

Guidelines for Planning a Joint Meeting

Before Event

1. Determine meeting location (their location, our location or neutral location).
2. Determine meeting date, time and schedule of events. (Their date or our date, probably will correspond with who's hosting the meeting)
3. If we're hosting, verify that our location can host that number of people on that date.
4. Discuss the types of food each group is used to. Not specific food at this point, but in general terms. If very different, come to agreement on what it will be for this event.
 - a. Do they have dinners or appetizers?
 - b. Do they have wine?
 - c. Are they used to super fancy meals or just a cheese ball and crackers?
5. How does their fee structure work? Come to an agreement on how it will be handled for this event.
 - a. Will there be any profit?
 - b. How will that be divided?
 - c. How will the cost of the speaker's dinner be handled?
6. Determine how costs will be addressed and exactly when and how money will be exchanged.
7. Determine if will use separate or joint registration tables. Separate has worked well. If the fee structures are different, they definitely should be separate.
8. Will each group handle their own organization's RSVP's? (Worked well for previous event.)
9. If separate RSVP's, determine deadline for other organization to respond to us. Confirm that they will cover the cost of their final RSVP number even if there are no shows.
10. Determine internally who will provide final count to individual coordinating with hotel.
11. Talk about having membership applications or special things such as the book marks for both groups at both sign-in tables for cross-organizational advertising.
12. Discuss program announcements; determine when information needs to be exchanged.
13. Discuss if it's okay to have tabletops and raffle or any other fundraising event. Discuss if they have anything that they would like to have accommodated or if they have any special requirements.
 - a. Do they want to have some tabletops or a raffle as well?
 - b. Do they have a banner to display or need a table to display information about their organization?
 - c. Do they have any business that needs to be taken care of?)

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14. Provide AV, tabletop and any other special requirements to individual coordinating with the hotel. (Should be done for all meetings)
15. Prepare flyer and send to other organization for review.
 - a. Are the logo and their name correct?
 - b. Are they okay with the content?
16. Distribute approved flyer to other organization as well as normal distribution.
17. Prepare schedule of events – Our introduction, other organization’s introduction, self-introductions, raffle, speaker introduction, etc. This may seem simple, but since there’s more people involved, this helps everyone to know what’s happening when, especially if we want to have time for self-introductions. Email to any involved including other organization.
18. Prepare ‘script’ for president: Introduce CSI, welcome the other organization, provide president with phonetic pronunciation of the name of the other organization’s president and how to introduce the organization. Email to president.
19. Prepare special meal tickets to give for vegetarian meals or to use if multiple meal choices.
20. Prepare introduction notes. (Should be done for all meetings, but more important when you’re speaking in front of 100 people.)

Day of event

21. Greet the individual(s) you’ve been coordinating with. Make sure they have what they need.
22. Give special meal tickets to both check-in stations, if needed.
23. Introduce the two presidents to each other. Run through the sequence of events with them. Make sure they have anything they need – schedule of events, ‘script’, etc.
24. Collect/distribute money depending on agreement of when and how it will be handled.
25. Have a great time!