A word about the session notes:
The information shared below is a synopsis of the discussion during five Zoom-based Town Hall Roundtable sessions held during May, June and July 2020 in response to COVID-19.

Membership

Sub-Topic · Engagement
Your members want to stay involved... and may have a bit more time to do so

- Don’t abandon programming, whether educational, social or networking!
- Plan small focus group sessions related to planning for next season
- Plan an all-council “Town Hall” where members can receive updates, meet and/or hear from leaders, and share feedback
- If the council is not offering a compelling social media presence on LinkedIn or Facebook, create a task force to discuss starting them (NAEPC is available to assist with best practices)
- Encourage members to actively participate in existing social media groups
- Host creative and compelling virtual networking and fun events like:
  - “Brown bag” luncheons
  - Wine / beer tasting
  - Happy Hour
  - Stress-management events
  - Monthly “game night”
  - “Antique Roadshow”-like event
  - “Speed networking” using online breakout rooms with 4 – 6 people in each, provide feeder questions to get the conversation started
  - Museum tours

Sub-Topic · Retention
Things your council can do now to aid in retention through the next season -

- Stay in constant communication, including video messaging
- Focus on engagement now and through the typically dormant summer months by hosting educational, social, and networking events
- Set the council apart through service and community outreach events (example: foodbank)
- Recognize that members have different needs and be flexible when necessary
- Be gentle with dues collections; recognize that members may need more time due to cutbacks or simply not being in the office
- Allow for online renewals to avoid the need for a firm to cut a check and mail it
- Communicate via email and paper mail
- Reiterate benefits of membership regularly
- Survey members – what types of topics are you interested in seeing the council offer?
- Consider setting up virtual study groups
**Sub-Topic · Growth**

*Don’t pause your growth goals*

- Communicate with non-members, the council’s response to COVID-19, share your plans for next season along with today’s activities and community support
- Use webinars as a way to show value to non-members; allow these individuals to experience the council on a complimentary basis with these low-cost programs
- Personal outreach
- Develop relationships with allied professional organizations such as local community foundation and consider joint events, virtual or otherwise, with other councils in your area

**Meetings**

**Sub-Topic · Annual Meetings**

*Your council can still have its annual meeting*

- Review council’s bylaw sections related to annual meetings, voting rights, quorums, etc.
  - Interpret with flexibility
  - Look for words like “in person” and guidance with regard to dates
  - Scan for prohibitions against online meetings
  - Check with state to find out whether there are any legal requirements with regard to an annual meeting for a non-profit
  - Ask NAEPC for a brief, non-legal review
- Consider hosting the annual meeting in conjunction with an educational webinar to increase attendance
- Use the event as an opportunity to update your members
- Vote using a ballot or by having members vote via email (recommended as a last resort)
**Sub-Topic · Virtual Educational Meetings**  
*Like it or not, virtual meetings are here to stay*

- It’s easier than you think!
- Registration is often higher
- Day-of attendance is strong
- Members want to see one another and interact
- Don’t make assumptions about the membership’s level of tech-savviness; may want to offer a trial run or “how to do” a Zoom/virtual meeting
- Use a “chat” window to get attendees talking to one another
- Platforms available that range from self-service (example: Zoom/GoToMeeting/WebEx) to full-service (example: ConferTel) with levels in between, some which incorporate continuing education tracking (ConferenceAdit)
- Your chosen delivery platform will not accommodate all members or their needs – make sure to communicate alternative methods to join the event (example: telephone or using a personal computer instead of a firm-supplied computer)
- Rehearse with speakers, if necessary
- Consider the NAEPC “no charge” speaker program, but rather than have that person live, have them in a virtual call (benefit of cost-effectiveness)
- Consider webinars as an alternative to live speakers
  - NAEPC can offer every council one complimentary group showing each year to rebroadcast via Zoom or other platform
- Plan pre- and/or post-event networking
- Treat it like a regular meeting – welcome, opening remarks, sponsor recognition, presentation, Q&A, closing remarks, etc.
- Does the meeting time need to change to be more accommodating? Now is not the time to stand on history!
- Consider a special event as the virtual kick-off – scripted ethics panel (somewhat like a play, reference: Philadelphia EPC)

**Sub-Topic · Continuing Education**  
*Don’t assume things are “business as usual” with regard to continuing education credit*

- Check with your state and governing bodies now for rules related to live and on-demand distance learning programs (often treated differently than one another and from in-person events)
- Investigate rules with regard to tracking attendance
- Communicate availability clearly with members
- Make sure all members understand their responsibilities and how to get credit and start the process of informing them with the event listing and a special pre-event email
**Sub-Topic · Planning for Next Season**

*Start now and plan with flexibility*

- There is no “right” answer
- Survey members with regard to their comfort level on attending an in-person event
- Plan small focus group sessions related to planning for next season
- Start now by choosing speakers that have the flexibility and comfort level to present in person, virtually, or both
- Consider a venue that provides the ability to stream the program for those who may wish to stay at home or avoid large gatherings (City Clubs, colleges, etc)
- Contract with venues carefully and with flexibility
- Consider meal vouchers to provide the meal members would have otherwise received (ex: GrubHub)
- Consider an expanded schedule for the 2020/2021 year
- If the council is one that prefers a formal plan, choose to host all events virtually through a pre-determined date
- Partner with “sister” organizations
- Venue should be large enough to accommodate a reduced number of guests at each table
- Plated meals will be preferred, if not required by your state
- Avoid “self-service” items like water, coffee, bread and butter

**· Financial Considerations**

**Sub-Topic · Budgeting**

*Preparation is key*

- Prepare a multi-scenario budget
- Consider preparing a contingency budget taking into account a certain percentage drop in membership
- Don’t be afraid to make changes – just because something has been done one way for some time, doesn’t mean it can’t be changed
**Sub-Topic · Dues**

*Membership dues support the council’s activities*

- Review the council’s current cash position
- This is the perfect opportunity to review the council’s dues structure
- Communicate with membership openly
- Delay dues collection slightly if the plan for membership season / year is not in place
- Contemplate personal outreach
- Be flexible and gentle with dues collections; recognize that members may need more time due to cutbacks or simply not being in the office
- Accept credit cards as payment to make it easier on the member and council
- **Options with regard to dues:**
  - Consider financial reductions for members who didn’t receive all of the benefits of membership during the prior year (make sure this policy is clearly communicated)
  - Consider changing from an all-inclusive to pay-for-events-as-you-go system
  - Reduce dues*
  - Eliminate dues*
  - Reduce dues slightly and charge in a “pay-as-you-go” system when meetings begin again mid-season

*Recognize that in both of these circumstances, it may be hard to return to “normal” when it’s time to do so.*
Sub-Topic · Sponsorship

Creativity is a must

- Don’t assume all is lost - sponsors generally want to have an ongoing presence, even during difficult times
- Communicate with prior year supporters
- Transfer prior year support if necessary
- Reconsider your program as a whole and/or levels of support
- Make it easy for sponsors to participate
- Benefits are likely to be different for virtual vs in person events, plan for both and communicate options
- Host networking events where sponsors have breakout rooms and can talk directly with interested members; share an attendee list post-event
- Use logos and links rather than a firm name wherever possible
- Update the council’s website and add placements where desirable
- Watch the NAEPC website tutorial: “Leveraging your NAEPC-hosted Website to Maximize Your Council’s Sponsorship Income”
- Get creative with regard to benefits
  - Microphone time at online events
  - Video introductions for meetings and posting on website
  - Logo placements
  - Link to website in chat window with thank you message
  - PowerPoint template with sponsor logo
  - More online placement
  - Change the meeting host photo to the sponsor’s logo
• Resources

Technology Platforms

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<th>Platform</th>
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<tbody>
<tr>
<td>Zoom</td>
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<tr>
<td>GoToMeeting/Webinar</td>
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<td>ConferTel (NAEPCs webinar provider)</td>
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<tr>
<td>ConferenceAdit (incorporate of CE tracking)</td>
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Fun Games

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NAEPC Website Tutorial

“Leveraging your NAEPC-hosted Website to Maximize Your Council’s Sponsorship Income”
https://vimeo.com/424180727/028224cd01
*Contact NAEPC for other tutorials or find them in the administrative hub of a website hosted by NAEPC.

Sample Budget

http://www.naepc.org/assets/national/files/Sample%20EPC%20Budget.xlsx

NAEPCs Programming Resources

http://www.naepc.org/affiliated-councils/speakers-bureau

Council Section of NAEPC Website

http://www.naepc.org/affiliated-councils
*Use left panel navigation to read all pages related to councils.