Member Engagement Peer to Peer Discussion Group
March 27, 2013

**Participants**

Ross Ament, MA, CAE – Ament and Associates, Inc.

Shauna Barnes – EDI

Amy Bliss, CAE – Tomorrow’s Home Foundation

Jen Brydges – WSAE
Wendy Coe, CAE – The Rees Group, Inc.
Shelia Hilke – Radisson Hotel La Crosse
Melissa Montgomery – Wisconsin Director of Nursing Council

Ross Ament called the session to order. Everyone on the call introduced themselves. Ross mentioned the three resource documents that are attached to e-mails within the WSAE website. He thanked Wendy Coe for sharing these documents.

**Combined Meetings**

Meetings are becoming more and more expensive and difficult to arrange and charge enough to sometimes break even. More associations are looking at combining meetings with similar associations to bring more value to their members and potentially save some expenses.

**How do you out the wheels in motion:**

Wendy Coe explained that with one of her association’s partners, it has been a long term relationship of going to each other’s meetings, getting to know the other association, being invited to speak at meetings, etc. From that relationship, you can see if a joint meeting fits naturally.

Start a conversation to see how you can benefit one another. Wendy explained that it has been a struggle for the program committee to define the general structure of the program, but one person who is a member of both organizations has been helping to get everyone on the same page. If you can find someone who has a “foot in both camps” and understands the culture of both organizations as them to participate in the planning to help get people aligned.

**Board Culture:**

Wendy explained that her board is constantly looking for ways to expand knowledge and share what they know and this is part of their culture. They look for opportunities to share and learn. Some collaborations have taken a lot of time and persistence on part of the members, others have happened rather quickly. By holding a joint meeting, there is a hope that members of both associations will be provided with more information than either group would have had on their own.

Wendy noted that in looking to collaborate it should be from a position of strength, not just holding a joint meeting because you’re going to lose money, or not be able to hold the event.

**Agreement:**

Wendy used the ASAE resource site to find a joint agreement and then used that as the framework to create their own agreement, noting that the most important part of it is the chart of responsibilities and assigning those responsibilities. Wendy’s association had the agreement reviewed by the attorney who reviews site agreements for conference centers and hotels.

Wendy noted it is important to have a written agreement, without them it may get sticky when dealing with the money aspect at the end of the event.

Who signs the contracts?

Wendy: in our case, the two presidents’s signed the agreement with turning operations over to staff.

Jen Brydges mentioned that in regards to the WSAE/ASAE Golf Outing, staff signed the agreement.

**Tradeshow/Exhibitors/Sponsors:**

Amy Bliss explained that her organization is looking at holding a joint golf outing with someone who is likeminded to give vendors and sponsors a bigger bang for the buck. Amy noted that she reached out on the WSAE Connected Community and had one potential partner but it didn’t work out. She is still looking for the right group to connect with. Amy noted that there is value in having joint meetings and events if it saves members time, money, effort, reducing time out of the office, etc.

Wendy suggested that when looking at a strictly fundraising event, no one wants to compete for the same sponsorship dollars and organizations looking to partner with someone may want to look for a group that is somewhat related but not looking at the same providers and exhibitors. This would also be an opportunity to get the board involved and brainstorm to identify several groups that are related but not so much.

Wendy noted that both her association and the other that they are working with each have exhibit halls and each do fundraising. There will be a lot of crossover with the exhibit hall and corporate partners and the groups will need to work to address that and that it may be more appealing to sponsors to be in front of two groups at once.

Ross noted that joint meetings and tradeshows can introduce new topics and making something available to each meeting that wasn’t there before. PCMA has done this and could be a good resource.

Melissa Montgomery explained that she talked with two groups that have combined trade show and food functions but not education. Melissa noted that one group is a for-profit company who puts on an education conference to give people education credits and the other is a national association.

Some of the people in the company were on the association’s board which is why they looked to combine the event. The combining of vendors/exhibit hall space and food was able to save each group a little money and bring extra value to the vendors. They charged the vendors a little more than in the past because of the access to two groups. The money was simply split in half.

For food each organization paid per number of attendees that each group had. They did this for 2 or 3 years but aren’t doing it anymore because the association stopped having the annual conference in Las Vegas which is where the company held its event.

**Sustainability of co-meetings:**

Ross noted that joint meetings happen for bigger reasons than we’re losing money and attendance. It is important to evaluate the meetings and see what other benefits are coming out of the partnership with the other organization to evaluate continuing them.

Wendy noted that her group has smaller partnerships that occur at meetings on a yearly basis, however the larger partnership was entered into with the thought of doing a combined meeting every 4 or 5 years.

**Where to hold the meeting?**

Wendy mentioned that in her partnership, both organizations have members throughout the US and internationally. The group was looking for an airport hub in a location that wasn’t terribly expensive. After a great deal of discussion, the group will be in Minneapolis/St. Paul which has an international airport, a veterinary college and Mayo Clinic which the group has ties to. This location could provide some exciting and different ways to collaborate that haven’t happened in the past.

Shelia Hilke asked how guest room blocks were handled. Wendy noted that they had negotiated one guest room block, and the hotel will view both associations as one event.

**How do co-meetings impact member engagement?**

Wendy noted that the members will have the opportunity to network and meet new people that they may not have networked with before. Her meeting is looking at having 1/3 more attendance due to the fact it is a joint meeting.

Joint meetings also can reduce time out of the office for members, provide exposure to more vendors, provide more information and education, and save both the member and the association money.

In closing, Ross stated that notes from this session would be posted and sent to the group’s members. He asked that people submit ideas for the next discussion to him. He would schedule another call when there is a topic of interest.