Meeting planning basics: A guide for administrative professionals

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Meeting Planning Basics:
A Guide for Administrative Professionals

A professional paper completed for the completion of the Masters in Hospitality Administration degree

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PART ONE

Introduction

Planning meetings and events is a job function that requires skills and knowledge of the meeting management industry. In today’s economy and within many organizations across the globe, both corporate and association meeting planning is a job function that is frequently being seen as a task that an administrative professional can take on in addition to their other workload.

While in many instances this may seem like the most efficient and cost-effective route for organizations to undertake, in the long-run it can actually cost the organization more – in both time and money. In addition, it can lead to poorly run and ineffective meetings. Lastly, the lack of comprehension by the administrative professionals on how meetings are run can have a great impact on meeting suppliers in the industry. By having to take the time to educate their partners on key terms, contractual language as well as the basics of meeting planners, suppliers risk losing time and money on meetings and events that are not strategically thought out and planned.

Currently there are a multitude of training guides, manuals, certificate programs as well as degree programs available to learn how to plan meetings and events. For administrative professionals, however, in order to quickly undertake the task of creating a successful meeting or event for their organization they may not have the time or money to spend in enrolling in certificate programs or reading these thorough documents.
This paper includes a literature review of current meeting management training manuals available, and utilized within the industry, as well as trade publications; extracting from them common themes and the basic tools necessary to quickly and efficiently learn how to plan a meeting and event. A chart summarizing the contents of these manuals is provided in the appendices. In addition, qualitative interviews were conducted with current corporate administrative professionals within various corporations tasked with meeting planning, to inquire and extract information of real-need meeting planning for them to effectively conduct their jobs.

Purpose

The purpose of this paper is to create the foundation for a practical and useful reference tool for administrative professionals to utilize in their current jobs.

Statement of Objectives

The reference tool will consider and potentially include the following objectives:

a) Provide a quick-glance, step-by-step guide that will require minimal learning time so they can continue to focus on their current workload;

b) create a more efficient process for them to incorporate meeting planning into their current job;
c) potentially save the organization dollars in offering knowledge on the basic meeting planning skill-set that can help to reduce meeting expenses;

d) create easy-to-use tips and tricks as well as additional references that administrative professionals can utilize at their leisure; and
e) provide a better planner/supplier partnership for the administrative professionals in working with meeting venues by offering key definitions of common industry terms as well as a basic overview of working with meeting venues.

Justification

By the end of this study, administrative professionals will have a condensed version of the basics of meeting planning available to them for quick use and integration into their job. In addition to the overview of the basics, the reference tool will include key glossary terms, additional resource tools and recommendations on ways to acquire further education within the industry. This modified and condensed guide is being considered as an educational instrument for use in Meeting Professionals International’s educational tools as both an education platform and reference booklet to be available to administrative professionals involved in meeting planning.

Constraints

Due to the multitude of current manuals and training guides currently available for review, the literature review conducted in this paper has been limited to a maximum of twelve (12) currently published meeting industry guides and
manuals that have been deemed by the author to be the most relevant and probable resources that an administrative professional would potentially utilize to assist them in planning meetings and events. In addition, it is noted that very little academic research has been done and therefore, the review of materials focuses on more generics of the industry including trade press related content.

Lastly, for purposes of reviewing the literature in Part Two, as well as the need for comparison on the basics of meeting management, the author (a current member of the meeting management industry with over thirteen years of experience) has taken the liberty to define the basics of meeting management as: (a) contracts/negotiations, (b) site selections/request for proposals [RFP’s], (c) meeting logistics, (d) food and beverage, (e) audiovisual, and (f) budget/billing, and therefore, the final summarization of the content as shown in the appendices should consider this coder bias.
PART TWO

Literature Review

The Literature Review, Part Two, was conducted with guides and manuals, determined by the author to be relevant resources potentially used by administrative professionals. The review looks at these materials from the basis of an administrative professionals’ need and the resources’ ability to cover the basics of meeting management required to plan meetings and events, its ability to provide recommendations for additional industry information and further knowledge-base, and the current resources feasibility as a relevant useful tool.

The guides and manuals were divided into the following categories for purposes of the review:

1) Administrative professional specific (materials readily available and specifically geared toward administrative professionals and their careers).

2) General knowledge (materials published as a general knowledge geared toward a multitude of individuals including meeting management professionals, but are not officially endorsed by the meeting management industry).

3) Meeting management-industry endorsed (materials endorsed, and in some cases, published by meeting management industry organizations and/or associations).

*Administrative professional specific*

Administrative professional specific books are inclusive of training and references that administrative professionals require to do their job. Therefore, as
seen in the *Administrative and Secretary’s Handbook* (Stroman, 2003), much of the book is dedicated to anything office related. This includes office machines, office ergonomics, email, spelling, and desktop publishing. A chapter of the guide is dedicated to meetings. In essence the layout of this book and the multitude of items it covers is an example of an administrative professional’s job and the function that a meeting plays within that role. It is one of many job functions that an administrative professional handles.

The chapter on “Meetings” defines the administrative professionals’ main role with meetings as someone who “…is to send out notices, invites and take minutes of the meetings” (Stroman, 2003, p. 91). Therefore, much of the chapter is dedicated to office meetings from the perspective of arranging meetings utilizing Microsoft® Outlook® and Lotus Notes® as well as the administrative professionals’ role in those meetings as official scribe, to take the minutes for historical and reference purposes. The chapter defines various types of meetings an administrative professional may have to plan which include annual stockholder meetings, corporate and director’s meetings, and other company meetings (Stroman, 2003). Missing are the multitude of other types of meetings and conferences potentially planned by administrative professionals.

Near the end of the chapter, there is some detail provided on planning conferences, which the book differs from a meeting. The detail lists the administrative professionals’ responsibilities for a conference to be, “…preparing for the event, carrying out your responsibilities during the conference, and follow-up on activities after the conference” (Stroman, 2003, p. 102). The chapter does
list items that are required to plan for the conference including: (a) booking conference site; (b) blocking room reservations, hotel rooms, selection of room sizes and price range; (c) confirming auditorium sizes and breakout rooms; (d) scheduling catering and beverage service; (e) confirming smoking locations; (f) inspecting facilities you haven’t seen before; (g) sending letters of invitations to speakers; (h) following up with confirmation letters to the speakers and conference site personnel; and (i) obtaining background information, photos, and resumes of the speaker (Stroman, 2003).

Overall the book provides a very broad view of the types of tasks involved with planning meetings and conferences and neglects to focus on the specific basic requirements of planning a meeting which include contracts/negotiations, site selection/RFP’s, food and beverage planning, audiovisual as well as budget and billing.

The book assumes the individual already knows the basics of meeting planning including what the key industry terms are and gives broad brush strokes on the general guidelines and steps required with planning meetings. It is not a useful guide on how to actually plan for the meeting.

As one of the “Take Charge Assistant” books, Planning Successful Meetings and Events: A Take Charge Assistant Book (Boehme, 1999) was written specifically geared toward administrative professionals. Due to its entire dedication to the topic of planning meetings and events is one of the better tools readily available for administrative professionals in regard to meeting planning knowledge.
In the beginning, the book does a good job of laying the groundwork for an understanding of what a meeting is by listing out up to nineteen different types of meetings that can be planned. However, throughout the book much of the author’s writing focuses on author history and anecdotes of experiences the author went through. Although it is good to learn through another’s experiences or missteps, this type of learning does not make for a quick reference on specifics.

Boehme (1999) does a good job covering the basics of contracts/negotiations by including contract clauses commonly used in the industry. Also there is thorough coverage on site selections and RFP’s, as well as food and beverage, audiovisual, room lighting, and budget and billing. But, the book goes into a lot more detail than just the basics. For example, there are sections dedicated to discussion on exhibits, VAT (value-added-tax), music licensing, and currency exchange rates, plus a few dozen other non-basic items. However, the book is rather outdated and does not take into consideration the advancement of current technologies as well as key contract clauses that have become standard in today’s industry.

For example, there are 41 contract clause examples listed and none of them cover the specifics of Force Majeure as we know them today to include acts of terrorism. Also within the site selection/RFP discussion of the book, the current relevance of online searching as well as online RFP databases, such as StarCite®, are not discussed since those types of software programs were not developed at the time this book was written. There is a reference to the internet in the section on site selection/RFP’s, “…the Internet is making some rapid changes
(although the value of ‘armchair’ or Internet site inspections remains to be seen and judged)” (Boehme, 1999, p. 28). Today, that thought has advanced by leaps and bounds and the internet has become a useful tool for the meeting management industry.

In summary, this book is more detailed than the other under this genre and more condensed for a quick read. It does offer good, useful and thorough checklists as well as a minimal glossary of key terms and resources for further information. But, it lacks in taking into account new technology currently used within the industry. If it weren’t for the outdated information within this book, it could potentially make a good reference for additional information within an even more condensed up-to-date reference guide.

General Knowledge

General knowledge books considered those books readily available that were written with a multitude of individuals in mind, including meeting planners; but were not endorsed by the meeting management industry.

The interesting thing about this genre is that the books that were reviewed, albeit one, contained all the basics of meeting planning, however, it was the process and layout in which they were written that limited their ability to be a useful quick reference tool for administrative professionals.

A Guide to Successful Meeting Planning (Weissinger, 1992), is truly an outdated book on the topic of meeting planning. It does cover all the basics of meeting planning, except contracting and unfortunately does not provide a glossary or definition of the key terms used within the industry. It was published
at the dawn of public internet usage and in reading through it the lack of advance
technology information, innovative planning software programs currently
available, and the multitude of references to meeting statistics from 1985-1990
show its lack of current, useful information. Possibly, the most blatant example
of being out of date is under the audiovisual section checklist (on page 147-148)
which lists a checklist of what audiovisual to consider for meeting. Listed are
antiquated audiovisual items, including a VCR, film projector, slide projector,
overhead projector, and tape recorder (Weissinger, 1992). At the time the book
was published it was probably a useful tool, but it is no longer relevant with the
other thorough guides and reference materials currently available.

Like most *Dummies*-brand reference books the *Meeting and Event Planning
for Dummies* (Friedmann, 2003), is a practical and thorough book on meetings
and event planning. However, it was written by an individual who works with
national and international exhibitors planning tradeshows and special events and
within the content the lack of meeting planner knowledge and experience input is
relevant. The book seems to skim the basics of meeting logistics in lieu of several
 chapters of in-depth content relating to exhibiting at home and abroad.

The book recommends itself for “…executive assistants, marketing
communication specialists, public relations experts, or (of course) meeting and
event planners…” (Friedmann, 2003, p. 2). It does provide useful tips on
negotiating, as well as common meeting mistakes to avoid and a very thorough
list of online references that cover varying meeting management topics. In
addition, there are eleven checklist examples from site selection to post-event evaluation that would be useful for an administrative professional to incorporate.

However, it is more likely set-up to be read and used by junior planners or those individuals obtaining a more formal education in meeting management, as it delves into topics that are more in-depth for full-time planners versus the type of meetings administrative professionals may plan. In addition, the book is written with a style and layout that lacks a clear, direct step-by-step process, and instead is broken down into seven main parts (one of which is the appendices section) regarding meetings and then sporadically drops in fragments of detail within each part in a random order.

For example, on page 206 within the chapter on the topic of technology there is an information box referring to Obi-Wan Kenobe, a character from the movie *Star Wars*, entitled “Help me, Obi-Wan Kenobe! You’re my only hope!” This information box is utilized to help explain digital teleportation and how it is available as a new technology. Possibly this section is more advanced than what is needed for basic meeting planning as digital teleportation is not a standard within the industry currently used by full-time professional planners.

On the other hand, one of the most important useful pieces of information shared within the book is in the contracting section where the book advises to seek a contractual lawyer to review and sign any meeting contracts. “This is not the time to have a proud, cavalier, ‘I can do it’ attitude.” (Friedmann, 2003, p. 175).
Although the book contains some useful morsels of information, and it covers all the basics of meeting planning; the book is written in a convoluted style with additional, potentially unnecessary, information for what an administrative professional needs in order to plan a meeting.

*The Complete Idiot’s Guides* are considered in the book industry a direct competitor to the *Dummies* series. *The Complete Idiot’s Guide to Meeting and Event Planning* (Craven, Golabowski, & Waldoch, 2006), does a good job in competing with the *Dummies* book by ensuring all the basics of meeting planning are covered. However, the *Idiot’s Guide* was written by two individuals who have combined meeting planning experience and industry knowledge of over 50 years. In addition, the authors collaborated and consulted with a meeting planner who has worked within the industry since 1978 and earned a Certified Meeting Professional designation (CMP) in 1995.

The book does a consistent job of covering all the basics and provides a small appendix of sample forms and checklists; the majority of which would be more useful to a full-time meeting planner than an administrative professional. But, the appendix of additional references and resources is a gold-mine of information that administrative professionals could utilize as a very comprehensive reference tool.

Differing from *Dummies*, this book is potentially a better reference tool as it is written in a more clear-cut, direct fashion with less random facts and anecdotes and more key-word tips, definitions and highlights of what is most important on certain topics. In addition, each chapter has a section at the end entitled “The Least You Need to Know.” This section, in essence, provides the basics in regard
to the chapter topic by referencing key items and providing the very least
information needed on that topic. For example, on page 185, at the conclusion of
Part 3 – Chapter 15 which deals with seating arrangements and room set-up, “The
Least You Need to Know” references the following four points (extracted from 11
pages of content):

1) Seating that allows interaction with other attendees promotes a better
   learning environment.

2) Understand your audience and your speakers so you can create the
   right learning environment.

3) Session monitors help keep your breakout session on track and let you
   know if something needs attention.

4) Establish policies on drinking, smoking and using electronic devices
   for your meetings (Craven et al., 2006).

By reading through just these sections of all the chapters, administrative
professionals would have a quick reference guide which could be useful for them.

Again, similar to the other books reviewed; this book is lengthy and would
take some time and dedication to read through. There are also a lot of additional
topics, outside of the basics, such as soliciting customers (from a supplier’s
viewpoint) to measuring ROI (Craven et al., 2006). These topics are more
relevant to a full-time meeting planner. However, this is a guidebook where
basics could be gleamed and easily extracted for inclusion in a more condensed
reference book to meet administrative professionals’ needs.
Meeting management-industry endorsed

There are many guide books and reference materials that are endorsed by meeting management industry associations, organizations and corporations. From the outset, it can be assumed that these guide books and reference materials are specifically geared toward full-time meeting planners and professionals within the industry and would potentially be too detailed and complex to meet administrative professionals’ basic educational need for planning meetings.

The American Society of Association Executives published a compilation of articles written about planning small meetings. The guide provides more of a discussion and theoretical view of meetings versus a specific, tactical view of planning small meetings. However, some articles touch on budgeting from the aspect of making the meetings cost-effective and provides tips on how to save money specifically noting, “…chances are you are going to have to pay some meeting room costs, since a small group seldom justifies a complimentary room. However, it never hurts to ask” (American Society of Association Executives, n.d., p. 7).

The booklet also has an article that provides specific insight on tips for ordering food and beverage and notes specific, useful information such as, “…you can figure 20 cups to a gallon [of coffee] is average” (American Society of Association Executives, n.d., p.7). Tips on seating arrangements – meeting logistics - are included and although some of the hints are useful they tend to be hidden within the articles; which are also outdated, as one article reminds you to
“…have a plan B if your slide projector doesn’t work” (American Society of Association Executives, n.d., p. 15).

A couple of articles near the end of the booklet do a fine job of highlighting some tips to ensure the meeting runs smooth as well as focuses importance on audiovisual – again, slightly outdated – however, emphasizing the importance of visuals needed to ensure the content is communicated to the attendees, as well as providing logistic information on viewing structures for the room. In the end, the reader cannot ignore the out-dated information with which the articles are written; specifically on new technology and the role of the meeting planner. One article references that, “…by 1985, we will be able to stay at home and get meeting information directly to us through technology” (American Society of Association Executives, n.d., p. 39).

In spite of this outdated information the booklet provides articles which contain useful information; the individual reading this, however, would have to read through all the articles to gather the bits of information that are useful. In addition, the booklet tends to focus on more strategic, philosophical views of meetings that administrative professionals more than likely would not be involved in; for example, how to be a good meeting facilitator, selecting committees and creating working groups (American Society of Association Executives, n.d.).

A unique industry endorsed guide is a creation by the Hyatt Hotels Corporation in their *Everything You Need to Know From A to Z Guide* for their hotel properties (Hyatt Regency Atlanta, 2003). These guides cover everything about staying at the hotel, working with the hotel and holding meetings at the
hotel - starting with “ADA/Accessible Accommodations” and ending with “Voicemail.” It is not necessarily a learning tool, but is an educational resource as it specifically deals with the hotel and is fine-tuned to each individual Hyatt hotel by providing hotel specifics, such as a quick-overview of the city where the particular hotel is located as well as the hotel’s history.

The guide doesn’t cover the basics of meeting planning from a general learning, education perspective; but does explain the basics for the individual planning the meeting on who to work with at the hotel and what the hotel requires. For example, under Audiovisual, the content provides information on what company is the in-house audiovisual provider, how to connect with them and a basic overview of the meeting room regulations as it pertains to audiovisual. It does not provide definitions on various types of audiovisual nor does it offer any tips on the other basics of meeting planning – such as, ordering food and beverage or how to negotiate. It does cover the hotel’s billing and contractual clauses as well as food and beverage contractual obligations, but again, not from the perspective of general meeting planning education, instead from the perspective on how to work with that particular hotel. For example, under the billing section it covers how you can pay your bill with the hotel and the requirements they have to set up billing; but it doesn’t help explain how to budget for your meeting. Under logistics it provides the capacity chart for the hotel’s meeting room space; but does not recommend the best seating arrangement for various types of meetings.
This type of guide would be useful for an administrative professional if they were planning a meeting specifically at one of the Hyatt hotels; and especially useful since it provides complete specific details about the hotel. It is completely irrelevant to an administrative professional not planning at a meeting at a Hyatt hotel and is not a generalized, thorough, useful educational tool.

Special note: The Hyatt’s guide rating on the comparison chart – shown in Part Three - is generous as it references the basic, author-defined, meeting management topics within the guide but doesn’t truly provide this information from a general educational basis but from what is applicable to a particular hotel.

A much more thorough and useful education tool is Meeting Professionals International (MPI) Meetings and Conventions: A Planning Guide with 2006 Updated Forms (2006). This manual is actually an educational reference guide that is used by meeting professionals studying and taking the CMP exam. MPI is one of the industry’s respected associations for meeting planners and suppliers and compiles the multitude of information and educational pieces required in meeting management within one large guidebook.

This reference manual contains much more advanced information than what an administrative professional needs for an understanding of the basics of meeting management. Conversely, this guide is useful in that it provides a glossary of standard terms, useful forms and also provides the information on a CD-Rom with guide information and forms available electronically. This information would be useful for an administrative professional to extract and utilize various pieces of the content.
However, because it is published by an industry association it is limited in the additional resources recommended and generally recognizes those resources that happen to be key partnerships of the association. Whereas, the general knowledge books such as *Dummies* (Craven et al., 2006) and *Idiots* (Friedmann, 2003) are not biased to particular industry references and basically list all major resources available on an unbiased basis.

Although the MPI (2006) guide provides complete information, it is mainly geared toward professionals with a career in meeting planning and education in the meeting management industry and not an easy to use reference tool for administrative professionals.

The Professional Convention Management Association’s Professional (PCMA) *Meeting Management: Comprehensive Strategies for Meetings, Conventions and Events (5th Edition)* (2006) guide is PCMA’s flagship resource and considers itself as an education tool for all levels, “…from the hospitality student preparing a class paper to the veteran meeting professional refreshing his/her knowledge about an individual topic…” (p. xi).

The guide covers the basics of meeting management, but again like the MPI guide, is too complex and detailed for the administrative professional planning meetings. This book is also considered a tool to be used for the CMP exam and like the other industry guides basics can be extracted and compiled into a condensed version. However, this book differs from the other industry guides in that a lot of the useful information for administrative professionals can be more easily extracted.
Within each chapter there are highlighted boxes titled “Put Into Practice” which summarize and create useful, direct actions that administrative professionals could utilize. For example, on page 404 of the guide, there is one of these boxes which takes note of “How much should you order?” in regard to ordering food and beverage for morning and afternoon breaks. It provides mathematical equations that base their numbers not only on the demographics of the audience (male versus female or 50/50 split), but also on the amount of coffee that is usually consumed in the morning versus the afternoon (PCMA, 2006). This type of straightforward information could be easily implemented by administrative professionals trying to determine how much coffee to order for meetings.

In addition, the manual has “Fast Facts” sections contained within each chapter which provide quick learning information. Generally these sections are highlighting an important fact of the chapter. On page 158, there is one of these sections about Site Selection and it lists the following eight steps:

1. Identify the meeting objectives.
2. Gather historical data.
3. Determine the physical requirements.
4. Consider the attendee interests and expectations.
5. Select destination and type of facility.
6. Prepare meeting specifications and a request for proposal (RFP).
7. Review and evaluate sites.
8. Select the site (PCMA, 2006).
Again, like MPI’s manual, it is a specific association published manual and therefore does not provide a complete listing of additional references and resources outside of key partnerships with the individual association.

An industry endorsed guide that is not biased in its additional resources and references is The Convention Industry Council’s (CIC): *A Working Guide for Effective Meetings and Conventions (8th Edition)* (2008). The CIC manual defines itself as being “…a working guide for meeting and convention professionals, as well as a study aid for candidates who are preparing for the Certified Meeting Professional (CMP) examination” (CIC, 2008, p. iii).

Just like the MPI and PCMA manuals, it offers complete and thorough information in regard to meeting planning and the meeting management industry, but again, the guide is more advanced and would be more time-consuming for administrative professionals to process through. The checklists offered, which cover the basics of meeting management, could be a good tool if extracted and compiled for administrative professionals.

Differing from the other two, however, is the guide is prepared by the convention industry and therefore the references and additional resources contained within the manual are not biased like the MPI or PCMA manuals, since MPI and PCMA are two members of the industry council’s 31 members. Unfortunately, the unbiased additional resources and references are provided sporadically throughout the book within each chapter topic versus an easy to read, readily accessible listing of the various references – such as a complete appendix in the back.
Part of the CIC’s initiative is that of the Accepted Practices Exchange (APEX) which is spearheaded by the Convention Industry Council (CIC, 2008). APEX is meant to unite the entire meetings, conventions and exhibition industry and was conducted with a faction of meeting professionals who dedicated their time on a volunteer basis. The goal was to create meeting management standards that will assist in time and cost savings for industry professionals, as well as creating a foundation on which meeting management can be based.

APEX is a standalone guide for meeting management and focuses on seven main areas (a) the industry glossary; (b) post event report; (c) event specifications guide; (d) housing and registration; (e) requests for proposals; (f) site profile, and (g) contracts (CIC, 2008, p. 3)

APEX also has easy to use templates currently available electronically as software that is available for purchase, including the APEX industry standard templates and forms. This software and the forms could be useful for administrative professionals, but, because it is created as a standard for the industry there is a presumption that readers are industry professionals and therefore, the level of basic education required in comprehending the information provided by APEX could potentially be higher than the basic knowledge level an administrative professional may have in regard to meeting planning. On the Convention Industry Council’s website www.conventionindustry.org, there are several templates available in both Word and PDF for free download. Also, there is an online glossary of terms that can be helpful in deciphering industry jargon.
APEX may not be a thorough educational tool for administrative professionals not only because of this presumption, but because the Council has determined not all meeting management information can be standardized. Therefore, not all meeting management basics are thoroughly explained for educational purposes through the APEX guidelines. In addition, the standards are a moving target and are constantly being updated, revised and changed on an on-going basis.

In the end, even though it is geared toward industry professionals, there are useful items for administrative professionals. From a philosophical perspective it would be good to have administrative professionals use the industry standardized basics from the beginning as it could help initiate administrative professionals becoming more involved within the industry, and if they did enter the industry they would already be working from the platform of the industry accepted standards.

The last industry endorsed reference guide reviewed was Conferon Global Services *Conferon Guide* (n.d.) as published in *Convene* magazine. Conferon Global Services is an industry specific organization and the guide was created as part of Conferon’s continued dedication to the industry in providing education-based resources (Conferon Global Services, n.d.). *Convene* magazine, an industry specific publication, published the guide for Conferon Global Services and due to these two facts – the creator and the publisher of the guide – there is concern on how administrative professionals would be aware of this guide. Therefore, there is some skepticism as to if this guide would be a relevantly used reference tool for
administrative professionals. However, this guide is potentially the most relevant and useful tool currently available for administrative professionals to utilize.

The guide consists of articles written by experienced industry professionals and does a thorough job of covering all the basics of meeting management. The articles generally are two-three pages at the most and easy to read. Each of the meeting management basic topics has several articles within that cover sub-topics of the main topic. For example, Chapter 10 of the guide is dedicated to Food and Beverage. Within this chapter there are six articles that cover the following sub-topics of Food and Beverage: (a) Negotiating F&B; (b) Menu Planning 101; (c) Controlling Receptions; (d) Planning Beverage Breaks; (e) Cutting Liquor Costs, and (f) Winning the Guarantee Game (Conferon Global Services, n.d.).

Since there is no glossary of key terms and definitions, some assumption is made that the readers already have basic meeting planning knowledge, such as what a guarantee is, or what RFP stands for. But, depending on how the article was written some of the information validates this assumption whereas other articles do a much more thorough job of explaining and defining the very basics. As an example, “Hints on Handling A/V” which is an article in Chapter 8 specifically spells out types of microphones to use providing definitions on what they are and why they are needed. The article also provides useful tips on lighting problems, additional audiovisual tips and information on when an audio technician is needed to be hired (Conferon Global Services, n.d.)

Chapter 7 of the guide discusses meeting room set-up and the first article on how to decide on meeting room design, provides basic and detailed
information which would be beneficial to be extracted and provided to administrative professionals.

As stated, though this guide could be considered one of the most useful and relevant references available to be used, there are the items that presume some basics are already known. Therefore it would be recommended that the very basics which lack this presumption of advance knowledge, be extracted and provided in a more condensed version. The complete version of the Conferon guide could then be a recommendation within the condensed version as an additional reference.

Conclusion

The literature review provided the opportunity to review current manuals, guides and books currently available which administrative professionals may utilize in learning how to plan meetings as part of their job functions. By reviewing the content from the perspective on the basics an administrative professional would need to know, it can be concluded that at this time there are a wealth of materials available. However, much of the material was either too convoluted, provided too much detail, or did not present the information in a manner conducive for an individual who is not a full-time meeting professional to learn. Consequently, it can be concluded that a new reference tool which extracts the basics from the current curriculum, compares and condenses the information and then presents the content in a quick reference guide would be a useful and relevant tool for utilization by administrative professionals.
PART THREE

Introduction

Part Three provides an analysis of the literature review conducted in Part Two from a content perspective. The conclusion of Part Three is a recommendation of which content should be implemented within a new reference guide to be utilized specifically for administrative professionals.

Results

All materials reviewed in Part Two have been formatted into a grid summarized below entitled *Content Comparison Chart* (see Figure 1.). The summary is based on the basic meeting management topics, as determined by the author, necessary for an administrative professional to know in order to effectively handle the job function of meeting planning.

A numerical rating scale was utilized to rate the topics within each guide. The focus of the rating scale is analyzing the amount of discussion of each topic within the literature. The rating scale and its assigned attributes are as follows, as it answers the question of *Did the literature reviewed address the following topic?*: (1) topic not referenced or discussed, (2) topic referenced but not discussed, (3) topic briefly referenced and discussed, (4) topic partially discussed, but information missing, and (5) topic was fully discussed.
<table>
<thead>
<tr>
<th>Genre</th>
<th>Publication and date published</th>
<th>Site Selection/ RFP's</th>
<th>Contracts/ Negotiations</th>
<th>Meeting Logistics</th>
<th>Food &amp; Beverage</th>
<th>Audiovisual</th>
<th>Travel/Ground Transportation</th>
<th>Budget/ Billing</th>
<th>Glossary/Key Terms</th>
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<tr>
<td>Administrative Professional</td>
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**Rating Scale**

1. Topic not referenced or discussed
2. Topic referenced but not discussed
3. Topic briefly referenced and discussed
4. Topic was partially discussed, information missing
5. Topic was fully discussed

Figure 1. Content comparison chart
In comparing the various literatures as divided into the genre categories, the literature contained in the *administrative professional specific* genre shows a vast difference in content inclusion and discussion. Boehme’s (1999) book *Planning Successful Meetings and Events* shows it provides the most complete discussion of the main topics in this genre, although some information is still missing. As reviewed in Part Two, however, both of these materials were found to be outdated. In addition, the chart shows that this genre, in comparison to the other two genres, does not provide as thorough reflection of the content.

Key commonalities can be found specifically in the *general knowledge* and the *meeting industry endorsed* genres. The *general knowledge* genre contained literature which overall provided a fairly thorough discussion of the content. Again, although some information was still missing, this sections’ literature did provide the basics. As reviewed in Part Two, this section was conceived to be easier to read than the literature sections of the *meeting industry endorsed*. However, it was still determined that these materials provided more information than was required to meet the basic needs and therefore could be seen as convoluted.

From the results shown in the *meeting industry endorsed* genre it is clear the majority of literature in this element provides a comprehensive and thorough discussion of the topic. Some material in this section was too narrow in viewpoint, for example *ASAE: Planning Small Meetings* (n.d.) and *Hyatt Hotels A to Z Guide* (2003). Thus, these works did not provide a universal discussion of the topics. The most comprehensive literature in this section (those receiving a complete rating of ‘5’ on all topics) was determined to be more advanced material and therefore, not the best source for
individuals with a limited industry knowledge base. In this genre there were two works, *APEX* (n.d) and *Conferon Guide* (n.d), which did provide a comprehensive job of discussion the topics without becoming confusing. As discussed in Part Two, these topics were also considered possibly the best templates for extraction and inclusion in the guide.

**Conclusions**

The content comparison chart shows the variance of content currently available on the subject of meeting planning. There is a large breadth of information within the genre, types of publications, as well as the individual topics covered. Reading and researching all of this information would be both time-consuming and potentially confusing for administrative professionals needing just the basics of meeting planning knowledge.

A more concise, easy to read guide should be compiled from the wealth of information already available. Extracting the basics in a format designed for individuals with limited industry knowledge base, will potentially make the process more efficient for them to incorporate meeting planning into their current job. In turn, this will help save the organization dollars by providing a skill-set that can help reduce meeting costs. By including additional references within the guide, administrative professionals looking to advance their knowledge will be able to do so at their leisure. In the end, the utilization of this guide will provide a better planner/supplier partnership for the administrative professionals working with meeting venues by offering key definitions of common industry terms as well as a basic overview of working with meeting venues.
Recommendations

It is recommended that the best literature utilized for the guide is literature which partially discusses the individual topics to the extent it is useful. However, it is important that the literature does not traverse into the advanced knowledge base arena which would require further time to study and research. The literature which is considered more advanced would be beneficial as inclusion in the guide from an additional resources standpoint. The individual looking to indulge their knowledge base further would then have relevant and industry endorsed information to research.

Due to APEX (n.d.) becoming the standardization of the meeting planning industry, the information and checklists contained in this literature would be beneficial to extract, compile and condense for the new guide. In the topic areas of APEX where the topic is briefly referenced and discussed, the Conferon Guide (2003) information would be an additional asset for inclusion.

The appendices included at the end of this paper, have been created by taking the current industry information available, as reviewed and discussed in this paper, and condensing it. It is recommended that these appendices be the basis of which the guide is created for administrative professionals to utilize. Currently the final version of this guide, once published, is being considered by Meeting Professionals International as one of their educational resource tools that they will promote to individuals interested in the industry of meeting management. In addition, the final version of this guide is being considered as the basis of workshop training program specifically geared toward administrative professionals.
Appendix A
Basics of RFPs/Site Selections


Overview: A Request for Proposal (RFP) is generally the starting place for finding a venue to host a meeting or conference. This is the opportunity to fully brief the potential venue on the meeting, attendees and specific needs. It is recommended that a detailed proposal be sent so that it can be most accurately aligned to fit your needs. Following is a recommended check-list that should be utilized in putting together the RFP.

Request for Proposal Check List:

Define General Event Requirements
- Goals and Objectives
- Number of Participants
- Location of Participants
- Event Rotation Schedule
- Preferred Activities
- Urban, Suburban or Resort Setting
- Pre- and Post-Event Functions
- Spouses and Families Attending
- Special Needs
- Affordable vs. Luxury Accommodations
- Event Budget

Define Specific Event Requirements
- Preferred Dates and Optional Dates (if available)
- Number and Type of Guest Rooms (including complimentary rooms and suites)
- Number, Size and Usage of Function Rooms
- Range of Acceptable Rates
- Dates and Types of Food & Beverage Functions
- Exhibits and Other Special Events or Activities
- Special Requirements

Include Event History
- Past Facility and Service Usage
- Past Promotional Assistance Provided by the Facility, CVB, Etc
  Past Guest Room Use (original block and actual usage)
Breakdown of Single, Double and Multiple Occupancies
- Number of No-Shows
- Number of Rooms Booked Outside the Room Block
- Food & Beverage Guarantees and Actual Consumption
- Function Space Used
- Audio/Visual (A/V) Requirements
- Registration Patterns
- Arrival and Departure Patterns
- Service Areas such as Registration, Ticket Sales, and Parking

Prioritize Negotiating Points
- Flexible Event Dates
- Function Room Set-ups
- Arrival and Departure Patterns
- Guest Room Rates
- Products or Services Provided

Prepare Short List of Prospective Sites
- Search Event Industry Web Sites
- Contact Prospects by Phone, Fax or Email
- Send Request Proposals in Writing (fax, email, mail or online RFP)
- Temporary Personnel
- Transportation
- Other Service Providers

Overview: Once the RFP’s have been returned and reviewed and the choices for venue location have been narrowed down, a Site Selection occurs. A site selection is when you determine, from the RFP’s, the best location at which to hold the meeting or conference. In many cases a site inspection occurs. A site inspection is when you physically meet at the venue with the all interested parties to review the property, the meeting space and meet with individuals you may be potentially working with. Following is a checklist recommended for the site selection/site inspection process.

Site Selection/Site Inspection Check-List

For room set-ups, work with a scaled diagram and consider
- Type of Activities, Purpose, Desired Atmosphere
- Expected Attendance
- Number, Dimensions of Tables
The Basics of Meeting Planning

- Type of Food Service
- Best Table Placement
- Decor, Entertainment

**Location and Dimensions**
- Stage
- Platform
- Dance Floor
- Proscenium Height
- Runways
- Ramps
- Risers
- Access Aisles
- Floor covering

**When Conducting Site Inspection(s)**
- Make Appointments with Sales Manager and/or CVB Representative
- Bring Notepad, Cassette or Video Recorder, Camera, Facility Brochures and Floor Plans
- Meet with Sales Manager, Operations Staff, Bureau Representative, Service Vendors, National Sales Representatives
- Ask Each Contact/Vendor About Checklist Points Pertaining to Their Areas
- Record Responses to Questions and Note Concerns to Discuss in Negotiations

**Inspect Possible Sites For**
- Sufficient Space
- Adequate Electrical Outlets, Voltage Capabilities
- Proper Acoustics, Lighting, Ventilation
- Columns, Other Obstructions
- Accessibility of Exits, Restrooms, Dressing Rooms, Telephones
- ADA/Accessibility Compliance

**Selecting Function Rooms**

**Study the Physical Aspects, Including**
- Attendee Comfort
- Environment that Matches Goals of Event
- A/V Feasibility
- Unobstructed Site Lines (columns, chandeliers, etc.)
- Speaker Focus
Accommodations for People with Disabilities
Traffic flow
Restroom Accessibility
External Noise
Food & Beverage Service (convenience)
Availability of Floor Plans with Dimensions

Focus on the Condition of the Rooms

Cleanliness
Furnishings
Ventilation
Lighting (on audience and on presenter)
Power Requirements
Acoustics
Accessibility
Obstructions
Soundproofing

Plan for Contingencies

Concurrent Groups
Change in Your Group's Size
Availability of Larger and Smaller Rooms (conditions, charges)
Facility Renovations
Weather Conditions (tent, canopies)
Feasibility of Temporary Structures

Do a Pre-Function Check of

Lighting and Lighting Controls
Ventilation
Facilities
Equipment
Services
Staff, Crews
Cleanliness
Adequate Signage
Fire Exits
Equipment Services, Policies Checklist

- Telephone Hook-Up
- Data Ports
- High-Speed Phone Lines
- Sign Posting Policy
- Staff Management Schedules
- Beepers, Walkie-Talkies
- Facility Personnel Responsibilities, Phone Extensions
- Availability of Temporary Secretarial Service

Site Selection Criteria for A/V

General questions

- Does the facility have a contract with a particular supplier?
- If so, what is the policy on outside vendors in the facility?
- What are the union jurisdictions?
- Are there charges for setup and move-out days?
- If a 24-hour hold is made on a room, is there an extra charge?
- Who locks and unlocks rooms? When? Is there full-time security?
- Is security in-house or contract? If contract, do you have the option to contract direct?
- Is there an engineer on staff, or is engineering contracted?
- When are rooms normally setup?
- Is there an accessible dock and elevator for contractors bringing in equipment and staging?
- How big are they? How do you schedule them for move-in and move-out?
- What is normally provided by the facility as part of the room? (microphones, house sound system, flipcharts, lecterns, etc.)

Room inspection

- What is the “true” ceiling clearance?
- What is the lowest ceiling point in the room?
- Are there obstructions? (low-hanging chandeliers, columns)
- What about any light sources or reflective surfaces? (windows, mirrors)?
- Is there a house phone in the room? Can it be disconnected?
- How soundproof are portable walls?
- What will be going on in adjacent rooms?
- Where are the entrances and exits? What can be blocked by A/V stands, stages or seating?
- Do doors squeak? Close completely? Automatically lock?
- What is the “true” meeting space?
The Basics of Meeting Planning

- Is there room for A/V setup and a control console?
- Does the room have a permanent stage? Stage lighting? Sound system?

**Sound system**
- Who handles the sound in the facility? Is there a patch fee?
- Is there a good quality sound system in the room? (Ask for a demonstration)
- Are portable sound systems available? (sound lecterns, etc.)
- Can the rooms be patched for audio recording from a central location?

**Lighting**
- Where are the house lighting controls? Can they be remote controlled?
- Can room lighting be divided into sections?
- Are “follow spotlights” available? At what cost?
- If stage lighting is to be hung from the ceiling, what are the restrictions? Where can it be hung? Who can do the work? Is there a reflected ceiling plan available?
- Are there man lifts, scissor lifts or basket lifts available from the facility? If so, at what cost? If not, from whom?

**Electrical**
- Where does the electrical service originate in the room?
- Who provides hook-up service?
- Do they also provide distribution of the service?
- What is the cost for hook-up and use?

**Communications and computers**
- What type of telephone, data and high-speed transmission service is available in the facility (Analog phone line, digital phone line, ISDN lines, T1 line, other)? At what cost?
- Are two-way radios available? Are there places where these do not function?
- Does the facility have a vendor for computer rentals? If so, compare to that of a contract vendor.
- Is there a Business Center capable of helping with computer presentations?

**Accessibility (for individuals with disabilities)**

**Access to the Function Room**
- Elevator to Function Room Level (not a service elevator)
- Ramp that Meets ADA Requirements

**Seating in a function Room**
- 36 to 42 inches (91 to 107 centimeters) of Table Space per Wheelchair
- 6-foot (1.8-meter) Wide Aisles, Minimum
- Contact Special-Needs Attendees about Seating Preferences
- Get Permission for Back-Row Placement
☐ Place Signer in Sight Line of Screen and/or Speaker
☐ Place Guide Dogs on an Aisle or in Place of Adjacent Chair

**Access to the Stage**

☐ Provide Ramp with Railing to the Stage at Least 1 Foot (.3 meters) Long for Every 3 Inches (7.5 centimeters) in Height
Appendix B
Basics of Contracts/Negotiations


Overview: Once the venue has been selected and you are ready to move into final negotiations and contracting with the venue. This process can take a long time and be an uncomfortable process, however, the following checklists have been designed to make this process smoother and easier for you.

Negotiations Checklists:

Negotiating Dates & Rates

Tips for Hotel Negotiations

☐ Provide Accurate Historical Data (arrival/departure pattern, room pick-up, no-shows, occupancy mix, food & beverage functions, rooms-to-space ration)
☐ Select 2-4 Properties for Negotiations
☐ Inform Properties of their Competition
☐ Learn Status of Market in Destination City
☐ Consider Seasonal Competition (high, low or shoulder season)
☐ Leverage Short Lead Time for Better Rates on Unsold Space
☐ Prioritize Negotiating Points
☐ Request Rate Quote for Your Group (standard, flat rate, range of rates)

Negotiable Items

☐ Room Rates
☐ Comp Rooms
☐ Suites and Upgrades
☐ Food & Beverage
☐ Function Space (rental rates, 24-hour holds)
☐ Attrition and Cancellation Policies
☐ In-Room Amenities
☐ In-House Services
☐ Cut-Off Date
☐ Discount for Early Payment of Master Account
☐ Round-trip Limo Service for VIPs
☐ Miscellaneous Concessions
Contracts Checklist:

Note: Obtain legal advice before signing any agreement

Identification of Group and Facility

☐ Names and Addresses of Organization and Facility
☐ Key Individuals
☐ Arrival and Departure Dates
☐ Early and Late Arrival Requirements
☐ Name and Type of Event

Clear Definition of Terms and Obligations

☐ Specificity of Terms of Contract
☐ Scope of Contract

Guest Room Reservations

☐ Number and Type of Guest Rooms
☐ Room Reservation and Confirmation Details
☐ Complimentary Room Policy
☐ Special room Requirements
☐ Rates for VIPs, Staff and Suppliers
☐ Cut-off Dates
☐ Guarantee and Deposit Requirements
☐ Check-In and Check-Out Times
☐ Specific Room Rates for Group
☐ Walking/Relocation Policy

Facilities for Events

☐ Room Rental and Setup Charges
☐ Convention Services and Equipment
☐ Union Jurisdiction and Arrangements
☐ Exclusive Services

Food & Beverage

☐ Number, Type and Attendance at Functions
☐ Confirmation Dates and Approximate Attendance
☐ Dates for Confirmation of Menus and Beverage Service
☐ Dates for Confirmation of Food and Beverage Costs
☐ Gratuities, Regulations, Taxes
### Exhibits

- Exhibit Booth Requirements
- Storage, Setup, Dismantling
- Security
- Operating Hours
- Services and Facilities
- Rules and Regulations

### Miscellaneous

- Transportation
- Parking
- Gratuities
- Recreational Fees
- Promotional Support

### Billing Procedures

- Method of Payment
- Time of Payment
- Format of Bills and Review Procedures
- Names of People Authorized to Sign Master Account
- Discount (if any) for Payment of Master Account Upon Check-Out
- Deposits (if any)

### Default and Breach of Contract

- What constitutes default or breach of contract?
- Extent of Liability in case of Breach or Default
- Liability of Defaulting or Breaching Party
- Clause Committing Party to Pay Attorney’s Fees if Litigation Arises
- Reciprocal Clause Committing Party to Pay Attorney’s Fees if Litigation Arises
- Terms for Terminating or Canceling Contract

### Indemnification

- Who is liable for injuries occurring under contract?
- Limit, if any, on Amount of Liability
- Notice, Choice of Counsel
Termination

- Who can terminate contract?
- When and under what circumstances contract can be terminated?

Cancellation

- Cancellation Terms in Contract
- Reason for Cancellation of Contract
- Time Limit for Cancellation of Contract
- Fees

Protection Clauses

- Fire Protection
- Cancellation
- Arbitration
- Insurance
- Change in Management
- Facility Remodeling
- Americans with Disabilities Act Compliance
- Alternative Dispute Resolution
- Financial Issues, Bankruptcy, Reorganization for Creditor Benefit

Insurance Coverage

- General Liability (Bodily Injury and Property Damage)
- Fire Legal Liability
- Broad Form Property Damage
- Medical Payment
- Incidental Medical Malpractice
- Certificate of Insurance from Contractors
- Independent Contractors’ Liability
- Products Liability
- Host Liability/Liquor Liability
- Additional Insured for Charter Transportation
- Valuable Records and Papers Insurance
- Office Contents Coverage
- Burglary and Robbery
- Worker’s Compensation
- Travel Accidental Death and Dismemberment
Appendix C  
Meeting Logistics/Room Set-ups

Sources for Appendix C: Carnegie Mellon (n.d.) Conference and Event Services Meeting Room Set-up and Styles retrieved online November 17, 2008 at http://www.cmu.edu/conferences/facilities/meeting/uc/room-styles.html


Overview: In arranging the logistics for the meeting it is imperative that you select the appropriate seating design appropriate for the meeting room. Generally the final outcome depends on the objective of the meeting. Following are some things to consider when planning meeting logistics and room set-ups.

Room Set-Up Options

Theater Style:

Definition – Chairs are lined up in rows facing the speaker. Rows can be straight, semi-circular or herringbone (angled toward the front of the room).

Best usage – Use when attendees are considered an audience (i.e., listening to speaker or watching a slide presentation).

Tips – Theater style is most efficient set-up and capitalizes on seating capacity. Not good for taking notes or if food is served.

Classroom Style:

Definition – Long, narrow tables are positioned in front of rows of chairs facing the speaker. Tables usually abut one another and water pitchers are placed on tables.

Best usage – Best used when presenter is expected to do most of the talking and the attendees must take notes, refer to material or work on computer equipment.

Tips – This is the most comfortable design for long sessions, but not preferred if discussion is encouraged amongst the attendees.
Banquet Style:

*Definition* – Attendees are seated at round tables – usually 60”, 66” or 72” in diameter.

*Best usage* – Choice for most meal functions and appropriate for small breakout or roundtable discussions involving group interaction and note taking.

*Tips* – This type of set-up requires a large amount of meeting space.

Crescent Style:

*Definition* - Attendees are seated at round tables — usually 60”, 66”, or 72” in diameter. A “crescent” is formed with 5-6 chairs which face the speaker – no chairs have their backs to the speaker.

*Best usage* - This design works well when you need to use a room for meals and for an educational session that immediately follows.

*Tips* - It’s also appropriate for general sessions where attendees break. Like banquet style, it uses a large amount of meeting space.

Conference Style:

*Definition* - Delegates are seated on all four sides of a table. For smaller groups (16 people or less), a single conference table is typically used. For larger groups, several tables are often combined to create a solid rectangular table.

*Best usage* - Setup is often used for board meetings, committee meetings, and other smaller functions at which interaction between participants is expected.
Tips - This design also can be used for high-level food and beverage functions with a small number of guests.

**U-Shape:**
*Definition* - Rectangular tables are positioned to form a “U.” Seating is usually on the outside of the U, but it’s possible to seat delegates on both inside legs of the U.
*Best usage* - The U-shape setup is often used for board of directors meetings, committee meetings, and breakout sessions involving audio-visual presentations because all attendees can see the AV when the screen is placed at the open end of the U.
*Tips* - Can be used for banquets, with seating on all sides of the U.

**Hollow Rectangle:**
*Definition* - 30" wide classroom tables are arranged in a square or other multi-sided design in which the center of the design is empty.
*Best usage* - Larger committee or board meetings of 17 to 30 people, at which interaction among attendees is important.
*Tips* - Avoid long straight sections of tables over 12 feet long. Octagons and hexagons work well to improve sight lines among attendees.

**Quick Calculation Tips for determining room size:**
To quickly figure out how large of a room you need for a setup, multiply the number of people by the appropriate square footage per person from the formulas below.
To determine if a certain meeting room can accommodate a desired setup, divide the room’s total square footage by the appropriate square footage per person from the formulas below.

**Theater Style**
- 12 square feet per person for groups of less than 60 people
- 11 square feet per person for groups of 60 to 300 people (the most common size breakout session)
- 10 square feet per person for groups of more than 300 people

**Classroom Style**
- 22 square feet per person for groups of less than 60 people
- 20 square feet per person for groups of 60 to 300 people (the most common size breakout session)
- 17 square feet per person for groups of more than 300 people

**Banquet Style**
- 13.5 square feet per person

**Conference Style or Hollow Square**
- 30 square feet per person

**U-Shape**
- 35 square feet per person

Note: The smaller the room or more square the room is, the greater the square footage needs per person. In a smaller or square room, there is more wasted space per person in the front, back, and sides of the room.
Appendix D
Basics of Food & Beverage


Overview: Food and beverage planning has many variables and options involved. From determining what to serve, to how much, to working with budget; food and beverage planning is an area which will take some focus. Following are checklists to utilize when planning the food and beverage for the meeting or conference.

**Food and Beverage Checklist:**

**Records of Previous Functions**
- □ Projected Versus Actual Attendance
- □ Number, Type of Functions
- □ Menus, Including Special Dietary or Religious Restrictions
- □ Number, Type of Drinks Served per Person at Meals
- □ Number, Type of Drinks Served per Person at Receptions
- □ Projected Versus Actual Budgets
- □ Guarantee, Deposit Figures
- □ Size and Setups of Rooms
- □ Gratuities Policy
- □ Room Service Patterns
- □ Hotel Outlet Usage

**Schedule for Each Function**
- □ Is function primarily business, social, hospitality?
- □ Are musicians, entertainers, emcee, ushers needed?
- □ Will timing conflict or overlap with other events at the facility?
- □ Is time allowed for movement of attendees?
- □ What is the expected attendance at each function?
- □ Who will handle which responsibilities?

**Establish a Working Budget**
- □ Room Rental Fees
- □ Food and Beverage Costs
- □ Services/Labor Costs
- □ Gratuities/Service Charges
The Basics of Meeting Planning

- Extra Tips
- Entertainment Fees
- Union Requirements
- Maintenance
- Taxes
- Special Equipment
- Souvenirs, Awards, Gifts
- Decorations

Inquire About Local Laws and Regulations
- Union Regulations on Minimum Number of Waiters, Musicians, Bartenders
- Overtime
- Facility Setup Staff
- Liquor Laws
- Facility Policies on Outside Liquor Supplies
- Lounge, Room-Service Hours and Regulations
- Fire Codes

Inquire About Special Services
- Elevators/Escalators
- Checkrooms
- Transportation
- Traffic Control
- Garage, Valet Parking Service
- Telephone, Message Service
- Security

Contract for any Additional Services
- Audio/Visual
- Photographer, Videographer
- Entertainment
- Lighting
- Florists
- Security Guards
- Decorator-Designer
- Transportation
- Media Coverage
Negotiating Cost

- When negotiating food costs more than six months out, agree on a percentage to pay above present prices.
- Decide how you want to be charged: signed guarantee, number of meal tickets collected, quantities consumed.
- Set Cut-Off Date
- Determine percentage above guarantees facility will supply, and incremental price, if any, for latecomers.
- Negotiate Beverages Prices
  - Determine minimum number of servers and bartenders for each function, and charges for them.
- Clarify the Basis for Federal, State and Local Tax Charges
- Inquire About Any Other Surcharges: Ice, Corkage, Setups, Minimum Labor Fees for Small Groups
- Plan Menus Accordingly
- Specify All Agreements in Contract
Appendix E
Basics of Audiovisual


Overview: The purpose of the meeting or conference is to communicate a message/objective. That cannot be done without utilizing audiovisual. Audiovisual selection and correct usage is imperative to the communication being clear and concise. Since many individuals are not audiovisual experts, the following checklists have been created for assistance in finalizing your audiovisual needs. (For purposes of this appendix, audiovisual also includes computer and technical equipment that may be required.)

Audiovisual Checklist:
Note: Work closely with the in-house audiovisual technician to discuss your needs and objectives of the meeting.

A/V Requirements for Speaker Presentations

Microphones

☐ Does speaker prefer handheld or lavalier (lapel) microphone?
☐ Does speaker prefer wireless or wired microphone?
☐ Is a mixer required? If so, how many?
☐ One wired podium mic (handheld) or wired lavalier mic does not require a mixer.
☐ More than one mic of any kind usually requires a mixer.
☐ Standard mixers have 4 channels and can handle 4 microphones. If a speaker wants 5 to 8 microphones, two standard mixers or one 8-channel mixer will be required.
☐ Is a sound technician needed?
☐ For 1 to 4 mics, a sound technician is not normally required.
☐ For more than 4 mics, a sound technician is always required.
☐ Is speaker providing mic? Patch fee may apply.
☐ Will other input devices be used (videotape players, audio cassette players, etc.)? If so, how many? Will additional mixers be required?

LCD Projectors

☐ What is the lamination of the LCD Projector?
☐ What size screen is preferred? Plan on largest screen applicable for the room.
☐ Is standard tripod screen or fast-fold screen preferred? For fast-fold, is dress kit (skirt) or pipe and drape required?
☐ Will the presentation be front or rear projection? Rear projection requires fast-fold screen with dress kit or pipe and drape.
☐ Is wireless remote control needed? (allows free movement)
Will the speaker show more than provide their own computer for connection or will a computer need to be provided? Will the presentation be pre-loaded or will the presenter bring it on a memory stick?

Who will operate the lights? Is a technician needed?

**Videocassette recorders (VCRs)**

- What size and format (VHS, VHS-C, Super VHS, U-format, Hi 8, Betacam, Betacam SP)?
- If presenter is from outside the United States, what is the video standard (NTSC, PAL, SECAM)?

**Computer interface**

- What make and model computer will be used?
- What is the monitor scan rate (VGA, SVGA, XGA or higher)?
- How many computers? Provided or rented? Are power cables, phone cable extensions, etc. included?
- Does the speaker need an Internet connection? If so, What speed (modem, ISDN, T-1)?
- If using a laptop, is power supply or adapter needed?
- Is an LCD projector needed?

**Cassette decks**

- Is it for playback only or for recording purposes? Playback to large audiences requires a 4-channel mixer to patch into sound system.

**General A/V Requirements**

- Have equipment set one hour prior to meeting time.
- If the speaker wants equipment setup the night before a meeting (for rehearsal purposes, etc.) a one-day rental fee may be applied for that night.
- If technical specialists are required, allow for 4-hour minimum and overtime rate after 5 p.m. and on weekends.
- Communicate A/V requirements to A/V contractor as soon as possible. Some equipment may need to be special ordered.
Appendix F
Basics of Travel/Ground Transportation


Overview: Ensuring your attendees arrive at the meeting destination on time is important to the success of the program. Following are several check-lists that involve potential transportation options as well as additional items to consider in regard to transportation.

Transportation Checklist:

**Air Transportation**

*Choose*
- ☐ Travel Agency
- ☐ Airline(s)
- ☐ Official Carrier(s)

*Provide the Airline with*
- ☐ Event Dates (Arrival/Departure, Destinations)
- ☐ Attendee Demographic Information
- ☐ Estimated Attendance
- ☐ Travel History
- ☐ Hotels
- ☐ Visibility in Event Promotional Materials

**Coordination Tools from Airline**
- ☐ Arrival and Departure Manifest
- ☐ Rental car Usage Report
- ☐ Hotel Manifest of Attendees

**Airline Services**
- ☐ Discounts
- ☐ Staff Travel
- ☐ Air Cargo
- ☐ Arrival/Departure Information
- ☐ Cost Analysis
- ☐ Promotional Assistance
- ☐ Advertising
- ☐ Convention Reservation Desk
- ☐ Discounts
Ground Transportation

Choose a DMC or Transportation Company Based On

- Costs (Including Willingness to Negotiate)
- Reputation (Service Performance Record, Number of Years in Business)
- Number of Full-Time Staff
- References (Event Planners, Vendors)
- Number, Size, Condition and Availability of Vehicles
- Responsiveness to Planners’ Calls and Requests
- Insurance Coverage
- Special Services

Ask the DMC or Transportation Company

- Does the company own and operate its own equipment or will it be subcontracting?
- What are the minimum rental periods for vehicles?
- If a program runs longer than expected, will buses still be available? What is the additional cost per hour, plus staff?
- How are buses dispatched? Is there a dispatcher on site?
- Can the vehicles accommodate people with disabilities? If not, what other options are available?
- What is the condition of the buses that will be used? Are the microphones working?
- Are back-up vehicles available in case of breakdown or overflow?
- Are the drivers equipped with radios?
- Are buses air-conditioned?
- How far from your pick-up point are vehicles located? If necessary, can buses be parked legally at pick-up and drop-off points?
- What hours will buses be in use?
- What route will the buses follow?
- Are there alternative routes for busy times or emergencies?
- What are the normal traffic and road conditions on all scheduled (and alternate) routes during operating hours?
- Request a Certificate of Insurance
- Guarantee your equipment will remain on-site during the program.
- Are the drivers local?
- Request copies of trip sheets from DMC or transportation company

Charter or Shuttle Buses

- Pick-Up Points and Drop-Off Points
- Best Route and Schedule
- Hours of Operation
Where Information Should be Posted/Published

Signage

For VIPs

Arrival and Departure Information
Availability of Airport VIP Lounge
Customs and Immigration
Appropriate Airport Location to Meet VIPs
Gate Greetings
Parking for Incoming Flights
Drop-off Points for Departing VIPs
Route and Travel Times to and From the Airport
Signage to Identify Arriving Passengers
Baggage and Gratuities
Appendix G
Basics of Billing/Budgeting


Overview: Most meetings and conferences have budgetary restrictions. Therefore, budgeting for a meeting or conference should be done at the beginning of the planning process and updated throughout as details are finalized. At the end of the meeting or conference it important that the billing be handled efficiently and accurately to ensure budget goals are met. Following are some checklists which involved budgeting and billing for consideration in the planning of the meeting.

Budget Checklist:

Income Items
- Registration Fees
- Guest Tour Fees
- Sporting Event Fees (Golf Outings, Other)
- Tickets (Banquet, Dinner, Other)
- Exhibit Booth Sales
- Sponsorships
- Advertisement Sales
- Proceedings (Tapes, etc.)
- Interest earned

Expense Items
- Staffing Costs (Salaries, Benefits, Travel, Housing, Meals, Phone)
- Overhead (Rent, Office Supplies, Equipment)
- Legal Fees
- Insurance
- Site Selection Costs
- Space/Facility Rental
- Audio/Visual Services
- Speakers (Honoraria, Travel, Meals, Other)
- Food and beverage
- Program Committee (Volunteer) Costs
- Temporary Staffing
- Gratuities
The Basics of Meeting Planning

- Design and Production of Print Material
- Printing, Photocopying
- Advertising Costs
- Shipping
- Equipment Rental (Computers, Copiers)
- Phone
- Bank Charges (Processing Credit Cards)
- Postage
- Registration Booths
- Production
- Photography
- Press Costs (Press Room, Press Conference)
- Decoration
- Signs
- Exhibit Expenses
- Awards
- Flowers
- Special Events
- Gifts, Amenities
- Guest Tours
- Sporting Events (Golf Outings, Other)
- Transportation
- Miscellaneous

**Billing Checklist:**

**Determine Which Method of Accounting is Used by Your Organization**
- Cash Accounting
- Accrual Accounting

**Establish a Projected Cash Flow Timeline**
- Items That Must be Paid Prior to the Event
- Items That Must be Paid During the Event
- Items That May be Paid After the Event (Include Date)

**Review Your Accounting Needs with the Venue**
- Establish Direct Billing if Desired
Identify and Communicate Your Master Account Needs
Request Sub-Master Accounts if Necessary (Catering, Audio/Visual, Business Center, etc.)

Prepare a Checklist for the Venue
- Complete No Less Than 30 Days Out
- Provide Specific Billing Instructions
- List People Authorized to Sign to the Master Account

Review Event Orders and Related Materials from the Venue
- Confirm Details as Outlined in Your Checklist
- Confirm Pricing of All Events
- Prepare your Anticipated (Expected) Counts in Order to Give Catering Guarantees
- Re-Confirm All Billing Requirements Upon Arrival for Your Event
- Review Who is Authorized to Sign for Master Account Expense Items
- Be Prepared to Give Food and Beverage Guarantees
- Confirm All Arrangement That Have Been Set Up with Outside Vendors on Your Behalf
- Schedule Master Account Reviews Throughout Your Stay

Scrutinize the Master Account Prior to Departure
- Identify all charges that you are responsible for on your master account.
- Dispute any charges that have not been authorized.
- Confirm your acceptance of any paid-outs that have been made for goods and services on your behalf.
- Establish dates for payment of undisputed charges and for resolution of disputed charges.

When You Receive the Complete Master Account Bill
- Acknowledge the receipt of the master account in writing, enclosing a payment or indicating a payment date.
- Identify disputed charges and reconfirm a resolution date.
- Complete master account payment within the prescribed time-frame to avoid any late-payment charges.
Appendix H
Glossary of Key Terms
Source for Appendix H: Meeting Professionals International (2006). Meetings and
Conventions: A Planning Guide with 2006 Updated Forms – CD-Rom. Dallas, TX: MPI
Foundation.

Overview: Following is a listing of key terms and definitions utilized within the meeting
management industry.

GLOSSARY

accessibility availability or approachability for all persons, regardless of a person’s physical or mental
limitations

accommodation guest bedrooms occupied by meeting attendees

accompanying any individual who comes with a participant, not necessarily involved with the meeting
person sessions; guest or spouse of an attendee

Accrual accounting income is entered when it is earned and expenses are entered when they are incurred, not
necessarily when they are paid

Agenda program of things to be done; specifically, a list of things to be dealt with at a meeting

ambient lighting level of illumination from natural lighting sources already existing in an environment

Amenities complimentary items; often in the guest’s bedroom

ancillary those events that are in conjunction with the conference/event, such as guest programs

attendee individual registered for a conference; people who actually come are verified attendees

attendee profile a description of the typical delegate which includes such details as age, sex, point of origin,
companions (demographics)

attrition clause a specific provision in a contract that has been agreed upon in writing by the hotel and the
meeting sponsor; provides for payment of damages by the sponsor to the hotel when the
sponsor fails to fulfil its specified percentage of contracted room nights or its specified
percentage of food and beverage or both

audio visual aids audio and visual support for meetings, usually taking the form of film, slides, overhead
projection, flip charts, sound and video equipment

banquet event order (BEO) detailed instructions for a particular event prepared by the facility; also known as a résumé
sheet or function sheet; includes detailed instructions related to room setups, food and
beverage
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
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<tbody>
<tr>
<td>barrier free</td>
<td>absence of obstacles preventing persons with special needs from moving freely to all public areas within a building</td>
</tr>
<tr>
<td>brainstorming</td>
<td>group sessions in which all participants contribute creative ideas which are not initially judged for merit</td>
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<tr>
<td>breakeven point</td>
<td>the point at which revenues match expenditures (e.g., no financial loss is incurred)</td>
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<tr>
<td>breakout session</td>
<td>small group sessions, panels, workshops or presentations, offered concurrently within the meeting, but within the meeting format, formed to focus on specific subjects; these sessions can be arranged by basic, intermediate or advanced; or divided by interest areas or industry segment</td>
</tr>
<tr>
<td>bulk mailings</td>
<td>large quantity of mail sent at one time at a special rate</td>
</tr>
<tr>
<td>budget reconciliation</td>
<td>a comparison of the budgeted figures for the meeting vs the actual figures achieved</td>
</tr>
<tr>
<td>cancellation clause</td>
<td>1) provision in a contract which outlines penalties for both parties if cancellation occurs for failure to comply with terms of the agreement; 2) (entertainment) provision with artist’s contract that allows artist to cancel within a specified period of time prior to artist’s play date</td>
</tr>
<tr>
<td>cash accounting</td>
<td>a system in which revenue and expenses are counted as they are actually received</td>
</tr>
<tr>
<td>cash bar</td>
<td>private room bar set up where guests pay for drinks individually</td>
</tr>
<tr>
<td>cash flow</td>
<td>the transfer of monies into and out of an enterprise</td>
</tr>
<tr>
<td>Certified Meeting Manager (CMM)</td>
<td>Certification program offered by Meeting Professionals International; global certification in meeting management that focuses on strategic thinking and actions for senior level meeting professionals</td>
</tr>
<tr>
<td>Certified Meeting Professional (CMP)</td>
<td>accredited designation offered by the Convention Industry Council; this designation certifies competency in 27 areas of meeting management through application and examination</td>
</tr>
<tr>
<td>complimentary (comp)</td>
<td>service, space or item given at no charge</td>
</tr>
<tr>
<td>complete meeting package (CMP)</td>
<td>an all-inclusive plan offered by conference centers; includes lodging, all meals and support services</td>
</tr>
</tbody>
</table>
concurrent session  multiple sessions scheduled at the same time; programs on different themes or subjects offered simultaneously

conference  1) participatory meeting designed for discussion, fact-finding, problem solving and consultation; 2) an event used by any organization to meet and exchange views, convey a message, open a debate or give publicity to some area of opinion on a specific issue; no tradition, continuity or periodicity is required to convene a conference; although not generally limited in time, conferences are usually of short duration with specific objectives; conferences are generally on a smaller scale than congresses

conference résumé  a detailed summary of overall meeting requirements prepared by the organizers for the facilities and/or suppliers. Also called event résumé, manual of operations

contingency plan  an alternative plan that may replace the original plan when circumstances change

continuing education units (CEUs)  requirement of many professional groups by which members must certify participation in formal educational programs designed to maintain their level of ability beyond their original certification date

contractor  an individual or organization providing services to an exposition and/or its exhibitors; typically refers to either a general service contractor or specialty contractor

convention  large, national meetings of business circles, whether for discussion or commercial exhibitions or both; may also refer to a general and formal meeting of a legislative body, social, or economic group in order to provide information on a particular situation and in order to deliberate and, consequently, establish consent on policies among the participants

convention and visitors bureau (CVB)  not-for-profit destination marketing organization that represents and promotes a city or geographic area in the solicitation and servicing of all types of travelers to that city or area, whether they visit for business, pleasure or both; CVBs provide destination promotion and sometimes offers personnel, housing control, and other services for meetings and conventions.

cover  the number of people served at a food and beverage event, the table setting for one person, or in reference to the number of waiters per cover or person

crescent-round setup  uses 60-, 66- or 72-inch (152-, 168- and 183-centimeter) diameter rounds with seating on two thirds to three quarters of the table and no seating with its back to the speaker; used for banquet-to-meeting or meeting-to-banquet quick set; also called buzz style setup or half-moon seating

crisis management  immediate action to control or direct any situations which become problematic and which would have a major impact on the meeting
crowd control   direction provided to attendees to ensure smooth traffic flow

cut-off date   designated date when the facility will release a block of sleeping rooms to the general public; the date is typically three to four weeks before the convention; also called the reservation review date

data projector   the projection of a computer signal from a personal computer, laptop or other computer device onto a screen from a LCD or equivalent projector for viewing by audience

delegate   1) registered meeting participant; 2) voting representative at a meeting

delegate profile   a description of the typical delegate which includes such details as age, sex, hometown, companions

demographics   characteristics that help create a profile of exhibitors and attendees; may include company location, job function, purchase budget, purchase intentions.

destination   a city, area or country which can be marketed to groups or individuals as a place to visit or hold a meeting

destination management company (DMC)   company or professional individual engaged in organizing tours, meetings of all types and their related activities; same as professional congress organizer (PCO).

educational credit   acknowledgement of participation in continuing education as recognized by an accredited authority (CEU)

emergency action plan   procedures for response to any number of emergency situations, such as medical emergencies, fire and bomb threats

entertainment   activity performed for the amusement and enjoyment of others

ethics   the science of morals; moral principles or practices of a person, company, or association

evaluation   1) critiquing and rating the overall success of a meeting; 2) developing a meeting profile from accurate meeting statistics.

event   (a) portion(s) of a meeting (e.g., food function, festival)

event resumé   a collection of all details relative to a meeting’s needs; this document is circulated to all key personnel in the facility and organization

facility   a structure that is built, installed or established to serve a particular purpose
feedback 1) regeneration of sound from audio speakers back through a microphone causing a squealing sound; 2) response about an activity, policy, or idea.

fixed cost the day-to-day cost of doing business that is pre-committed, such as salaries, insurance, lease expenses, utilities, etc.

fixed expense expense incurred regardless of the number of meeting attendees

flip chart large pad of paper placed on an easel and used by a speaker for illustrative purposes

floor plan a schematic reproduction of the layout for a specific room including placement of every item (e.g., placement of chairs, tables, furniture, plants, entrance doorways, AV, etc.)

follow-up activities and communications which take place after a meeting; to be distinguished from "evaluation," which is a measurement of the achievement of defined objectives

follow spotlight manually movable spotlight (a brilliant light projected onto a particular area)

force majeure contract clause which limits liability should the event or performance be prevented due to Acts of God, Acts of War, civil disturbances, labor strikes or other disruptive circumstances beyond an artist’s or a facility’s control; (Usually inclement weather does not apply.)

front screen projection of an image onto the front surface of a light reflecting screen from a projector placed within or behind the audience

function sheet detailed instructions relevant to a particular event; also known as banquet event order (a BEO) or résumé sheet

function space space in facility where private functions or events can be held

general session a meeting open to all those in attendance at a convention; also called a plenary session

graphics communicative elements such as color, copy, art, photographs, translites, etc. used to illustrate a booth theme, conference marketing materials or to enhance décor

gratuity mandatory charge added to food and beverage prices; usually ranging from 15 to 22 percent of food and beverage prices; ostensibly to go to service personnel, some properties take a percentage for administrative costs, confusing it with a service charge

green meeting a meeting in which methods are used to create an environmentally-sensitive meeting (e.g., use of Internet instead of paper, use of china instead of paper plates, donation of surplus food to a food bank, use of recycling, etc.)

guarantee the minimum number of servings to be paid for by the client, whether not consumed they are
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>guest</td>
<td>individual invited to attend or participate in a meeting at no charge; may also refer to an accompanying person who may pay a fee</td>
</tr>
<tr>
<td>guest room pick up</td>
<td>actual number of guest bedrooms used</td>
</tr>
<tr>
<td>herringbone setup</td>
<td>rows of chairs or tables slanted in a V-shape facing a head table, stage or speaker; sometimes referred to as chevron; same as V-shape setup</td>
</tr>
<tr>
<td>hidden costs</td>
<td>unexpected charges that need to be anticipated (e.g., gratuities)</td>
</tr>
<tr>
<td>hold-harmless clause</td>
<td>part of a contract declaring that neither party will hold the other responsible for any damages or theft to materials or equipment owned or rented by either party; clause declaring that one party will take responsibility for damages assessed as the result of another party’s inaction</td>
</tr>
<tr>
<td>hollow square setup</td>
<td>tables set in a square (or rectangle) with chairs placed around the outside of the table; center (inside) tables are hollow</td>
</tr>
<tr>
<td>honorarium</td>
<td>voluntary payment made for services where no fee is legally required</td>
</tr>
<tr>
<td>host organization</td>
<td>an association, corporate body, town, country or other such party that invites an event to take place within or under its jurisdiction or its financial responsibility.</td>
</tr>
<tr>
<td>host bar</td>
<td>guests do not pay for drinks, often sponsored; also called an open bar or sponsored bar</td>
</tr>
<tr>
<td>housing bureau</td>
<td>reservation office, often within a convention bureau, which coordinates housing for groups</td>
</tr>
<tr>
<td>indirect cost</td>
<td>also called overhead or administrative costs, these are expenses not directly related to the meeting; they can include salaries, rent, and building and equipment maintenance</td>
</tr>
<tr>
<td>incentive</td>
<td>reward offered to stimulate greater effort</td>
</tr>
<tr>
<td>indemnification</td>
<td>a clause appearing in most contracts stating that one party agrees to hold the other harmless (not liable) in spite of what happens and whose fault it is; provides basis for compensation for incurred hurt, loss or damage</td>
</tr>
<tr>
<td>in-kind</td>
<td>contributions of goods and services without monetary exchange</td>
</tr>
<tr>
<td>international delegate</td>
<td>a registered participant who resides outside the host nation</td>
</tr>
<tr>
<td>international meeting</td>
<td>1) international/intercontinental: a meeting of an organization with multi-national membership that is available to meet on more than one continent; 2)</td>
</tr>
</tbody>
</table>
international/continental: a meeting of an organization with multi-national membership that is available to meet on only one continent; 3) international/regional: a meeting of an organization with multi-national membership that is available to meet in only a given region of one continent

itinerary detailed schedule of a visit or tour

keynote speaker speaker whose presentation establishes the theme or tone of the meeting

lanyard a cord or string worn around the neck, and attached to a badge

lavalier microphone portable microphone that hooks around neck or is clipped to clothing; also known as a necklace, lapel, or pendant microphone

lecture discourse given before an audience, especially for instructional purposes

letter of agreement document outlining proposed services, space, or products which becomes binding upon written approval by both parties; lists services, foods, beverages, and so forth

liability legal responsibility for damage or injuries to make good a loss or claim

liquidated damages part of a contract dealing with procedures, penalties, and rights of the party causing damages; settling of the damages dispute

logistics tasks undertaken to ensure the efficient and effective management of materials, information and people for the implementation of the meeting

master account all items that are charged to a group; may include room, tax, incidentals, food and beverage, audio visual equipment, décor, etc.; same as master bill

meeting a gathering for business, educational, or social purposes; associations often use the term to refer to a combination of educational sessions and exhibits. Includes seminars, forums, symposiums, conferences, workshops, clinics, etc.

meeting agenda a list, outline, or plan of items to be done or considered at a meeting or during a specific time block

meeting history record of an organization’s previous meetings; usually includes information pertaining to original room block, actual room pickup, meeting space required, and food and beverage revenues generated

meeting specifications information about a meeting (e.g., hotel occupancy patterns, function space, food and beverage requirements) that is sent directly to a venue or circulated by the convention and visitors bureau
meeting theme the central motif around which the meeting and elements of the meeting are designed
message center the location where participants can pick up messages
mixture audio unit by which sound signals from all sources feed into one system; allows for
dissimilar inputs (microphone and line) to be combined and controlled into one output
objective formalized statements of outcomes to be anticipated as a result of a meeting
onsite at the site of the meeting/program component
onsite registration process of signing up for an event on the day of, or at the site of, the event
onsite office a working office located at the site of the meeting
operations manual the step-by-step procedures developed for the use of staff to conduct the meeting; also
known as conference manual, procedural guide, meeting resource guide book, conference résumé
operations sheet detailed instructions for a particular event prepared by the facility; also known as a banquet
order, event order, resumé sheet or function sheet
overhead projector equipment which projects an image on a screen by passing light through a transparent slide
or other transparency
overset number of covers set over the guarantee; paid for by the client only if actually consumed
paperless conference providing all documentation in other media besides print (including marketing, registration,
speaker materials); can be on a website, Internet, disk or in CD ROM format
physical requirements the architectural design, furnishings, temperature, and other such factors that are necessary to
meet the needs of a meeting
plasma screen flat screen that has a clear image even in ambient lighting
post conference a meeting between a meeting manager and facility staff to discuss and evaluate an event as
meeting(s) soon as it is over; may involve a final review of the master account
post conference report a report provided by the meeting facility to the meeting professional accounting for the
meeting’s actual sleeping room pick-up, food and beverage functions, function-room
breakdown, exhibit information (if appropriate) and activities; a meeting’s history can be
compiled from this document
poster session 1) display of reports and papers, usually scientific, accompanied by authors or
researchers; 2) a session dedicated to the discussion of the posters shown inside the meeting area; when this discussion is not held in a special session, it can take place directly between the person presenting the poster and interested delegate(s)

power drop describes the location where power is required for any equipment that is necessary during the course of an event; commonly used for lighting rigs, audio rigs and audio visual equipment

pre conference meeting briefing(s) with meeting professional, facility and/or suppliers to review the purpose and details of the meeting

pre and post program(s) organized outings taking place before (pre) or after (post) the working conference for both delegates and accompanying persons.

pre registration the process of registering prior to the event; to be distinguished from "onsite" registration which takes place at the site of the event

presenter person explaining a given topic in an informational session

printing and electronic distribution two methods of distributing information to stakeholders (via traditional hard copy or electronically)

proceedings published volume transcribing the conference sessions in full; may or may not include details of discussions

program schedule of events giving details of times, places and speakers

property establishment such as a hotel, motel, inn, resort, conference centre, or meeting facility

reader board board or electronic screen listing the day’s events at a venue or facility

ready room area set aside for speakers to meet, relax, test AV, or prepare prior to or between speeches

rear screen projection image projected on the back surface of a screen which is placed between the viewer and the projector

registration 1) process by which an individual indicates his intent to attend a conference or stay at a property; 2) method of booking and payment; 3) process of recording data about an attendee (or exhibitor), sending a confirmation and creating a badge used onsite

registration packet (kit) (materials) packet of meeting materials such as program book, tickets, maps, etc. handed out at the registration desk

request for a document that stipulates what services the organization wants from an outside contractor
proposal (RFP) and requests a bid to perform such services

résumé  a collection of all details for a single meeting needs; will include sleeping room information, billing arrangements and meeting requirements including food, beverage and audio visual; distributed to all hotel departments and usually shared with the meeting organizer

rider  expenses and requirements related to entertainment or entertainers over and above their contract fee; includes travel, food and beverage, staging requirements, etc.

risk management  recognizing the possibility of injury, damage or loss, and having a means to prevent it or provide insurance

riser  platforms of various heights (30.5-45.5 cm [12-18"], 45.5-61 cm [18-24"] or 61-91.5 cm [24-36"]) used to elevate the speaker or headtable so they can be seen throughout the room

room block  the number of guest bedrooms reserved for a specified length of time for those who will be attending an event

rooming list  roster of individuals requiring guest bedroom accommodations, including type of accommodation and arrival and departure dates and payment methods

room monitor  the person who ensures that the meeting is proceeding according to plan

room rate  fee charged for guest bedrooms

rounds  banquet table, usually 60 inches (152 centimetres) in diameter; also available in 66- and 72-inch (168- and 183 centimetre) diameters, that seat 8 to 10 people

seminar  1) lecture and dialogue allowing participants to share experiences in a particular field under the guidance of an expert discussion leader. 2) meeting or series of meetings of from 10 to 50 specialists who have different specific skills but have a specific common interest and come together for training or learning purposes; the work schedule of a seminar has the specific object of enriching the skills of the participants

service levels  ratio of servers to banquet guests (e.g. 1:20 or 1:24)

signage  a visual means of communicating either direction, information or instruction

signing authority  person who has authority to sign documents, thereby authorizing charges, guaranteed payment, contracting space, services, and supplies

site  1) area, location, property or specific facility to be used for meeting; 2) a particular platform or location for loading or unloading at a place; see Venue

site inspection  personal, careful investigation of a property, facility, or area
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>site selection</td>
<td>the process of choosing a location for a meeting</td>
</tr>
<tr>
<td>slippage</td>
<td>the percentage of guest bedrooms that do not materialize from the negotiated room nights</td>
</tr>
<tr>
<td>special needs</td>
<td>those persons whose needs require special attention</td>
</tr>
<tr>
<td>staging</td>
<td>1) design and placement of all elements being used for a meeting or event; 2) the implementation of a meeting or event</td>
</tr>
<tr>
<td>supplier</td>
<td>a person, company, facility, agency or other entity who sells space, goods or services for meetings</td>
</tr>
<tr>
<td>symposium</td>
<td>meeting of a number of experts in a particular field at which papers are presented by specialists on particular subjects and discussed with a view to making recommendations concerning the problems under discussion</td>
</tr>
<tr>
<td>T-shape setup</td>
<td>series of tables set up in the shape of the block T with chairs set all around except at head table.</td>
</tr>
<tr>
<td>teleconference</td>
<td>type of meeting which brings together people in two or more locations through telecommunications; may involve audio with or without graphics, or full motion video</td>
</tr>
<tr>
<td>TelePrompTer®</td>
<td>electronic device which allows display of script for speaker to read during presentation</td>
</tr>
<tr>
<td>theme event</td>
<td>an event designed so that food, decorations and entertainment all relate to one central motif</td>
</tr>
<tr>
<td>traffic flow</td>
<td>the movement of persons and vehicles inside and outside a meeting; planning takes into account volume and direction</td>
</tr>
<tr>
<td>transportation coordinator</td>
<td>a person in charge of planning and managing transportation arrangements for participants</td>
</tr>
<tr>
<td>turnover</td>
<td>1) breaking down and resetting a room with a different setup; 2) a pastry that usually has a fruit filling</td>
</tr>
<tr>
<td>variable cost</td>
<td>an expense item that changes according to the number of attendees present at a meeting</td>
</tr>
<tr>
<td>venue</td>
<td>1) site or destination of meeting, event or show; 2) location of performance such as hall, ballroom, auditorium, etc.</td>
</tr>
<tr>
<td>very important person (VIP)</td>
<td>those designated for special treatment; may include speakers, visiting dignitaries, officials, sponsors</td>
</tr>
<tr>
<td>VIP host</td>
<td>meeting professional, host organization member, or local CVB member assigned to greet</td>
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</tbody>
</table>
VIP participants and/or their staff on arrival, and act as liaison

<table>
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<tr>
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<tr>
<td>video cassette recorder (VCR)</td>
<td>playback and recording</td>
</tr>
<tr>
<td>video conferencing</td>
<td>a meeting between two or more people or groups across a distance, including video, audio, and potentially other data, utilizing telecommunications or communications satellites for transmission of the signal</td>
</tr>
<tr>
<td>virtual conference</td>
<td>any meeting where people at two or more distant locations are linked using video, audio and data for two-way communication via satellite communications or the Internet; each party sees and hears the other through TV screen or computer monitor and audio speakers</td>
</tr>
<tr>
<td>volunteer</td>
<td>a person who provides time and/or expertise to a meeting, event or conference with no expectation of compensation</td>
</tr>
<tr>
<td>walk policy</td>
<td>guest holding confirmed sleeping room reservation sent to another hotel because of overbooking.</td>
</tr>
<tr>
<td>webcasting</td>
<td>an event that broadcasts the audio and/or video portion of a keynote presentation or other educational sessions over the Web in real-time or on-demand.</td>
</tr>
<tr>
<td>white board</td>
<td>used like a chalkboard but utilizes dry erase markers instead of chalk</td>
</tr>
<tr>
<td>workshop</td>
<td>1) meeting of several persons for intensive discussion; the workshop concept has been developed to compensate for diverging views in a particular discipline or on a particular subject; 2) informal and public session of free discussion organized to take place between formal plenary sessions or commissions of a congress or of a conference, either on a subject chosen by the participants themselves or else on a special problem suggested by the organizers; 3) training session in which participants, often through exercises, develop skills and knowledge in a given field</td>
</tr>
</tbody>
</table>
Appendix I

Additional Resources


Overview: Following are several additional resources that you can access to learn more about individual topics as well as the meeting management industry.

Meeting Industry Association & Organization Websites

www.asaenet.org American Society of Association Executives
www.conventionindustry.org Convention Industry Council
www.mpiweb.org Meeting Professionals International
www.pcma.org Professional Convention Management Associations

Meeting Industry Endorsed Guides and Books

Conferon Guide to Meeting Management
By Conferon Global Services
Published in Convene Magazine (September 2000)
Available online at: http://www.conferon.com/solution/convene/index.html

APEX Accepted Practices: Revolutionizing the Meetings, Conventions and Exhibitions Industry
By Convention Industry Council
Available online www.conventionindustry.org.

by Convention Industry Council (2008)

Meetings and Conventions: A Planning Guide with 2006 Updated Forms.
By Meeting Professionals International (2006)

Professional Meeting Management: Comprehensive Strategies for Meetings, Conventions and Events (5th Edition)
By Professional Convention Management Association (2006)
References


Hyatt Regency Atlanta (2003). *Everything You Need to Know From A to Z. Meetings and Conventions: A*
Planning Guide with 2006 Updated Forms. Dallas, TX: MPI Foundation.

