

**2020 Program Development Division
October 28, 2019 Report
Juli McNeely, Global Council Member**

Early on in the process the decision was made to set a theme for the Program Development Division (PDD).....together we will be preparing and serving two exquisite “meals”....one in Anaheim and one in Dubai. The Program Development Committee (PDC) teams will be in the “back of the house” preparing and cooking the meal. The Program General Arrangements (PGA) teams will be in the “front of the house” and will serve the members in both locations to ensure that their experience is exceptional. If you envision any exceptional meal you have had in a restaurant, both the food and the service were amazing. If one or both areas fall short, your opinion isn’t good and it’s quite likely you won’t return. We believe we have the best possible team both in the “back of the house” and in the “front of the house.”

Back of the House – PDC Teams

I’m excited to report that the two PDC teams have been hard at work since July as they have begun to plan the menu for the two feasts (meetings) that will be prepared for members in 2020. Both the Annual Meeting and Global Conference teams have done a great job thus far.

The Annual Meeting Team, under the Leadership of DVP Craig Lilley, has gotten off to a great start and will arrive at their November meeting in Chicago with all of the ingredients to prepare an outstanding menu/meeting.

- The Chair of Main Platform/Special Sessions (MP/SS), Ana Sofia Rodriguez, runs a tight ship and has managed to get her team prepared with a few weeks to spare. The excitement is building as each team member plans their “dream show flow” in advance of coming together in Chicago in November. I’m confident that the collective result will be exceptional.
- The Chair of Focus Sessions, Rino Cipparrone, has a large team but he has gotten them all on task with the help of his three assistant chairs. They have managed to line up wonderful offerings and are in the final stages of getting final acceptances from the selected Focus Session speakers. Rino’s team also dealt with one of their team members jumping over to Global Conference to fill a hole left by a resignation there. I’m very impressed by how this team takes everything in stride. They will also be ready for the Chicago meeting in November.
- The Chair of ConneXion Zone (CZ), Miguel Mejia, has worked hard with his team to find and vet potential speakers for CZ. This team experienced a slight lull as their staff person was focused on Sydney but they seemed to make up ground quickly upon her return. They will have some work to do to fill in the gaps for a few language specific areas but I’m confident that they will be ready for the November meeting.

The Global Conference Team under the Leadership of DVP Rajesh Chheda has also gotten off to a great start and will arrive at their November meeting in Chicago with all of the ingredients to prepare an outstanding menu/meeting. This team experienced a lull also due to the Sydney meeting as several of the key players were involved in that meeting as well.

- The Chair of MP/SS, Tse Pui Chi Jacqueline has gotten her team caught up quickly and has focused them on the tasks that need their immediate attention. They have a ton of energy and seem thrilled to be experiencing this meeting from the “inside”. They will be prepared for Chicago.
- The Chair of Focus Sessions, Tse Lap Yee Stanley, has a large team but he has gotten them all on task with the help of his two assistant chairs. They have managed to line up wonderful offerings

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and are in the final stages of getting final acceptances from the selected Focus Session speakers. Stanley's team also dealt with the resignation of one of their team members and quickly accepted a new team member from the Annual Meeting team to fill the gap. I'm very impressed by how this team takes everything in stride. They will also be ready for the Chicago meeting in November.

- The Chair of CZ, Herold Chen, has worked hard with his team to find and vet potential speakers for CZ. This team has a TON of energy!! It is contagious and I'm confident that they will be ready for the November meeting.

Front of the House – PGA Teams

The two PGA teams are just ramping up with the AM team being slightly ahead of the GC team again due to the Sydney meeting and staff/volunteers being focused there.

The Annual Meeting Team, under the Leadership of DVP Yuka Nakahara-Goven, has gotten off to a great start selecting leadership and also just held the first chair call last week to prepare for the site visit mid-November in Anaheim. The chair, directors, staff and I will get a first-hand look at the Anaheim campus so that plans can be made.

- Member Logistics Committee Chair – Manuel Dy Chuaunsu Jr.
- Member Services Committee Chair – Lesley Weiner
- Member Enhancement Chair – Brad Myers

The leader of the Global Conference Team, DVP Pecky Wong So Ping, has just arrived in Chicago so that she can complete her orientation on October 28 and 29. Selecting her leadership will be her priority during the visit. Pecky, her chairs and directors, staff and I will travel to Dubai mid-January for the site visit.

- Member Logistics Committee Chair – Glen Alexander Winata
- Member Services Committee Chair – Hidenori Miki

It has been a busy four months since this process started and I will say we have an exceptional group of volunteers working together. I would be remiss if I didn't take a minute to acknowledge our great staff team working alongside of us. I have noticed ongoing improvements as we continue to evolve the way we put this meeting together year after year. They are exceptional and without their organization the volunteers would be lost!! Thankful they keep us on task and on time.

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
MAIN PLATFORM/SPECIAL SESSIONS COMMITTEE**

OBJECTIVE:

Plan and develop content for the Annual Meeting program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

The committee has made great progress and it is right on schedule according to the established objectives and timeline. Up to this point the following tasks have been accomplished:

1. Speaker Review Lists: The committee has finished reviewing speakers for Main Platform and Special Sessions at this point. More than 250 speakers were reviewed and scored dividing the results into two final lists (A/B).
2. MDRT Speaks: Invites to submit proposals will go out to the list of applicants to MDRT Speaks. The deadline for submissions will be mid-November. Once we receive all submissions committee members will proceed to review them using a similar method as the one used to rate speakers for MP. We can expect to have selected MDRT Speaks member speakers by the end of the year.
3. November Meeting/Show Flow: the main objective for the November meeting is finalizing the speaker selection process and putting together our first show flow. This would allow Sheila to start contacting selected speakers and confirming their availability.

In order to better prepare for the November meeting, committee members will create their "ideal show flow." They will prepare by themselves the show flow of their dreams selecting and slotting speakers on their own. I have great confidence in this exercise. Committee members have been motivated to use their creativity and think outside the box.

Upcoming calls will be used to resolve any doubts that might arise among committee members while executing this exercise.

DIVISIONAL VICE PRESIDENT COMMENTS:

What more can I add, Ana Sofia has her fold striding full out, and once she cracked the whip the lone straggler quickly caught the pack." Ana Sofia has been unbelievably "task oriented" {her own words} from the July meetings in Chicago through today and likely moving forward. Despite being a task master, she has a very enthusiastic team and they all jump when she demands it. They are on schedule in every aspect of their task and MP/SS is shaping up to be a very solid program.

CHALLENGES TO CONSIDER:

We have a great and very committed team. Their diligence to complete tasks demonstrates this. At this point, only some issues of tardiness in submissions have arisen with one particular committee member. I already spoke to him about it.

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
MAIN PLATFORM/SPECIAL SESSIONS COMMITTEE**

OPPORTUNITIES TO CONSIDER:

At this point, my recommendations for 2021 team have to do mainly with how to make the speaker selection process more efficient.

Lists of speakers/incomplete submissions: currently members can submit speakers for consideration for Main Platform/Special Sessions (MP/SS). This list of recommendations is added to the recommendations made by committee members which will later be reviewed by MP/SS Committee. Upon review, we ran into speaker recommendations that we thought were incomplete. For example, some lacked a link to a video to rate or the video submitted was a promo reel rather than a keynote.

I recommend that all incomplete submissions should either try to find the information missing and if it isn't found then be eliminated from consideration. This all should happen prior to the meeting and can be done by staff.

Review lists: before sending review lists to committee members, staff should test all video links and make sure they work, are current (less than three years) and are applicable (keynote or short speech).

Speaker recommendations: when asking for speaker recommendations from committee members ask for 10 but from different categories. This would help with the fact that most of the recommendations are for motivation and coaching.

MEMBER RECOGNITION:

I want to make note of how thankful I am to Craig and Juli for their support throughout these months. I know I can be very task-oriented and you have proven to be a perfect balance and teachers, providing encouragement and motivation for committee members at each task.

PARTICIPANTS

ExCom Liaison(s):	Ian Green, DipPFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Craig Alan Lilley, CFP, CLU, Hillsdale, Ontario, Canada
Chair:	Ana Sofia Rodriguez, MBA, Panama City, Panama
Members:	Saad Anthony Baksh, BSc, Marabella, Trinidad and Tobago Chan Mou Hon Terrence, Hong Kong, Hong Kong H. Richard Dobson, Jr., CFP, Cedar Falls, Iowa, USA Kimberly A. Harding, CLU, Woburn, Massachusetts, USA
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Sheila Darcy

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
FOCUS SESSION COMMITTEE**

OBJECTIVE:

Plan and develop content for the Annual Meeting program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

1. PROGRESS - July planning meeting offered beneficial time to liaise with the other meeting “twin”.

We have 15 captains once again in 2020, eight of which are planning a program for their specific non-English language group.

New time slots for Focus Sessions were introduced as a result of the discussions at the July planning meeting:

Focus Session	Monday	Tuesday	Wednesday
FS Session 1	3:00 - 4:00 PM	1:30 - 2:30 PM	9:00 - 10:00 AM
FS Session 2	4:30 - 5:30 PM	3:00 - 4:00 PM	10:30 - 11:30 AM

All Focus Session team members are using Dropbox and WeChat to help with streamlining resources and aid in informal communication. To note there are two members from China who cannot access Dropbox, so direct email attachments have been the alternative method to accommodate them.

MDRT’s switch over to using “Zoom” for conference calls has seemed to lessen connection issues for non-North American members. Assistant chairs led their first calls in September and will continue to lead their group in the monthly conference calls planned until May 2020.

For 2020, there are 13 Focus Session rooms of programming planned for a total of 78 Focus Session offerings.

Proposal invitations were sent. Submissions were due September 20. Captains reviewed and evaluated close to 200 submissions.

The captains have been thoughtful in the session selection process. Currently the Korean and Japanese captains have come together to put together a joint panel of both Korean and Japanese speakers. The Thai captain sought out a Japanese speaker, and there are some intriguing panels and co-presentations which have been put together to get varying insights on subject matter.

Assistant chairs have been responsive to their respective teams and thorough in their follow up to keep everyone to the timeline.

Focus Session “selected speaker” invitations are being prepared to be sent October 10 and 11. Acceptances to invitations due October 18.

I am very happy with the leadership quality of all the assistant chairs have shown so far. Everyone seems to be on the same page and striving to achieve the same objective of bringing the “best” Focus Session program to the 2020 meeting.

The captains have been very cooperative and reliable in following up on their duties and responsibilities. Captains have been very positive and energetic to the process to date.

A terrific “Team Work” approach has been shown and given by the complete team.

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
FOCUS SESSION COMMITTEE**

Colleen Schneider, our staff liaison is the key to providing our team with a tremendous amount of support.

I feel fortunate to have such a great group of people to work with this year.

2. CONCERNS - At this point there are not any major concerns that have not been addressed and receiving support.

We are currently working on a joint Korean and Japanese session and I know that this is being looked at by the logistics team at MDRT home office. I would like to see this happen as this is a high demand session by the members of those two countries.

I will continue to work on mentoring and working with Joe Thomas and Subrata Saha as they take on their first time assistant chair roles. Both Joe and Subrata have been very cooperative to work with.

We will be focusing over the next few months to work on building a strong working bond and relationship between the captains and speakers as this will go a long way to enhancing the quality of the Focus Session program we will deliver.

Continuing to work with the language specific captains and interacting in a positive way, remembering and respecting the culture differences between North America and other countries.

3. NOTES FOR 2021 TEAMS - Invitations for the captain deadline dates for their responsibilities should not overlap with Global Conference meeting dates. This year we had several people decline the invite because they were planning on attending the Global Conference which interfered with the follow up dates of their captain responsibilities.

I would suggest a meeting between the chairs of both the Annual Meeting and Global Conference with their staff liaisons prior to the general meeting. This will allow them to fully review and map out the agenda of the focus team break out session of the meeting.

One thing I think we made improvement on was our discussion regarding different session formats, i.e. developing panels, using technology, role play, etc. I'd want to build on that and increase the amount of time in that discussion, make it more of a group-sharing activity. Solicit feedback as far as personal experiences in participating or hearing these types of session formats. I think more time on this prior to the discussion/divvying up of names is beneficial.

Other than that – I thought joining forces with both Global Conference and Annual Meeting provided more perspectives and I found that to be a positive. If we continue that next year, I believe it will be even more valuable as the Global Conference team will have had an actual meeting to pull from their experiences.

DIVISIONAL VICE PRESIDENT COMMENTS:

Rino has done a terrific job with Focus Sessions. The rest of his team have also been exceptional to a tee. Having spent the past three years on PDC working with Focus Sessions and much of the four years prior with PGA, also aligned to this group, I am keenly aware of how this group operates and where they should be by mid-October. They are on schedule and operating with night vision. The telephone calls

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
FOCUS SESSION COMMITTEE**

chaired by the three assistant chairs this week were all outstanding. I am 100% confident that the Focus Sessions our team are creating will excite attendees and leave them pumped to return to their respective practices and perform at a new level of production.

Rino Cipparone began with a fabulously collaborative week, working alongside Stanley and the Global Conference team in Chicago. Rino's extensive MDRT experience has prepared him very well for his role directing the three assistant chairs and 15 captains. Listening to Ian's request to "Think outside of the box" they have shaken up the FS format a little, beginning the Monday FS's later than in the past and having some collaborative sessions with co-presenters of different languages are examples of these added wrinkles. I'm hopeful they don't cause Colleen to also have added wrinkles. This group is solidly on track and will have accomplished a great deal by the time we exit "Mecca" in mid-November.

CHALLENGES TO CONSIDER:

None at this time

OPPORTUNITIES TO CONSIDER

None at this time

MEMBER RECOGNITION

None at this time

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Craig Alan Lilley, CFP, CLU, Hillsdale, Ontario, Canada
Chair:	Rino V. Cipparone, CFP, CLU, Pickering, Ontario, Canada
Assistant Chairs:	Todd D. Hruby, LUTCF, Lincoln, Nebraska, USA Subrata Saha, MBA, Kolkata, India Joe Thomas, AIF, Birmingham, Alabama, USA
Captains:	Pu Chen, Shanghai, China Hiromichi Chiba, Tokyo, Japan Jay M. De Finis, CLTC, Cleveland, Ohio, USA Rahul Rohit Dhanani, Mumbai, India Joseph Fang, Taipei, Taiwan Tristan Karl Robert Hartey, Oswestry, United Kingdom Peter J. Leonard, Brockville, Ontario, Canada Dana Mitchell, CFP, CLU, Toronto, Ontario, Canada Gran Ongsuwan, Bangkok, Thailand Elli Schochet, CFP, Toronto, Ontario, Canada Michaela Scott, CFP, MSFS, Methuen, Massachusetts, USA Benjamin Hok Hei Tam, Kwun Tong, Hong Kong Daniel Robert Turnwald, FICS, FICF, Glandorf, Ohio, USA Enith P. Velasquez, Lima, Peru Jin Myung Yoo, Seoul, Republic of Korea
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Colleen Schneider

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
CONNEXION ZONE COMMITTEE**

OBJECTIVE:

Plan and develop content for the Annual Meeting program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

Our initial objective is to be able to have enough potential speakers to make sure we can select the best presentations possible for our membership. We aim to put ConneXion Zone (CZ) presentations on a similar caliber of quality for our members as Focus Session (FS) have been for a very long time. We also have in mind we want the CZ to be the platform for new and fresh speakers. We are very excited about a new and rebranded marketing strategy to promote CZ presentations prior to the Annual Meeting. Our strategy towards meeting our objective is to be very collaborative with our FS and Global Markets' peers in order to have as many potential speaker recommendations as possible.

DIVISIONAL VICE PRESIDENT COMMENTS:

Miguel is doing a very good job, and he is absolutely correct in his observation that Brad Elman has been pulling up his jockey socks a little higher than average to the betterment of the team. I also believe Miguel's comment that it would benefit the CZ team to have greater representation from language specific [LS] captains. However he and Katy are earning their (racing) stripes as they strive to top up the list of potential LS speakers.

Miguel Mejia fully understands his role as CZ Chair. He understands his team was "boxed in" along the rails early on, but he has used the crop in the past several days to spur them on and close ground with the other teams. Fortunately this team has a slightly longer trajectory before final participants must be confirmed as they are all member speakers.

There has been a shortage of language specific speaker names submitted for CZ which is currently leaving a shortfall in certain languages. Miguel and Katy P. are aware of this and working with MCC for the various language specific zones that are in need of additional speaker names. They are also reaching out to Focus Sessions to get the contacts for any member speakers who were not selected by this team.

At this juncture the CZ shortfall is the greatest, and almost the only overall issue needing to be addressed. That said I am confident the proactive work of the CZ team, from Miguel, Katy and the captains will provide the desired results shortly.

CHALLENGES TO CONSIDER:

Our main challenge so far has been to receive enough potential speaker proposals in time, from the international market. Only Spanish potential speaker proposals have exceeded our initial expectations in time. We are expecting more proposals to come in over the coming week(s). I believe this challenge we face is linked to the fact that we don't have enough international captains on our team and we do have a lot of international speakers slots to fill in.

OPPORTUNITIES TO CONSIDER

Katy liaising with FS team and Global Markets department to make sure we get sufficient names and proposals to fulfill our objectives. We have a great captains team starting to review and work with the selection of our 2020 AM CZ Speakers.

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM DEVELOPMENT DIVISION
CONNEXION ZONE COMMITTEE**

MEMBER RECOGNITION

Brad Elman is going the extra mile trying to extract the best over every situation that arise and being very focused on bringing excellence to every part of our process. Also Janet Ng is showing extraordinary effort and commitment in trying to find enough international potential speakers to the team.

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Craig Alan Lilley, CFP, CLU, Hillsdale, Ontario, Canada
Chair:	Claudio Miguel Mejia, Punta Del Este, Uruguay
Captains:	Eugene Bozzi, LUTCF, Egg Harbor Township, New Jersey, USA Brad Elman, CLU, ChSNC, Los Altos, California, USA Anthony G. Engrassia, ChFC, LUTCF, Rocky Mount, North Carolina,
USA	
	Janet N. Ng, FChFP, CEPP, Makati, Philippines
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Katy Przybytek

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER LOGISTICS COMMITTEE**

OBJECTIVE:

Organize the volunteer support for the general arrangements of the Annual Meeting program.

CHAIR SUMMARY:

Special emphasis was made on expectations and their duties and responsibilities as directors as well as the need to pre-clear acceptance of any onsite activities such as speaking that may impact their roles and duties as directors.

A series of communication via emails and tech apps to keep the enthusiasm and excitement level of the team at a high with regards to expectations and upcoming tasks prior to the Directors Orientation set 3rd week of next month and even beyond were made. We actually set up a chat room on WhatsApp to keep everyone in the loop of any development.

All three director positions are now filled. The action plan above played a big role in making sure that the member's concerns were properly and promptly addressed. It resulted in her making a very confident and informed decision to accept the invitation and serve in Anaheim.

DIVISIONAL VICE PRESIDENT COMMENTS:

This committee is comprised of a Traffic General and two Traffic Sessions teams. Although all three directors are first time directors, Chair Dodo will be taking a proactive role in mentoring. He is a seasoned chair as well as a passionate PGA leader. Logistics teams will experience dynamic and positive volunteer recruitment activities.

CHALLENGES TO CONSIDER:

The biggest challenge foreseen would be the recruitment of experienced and capable assistant directors whose primary task would be to recruit member volunteers attending the Annual Meeting. Given the uncertainty of which meeting they will be attending, there will be hesitancy to accept the invitation as the decision will have to be made seven months before the actual meeting. This is further compounded by the challenge of their doing effective recruitment if the members are not yet decided which meeting they will attend at the early stages.

Combining the PGA Leadership Orientation meeting with the site visit which is normally scheduled March of the following year closer to the Annual Meeting could provide very useful information at the early part of the planning. But the other side of the coin is that the information might be outdated and major changes may have to be made as the Annual Meeting approaches.

Advice has been sent to the directors to implement the same system and process made to recruit them as director and reach out to the assistant directors once the invitations are sent out in late November. This should enable each task force to complete their team of ADs and start recruitment by early December.

The pool of potential volunteer recruits to serve at the Annual Meeting especially from Asia due to the Dubai Global Conference scheduled in September 2020 may be reduced but with active recruitment by the assistant directors, once in place, the team should be able to gather enough volunteers needed to accomplish the objective of the committee.

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER LOGISTICS COMMITTEE**

OPPORTUNITIES TO CONSIDER

As all three directors are first time directors as far as the Annual Meeting is concerned, there is a great opportunity to mentor and raise new leaders within the PGA structure. The continued explosive growth of MDRT especially in Asia outside the traditional North America allows us to enlarge the pool of potential leaders for the committee with specific language skills needed going forward as MDRT becomes even more international in membership and scope as we clearly identify these potential leaders through a more effective and improved evaluation process that is understood and embraced at the director and assistant director level.

The deliberate move to develop the skills of the selected leadership team at the director and assistant director level by exposing them to different task forces where they have very little exposure, while requiring some initial coaching will result in more well-rounded leaders with experience in the different task forces of PGA. The upcoming directors' orientation at the actual meeting site should ensure that the directors leave the orientation with clear and precise marching orders on what needs to be stressed and highlighted to the assistant directors is important in shaping how the team will perform in Anaheim.

MEMBER RECOGNITION

None at this time.

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Yuka Nakahara-Goven, MBA, CLU, Dallas, Texas, USA
Chair:	Manuel Dy Chuaunsu, Jr., Makati, Philippines
Staff Liaison(s):	Jeanne Malone, CMP and Anne Dignan, CMP

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER ENHANCEMENT COMMITTEE**

OBJECTIVE:

Organize the volunteer support for the general arrangements of the Annual Meeting program.

CHAIR SUMMARY:

We will be having our initial meeting in November at the site visit to discuss our plan to make the meeting wonderful for our members/attendees. We will design a plan of action to determine the correct number of volunteers we will need for Main Platform traffic and a schedule for how we will handle the work load.

We will take the time to explain the role of Meeting Involvement with the other directors. Our objective is to not have to recruit members on site and we would like to be able to have this completed before we arrive.

Both directors have accepted the role and are excited to be involved. Both are eager to get started and we will be using social media to help increase our number of volunteers. Next steps will be to coach our directors into being and becoming great leaders. We will be looking for them to coach our assistant directors as well. Our goal this year is to find our replacement and to have fun.

DIVISIONAL VICE PRESIDENT COMMENTS:

Under Brad's leadership, the Meeting Involvement Task Force will further define its pre-meeting recruitment role to accurately address the global volunteer needs.

CHALLENGES TO CONSIDER:

No challenges at this time. I believe that we will have some challenges in recruiting volunteers based on the additional Global Conference meeting that has been added. However, I know we can and will overcome any challenge.

OPPORTUNITIES TO CONSIDER

We have an opportunity to reach out to first time attendees that attended the Annual Meeting or the Global Conference Meeting for the first time and help them become a volunteer for either meeting.

MEMBER RECOGNITION

None at this time.

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Yuka Nakahara-Goven, MBA, CLU, Dallas, Texas, USA
Chair:	Brad J. Myers, Sandy, Utah, USA
Staff Liaison(s):	Jeanne Malone, CMP and Anne Dignan, CMP

**PROGRAM DEVELOPMENT DIVISION
ANNUAL MEETING PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER SERVICES COMMITTEE**

OBJECTIVE:

Organize the volunteer support for the general arrangements of the Annual Meeting for Registration and the MDRT Store.

CHAIR SUMMARY:

1. Once we have our initial call with the DVP, I will schedule a call for the Directors of the Store and Registration. We will contact our ADs, welcome them to our team, and get the ADs to start working on recruiting volunteers in January when people know that they have qualified.
2. Since both Tim and Ruby have been directors before, I will encourage them to work their network of previous volunteers and let them know the new volunteer opportunities.
3. I will share with them the benefits of on-going communication with their ADs. This is something I learned during my time as a director.
4. There have been no discussions yet other than congratulatory emails welcoming them to my team.

DIVISIONAL VICE PRESIDENT COMMENTS:

As Lesley is new in her role as a Chair, mentoring her is one of my priorities. Two experienced directors are supporting her and the overall team will meet expectations and goals.

CHALLENGES TO CONSIDER:

1. Recruiting volunteers can still be a challenge, especially since the store and registration open on the Saturday before the start of the meeting. I believe that if we contact the members who have volunteered for us in the past (and who we have confidence in their abilities), we can get more qualified people signed up before other groups get them.

OPPORTUNITIES TO CONSIDER:

1. Working with Meeting Involvement early on to let them know what languages we need as well as the number of volunteers.

MEMBER RECOGNITION

None yet.

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Yuka Nakahara-Goven, MBA, CLU, Dallas, Texas, USA
Chair:	Lesley E. Weiner, ChFC, CFP, Totowa, New Jersey, USA
Staff Liaison(s):	Jeanne Malone, CMP and Anne Dignan, CMP

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
MAIN PLATFORM/SPECIAL SESSIONS COMMITTEE**

OBJECTIVE:

To plan and develop content for the Global Conference program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

To develop a program for our global members, we have to first be aware of the difference (perhaps not a small one) in the development of the financial planning industry in various countries, the products/services available, the medical system, current social welfare support by the governments, medication preferences, the positioning/recognition of our practitioner, the extent people accept insurance concepts, etc, among different countries. And this made our Focus Sessions and ConneXion Zone sessions even more important and valuable, where members could share practical experiences according to their own culture and countries' situation. Thus for Main Platform, it is good positioning to introduce and enforce the core values of MDRT, bring more insights in relation to human connectivity, A.I. threats versus opportunity, community versus individual, mental healthiness, life purpose, environmental issues, etc, which have also become global issues.

Regarding selecting speakers, there is a point to note if the speaker were globally recognized, as the speakers we used to see in Annual Meeting were mainly from the USA or other western countries. And if the speakers could share his/her idea in a global sense, say using reference from global figures, giving more global examples.

For members from Asia Pacific region, still a large portion are tied-agents, thus the engagement of individual insurance company would be very useful to promote MDRT, not only as a "production recognition," but more importantly to promote the application of MDRT values to workplace and their community. There is also a tendency for tied-agents to stay with their leaders or their company's event, especially for first-timers. Thus we could consider introducing more mingling activities in the First-Timer program, provide them more ways to bond with the big MDRT family, which in turn encourages them to continuously qualify and attend Annual Meeting or Global Conference.

There seems to be an emerging group of young leaders, female leaders in recent years, probably could have some topics/sessions sharing about leadership, identifying the type of leader, the way of leading, etc. (we do have lots of books/talks on the "traditional" type of leadership e.g. led by experienced leader)

DIVISIONAL VICE PRESIDENT COMMENTS:

A good identification of the role of content importance for the Main Platform/Special Sessions keeping in view of the other Focus Session and ConneXion Zone providing content on ancillary growing areas while Main Platform retains the MDRT core value propositions.

CHALLENGES TO CONSIDER:

- Language barrier and cultural differences among the diverse group of increasing global members
- The discrepancy in the understanding of MDRT meaning and values
- Regarding MDRT Foundation nomination for Global Conference, is it still a must to be a charity registered in the USA
- MDRT mentorships concept seems not very popular among Asian members, perhaps they aren't familiar with the program, or there is a language barrier

OPPORTUNITIES TO CONSIDER

Through attending Global Conference, members could have a greater sense of being part of a "global community," the world issues we are facing/going to face, thus their responsibilities. Inspires them to be the "greater me" and bring back ideas to implement in their own communities. Perhaps set up some kind of collaboration work among various countries (sorry, cannot come up with concrete idea yet).

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
MAIN PLATFORM/SPECIAL SESSIONS COMMITTEE**

At Global Conference, with a more diverse group of MDRT members, it might be a good chance to bring in more diversity to MP/SS (nationality, language, topics, gender, age/generation, etc.)

MEMBER RECOGNITION

- **Shane:** he has a strong sense concerning for non-English members, e.g. whether the translations are good enough for members to get the speaker's real message
- **Caroline:** first time working with PDC, she is very task-driven and usually has work completed well ahead of deadlines
- **Amy:** first time working with PDC, she picks up rather quickly and out spoken to speak her views
- **Kathleen:** well experienced working in PDC, but she is not confined/limited by her experience, rather open to learn the difference in members attending GC and AM

PARTICIPANTS

ExCom Liaison(s):	Ian James Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Rajesh Chheda, ACA, CFP, Panaji Goa, India
Chair:	Tse Pui Chi Jacqueline, Kwun Tong, Hong Kong
Members:	Kathleen R. Benjamin, CFP, CPA, Timonium, Maryland, USA Caroline Kheng, ChFC, Singapore, Singapore Seung Bong Shane Lee, Seoul, Republic of Korea Amy Siu, Causeway Bay, Hong Kong
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Norah Webster, CMP

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
FOCUS SESSIONS COMMITTEE**

OBJECTIVE:

To plan and develop content for the Global Conference program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

Key Points:

- Estimate number of participants from various countries with different language mixed
- Selection process with limited time and discussion
- Enough speakers for back up
- Communications with speakers after
- Control of deadline

Initial Plan of Action:

- Appreciate HQ to provide the summary of participant's data from Sydney for study
- Assistant chair to call each captain to have a brief introduction of their selected speakers about topic, content and sharing experience in upcoming telephone conference calls
- Ask for at least 10 selections with ranking (four for back up)
- Provide clear explanation and guideline for follow up communication with selected speakers

Highlights:

- Suggestion from captain and assistant chair : Joint language panel for Japanese and Korean; Japanese and Thai

DIVISIONAL VICE PRESIDENT COMMENTS:

Good start to the focus sessions by Jenny and Izumi's panels. Soon the tone will have to change to blending all the speakers and topics to align with the requirements of the Global Conference in toto.

CHALLENGES TO CONSIDER:

- Workload for English Captain Harpreet
- Not enough Korean speakers

OPPORTUNITIES TO CONSIDER

Building a world class MDRT community/event in Dubai

MEMBER RECOGNITION

Our two assistant chairs, Jenny and Izumi, are both very responsive and caring leaders with speedy reactions and a lot of good ideas toward our goal!

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
FOCUS SESSIONS COMMITTEE**

PARTICIPANTS

ExCom Liaison(s):	Ian James Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin
DVP:	Rajesh Chheda, ACA, CFP, Panaji Goa, India
Chair:	Tse Lap Yee Stanley, Kowloon Bay, Hong Kong
Assistant Chairs:	Izumi Osada, Saitama-ken, Japan Yeoh Tan Fung, RFP, Petaling Jaya, Malaysia
Captains:	Harpreet Atwal, Dip FA, BSc (Hons), Solihull, United Kingdom Watchara Intharatchat, Bangkok, Thailand Shalini Kohli, Haryana, India Suet Yee Kwok, Quarry Bay, Hong Kong Leung Wai Ming Patric, Kowloon, Hong Kong Jae Seok Park, Seoul Republic of Korea Timothie Williamson Sy, Bacolod Philippines Fang Xie, Shanghai, China Chie Yazawa, Tokyo, Japan
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Valerie Fontanetta

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
CONNEXION ZONE COMMITTEE**

OBJECTIVE:

To plan and develop content for the Global Conference program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

CHAIR SUMMARY:

Initial plan of action:

1. Way of communications of our Oasis team is using WeChat (group) and ZOOM (conference call). The Oasis will have a conference call once in a month every third Wednesday at 8 a.m. (Central Time).
2. The Oasis agrees to have three types of ConneXion Zone (CZ), with total of five speaker zones. There will be three Speaker Zones (which will be called as “Majilis”). Secondly there will be one Ideas Bar (which will be called as “Ideas Souk” which use “standing-bar” style). Those four speaker zones will have 30 minutes presentation (including Q&A) for each slot with 15 minutes transition time between speakers. Thirdly, we also provide one Big Conversation Zone (which will be called “Ask Genie”) designed for greater capacity with longer time of speaking (maximum 45 mins, including Q&A) as well as to provide overflow area from those either Main Platform speakers or Focus Session speakers who might need extra time to connect with and thus, this “Ask Genie” area will not be programmed everyday.
3. As we have described earlier that the CZ in GC would much likely have Arabian style with the Dubai dessert and camel (if it is possible).
4. We would likely give the opprtunities among the MDRT members, those who have experienced speaking engagement as well as those likely to be their first time speaking experience in our MDRT meetings (NOT first-time member).

Highlights:

We have received more than 90 CZ - specific proposals from speakers who plan to attend the Global Conference, which are broken down in the following languages: English (44), Spanish (16), Mandarin (21), Cantonese (7), Japanese (1), Korean (4), Thai (3).

Many of these proposals have come through right before the deadline, and more have been submitted over the previous weekend, so many of the forms are being translated and prepared for review in preparation for the November meeting by MDRT Staff (Katy).

As of now, the English proposals have been uploaded into Dropbox, but many of the non-English forms still need to be translated for the appropriate GC Captains, so those won't be uploaded in the Dropbox until this following week. Meanwhile, the Focus Sessions team is making their final selections, so we may be potentially reviewing some of the non-selected proposals from their group to be invited as CZ speaker. Captain proposal evaluation forms will not be due until the end of October.

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM DEVELOPMENT DIVISION
CONNEXION ZONE COMMITTEE**

DIVISIONAL VICE PRESIDENT COMMENTS:

Well lined up channels and uniqueness of the desert flavors with names like Oasis, souk, etc.

CHALLENGES TO CONSIDER:

One challenge is to prepare and groom those first-time speakers in MDRT (NOT First-Time member) to speak at the “OASIS” ConneXion Zone. Another challenge we would likely face is the total number of candidates who agree to speak in Dubai.

OPPORTUNITIES TO CONSIDER

We are still anticipating several more proposals to be coming in after deadline, and we are still waiting on a list of additional Japanese, Thai, and Indonesian names from MCC to send out additional invitations to.

MEMBER RECOGNITION

Each member in our Oasis team is so excited accepting this challenge and being responsible. We are ready to prepare as well as “to cook and to serve the exquisite meals” for the festivities in Dubai 2020. As I believe all members of our team are so excited to enhance the ability to create member sharing opportunities in the ConneXion Zone.

However, in this opportunity I would like to address Pearlyn Koh, who shows her proactive and bigger concern upon her role as CZ Captain. She has gone above to send more potential speakers to our zone. I would also like to address my appreciation and gratitude to Katy Przybytek who has been very supporting and being proactive during our preparation and selection process of CZ speakers to success of our zone in Dubai. Thank you.

PARTICIPANTS

ExCom Liaison(s):	Ian James Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Rajesh Chheda, ACA, CFP, Panaji Goa, India
Chair:	Herold Chen, CFP, Jakarta, Indonesia
Captains:	Chan Hyun Baek, Seoul, Republic of Korea Pearlyn Koh, ChFC, Singapore, Singapore Henry Sei Yan Wong, AFP, RFC, Quarry Bay, Hong Kong Glory Xavier, Dubai, United Arab Emirates
GCM Liaison:	Jess Jurasz and Jeanne Malone, CMP
Staff Liaison(s):	Katy Przybytek

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER LOGISTICS COMMITTEE**

OBJECTIVE:

Organize the volunteer support for the general arrangements of the Global Conference program.

CHAIR SUMMARY:

Currently I'm still waiting the final name for leadership position (Director and Assistant Director) from DVP. Whoever is chosen, I believe they will be qualified and capable to do job as director and assistant director.

We will have a PGA Leadership meeting onsite in January and we will plan accordingly after we have done the meeting. I believe the meeting objective is to determine number of volunteers needed, schedule and also some post related to Member Logistics Task Force.

DIVISIONAL VICE PRESIDENT COMMENTS:

I am going to have a DVP Orientation in late October when I will finalize the committee leadership recommendations for each position, I will also establish the initial operation materials for the 2020 MDRT Global Conference.

Glen was a helpful leadership when he was a Director in Traffic General 1 in the 2019 MDRT Global Conference. His performance caught my eyes. He is young, energetic and I believe his passion can inspire more youth global members towards to us.

Building up a youth leadership is one of my challenges. I will give our youth members guidance along the way by using my past experiences and what I have learnt from MDRT. This is one of my missions.

Another challenge is to build more new Asian members to be a leadership for the future MDRT Global Conference.

Summer in Dubai is extremely hot (temperature can probably reach 45 °C), which is one of the challenges for Member Logistics. Also, I have searched from google map, the hotels MDRT commonly used has a distance from the Convention Centre, which is also our challenge.

CHALLENGES TO CONSIDER:

None at this time.

OPPORTUNITIES TO CONSIDER

During MDRT Global Conference 2019 in Sydney, Meeting Involvement Task Force got list with names and details of members who want to become volunteers in upcoming MDRT events. I hope this can help a lot in recruitment process.

MEMBER RECOGNITION

None at this time.

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER LOGISTICS COMMITTEE**

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Pecky Wong So Ping, FChFP, MBA, Quarry Bay, Hong Kong
Chair:	Glen Alexander Winata, Jakarta, Indonesia
Staff Liaison(s):	Jeanne Malone, CMP

**PROGRAM DEVELOPMENT DIVISION
GLOBAL CONFERENCE PROGRAM GENERAL ARRANGEMENTS DIVISION
MEMBER SERVICES COMMITTEE**

OBJECTIVE:

Organize the volunteer support for the general arrangements of the Global Conference program.

CHAIR SUMMARY:

Directors will be selected soon. Once the selection is completed, I will reach out to and communicate with them accordingly.

I will build good teamwork with DVP and Member Logistics, using my experience as a Member Logistic Chair at last year Global Conference. In addition, I will make use of my past experience as a Director of Registration, MDRT Store and Meeting Information.

DIVISIONAL VICE PRESIDENT COMMENTS:

I have cooperated with Miki for many times, we cooperated in perfect harmony when we both were PGA Chairs in the 2019 MDRT Global Conference. He has sufficient experiences in PGA Member Service and I have full confidence in his performance and organizational skills.

I am going to have a DVP Orientation in late October when I will finalize the committee leadership recommendations for each position, I will also establish the initial operation materials for the 2020 MDRT Global Conference.

CHALLENGES TO CONSIDER:

As Speaker Relations Task Force disappears and MDRT Store Task Force is scaled down, we need to keep in mind the appropriate personnel placement, including leadership positions.

OPPORTUNITIES TO CONSIDER

After selecting Directors and ADs, we will share the changes above with everyone and discuss how we can contribute to PGA.

MEMBER RECOGNITION

None at this time

PARTICIPANTS

ExCom Liaison(s):	Ian Green, Dip PFS, London, England, United Kingdom
Global Council Member:	Juli Y. McNeely, CFP, CLU, Spencer, Wisconsin, USA
DVP:	Pecky Wong So Ping, FChFP, MBA, Quarry Bay, Hong Kong
Chair:	Hidenori Miki, TLC, Yokohama, Japan
Staff Liaison(s):	Jeanne Malone, CMP