; make it fun</li> <li>• Special recruitment events</li> <li>• Proactive outreach to prospects</li> </ul>	<ul style="list-style-type: none"> <li>• Define engagement: one size doesn't fit all</li> <li>• Measure progress based on council's standard</li> <li>• Survey regularly</li> <li>• Make meetings &amp; events <i>warm and welcoming</i> (location, format, etc)</li> </ul>
New Ideas			



**OTHER IDEAS & NOTES**

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**PEOPLE OR COUNCILS I'D LIKE TO FOLLOW UP WITH**

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**MY FAVORITE IDEA OF THE DAY**

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