Meeting and Business Event Competency Standards Curriculum Guide, (MBECS)

MPI

MEETING PROFESSIONALS INTERNATIONAL

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Table of Contents

A. INTRODUCTION — 1

1. What is the Purpose of this Guide?
2. How is this Guide Organized?
3. What Key Terms are Used in this guide?
4. What is the *MBECS*?
5. How can this Guide Benefit Educators?
6. How can this Guide Benefit Other Stakeholders?
7. What is MPI?
8. Acknowledgements

B. *MBECS* AND CURRICULUM LEVELS — 4

1. Three Levels of Curriculum
2. Progression to Exit Points
3. The Curriculum Levels Chart

C. PROGRAM DEVELOPMENT — 14

1. Purpose
2. Program Developments and Learning Outcomes Approach
3. Breadth, Depth and Complexity
4. Meeting Complexity Variables
5. Making a Program Unique: Specialization and Local Curriculum
6. Marketing the *MBECS* and Uniqueness of a Program
7. How Learning Outcomes and Teaching and Assessment Strategies are Connected to Program Development

D. LEARNING OUTCOMES — 21

1. Introduction
2. How the Sample Learning Outcomes Were Developed
3. Format of Course Outcomes
4. Sample Learning Outcomes that Incorporate the *MBECS*

E. TEACHING & ASSESSMENT STRATEGIES — 24

1. Introduction
2. Good Practices for Teaching and Assessment Strategies
3. Developing Teaching and Assessment Strategies with the *MBECS*
4. Sample Teaching and Assessment Strategies
5. Meeting Complexity Variables and Scenario Templates

F. PROGRAM REVIEW — 29

1. Program Review Levels
2. Reviewing Depth and Breadth of the *MBECS* in a Program
3. Reviewing the Complexity Level of Program Content

G. CAREER PATH — 32

1. Introduction
2. Titles and Variations in Workplace Roles and Responsibilities
3. Specialty Areas
4. Related Career Options

H. RESOURCES — 34

1. Meeting and Event Resources
2. Learning and Assessment Development Resources
3. Source Documents
4. Guide Appendices

List of Figures:

Figure B1.
MBECS Curriculum Levels Chart

Figure C1.
Program Development Flow Chart

Figure C2.
Program Development Process

Figure C3.
Breadth, Depth and Complexity Checklist for Program Development

Figure C4.
Local Curriculum

Figure D1.
Sample Learning Outcomes

Figure E1.
Sample Teaching and Assessment Strategies

Figure F1.
Sample Checklist for Reviewing Breadth and Depth of *MBECS* in Curriculum Review

List of Appendices:

Appendix 1.
Glossary

Appendix 2.
Standards Ratings and Curriculum Levels Chart

Appendix 3.
Checklist for Inclusion of *MBECS* in Curriculum

Appendix 4.
Sample Learning Outcomes

Appendix 5.
Curriculum Level-Descriptors for Learning Outcomes

Appendix 6.
Sample Syllabi

Appendix 7.
Sample Teaching and Assessment Strategies

Appendix 8A.
Checklist for Reviewing Breadth and Depth of *MBECS* in Curriculum

Appendix 8B.
Checklist for Reviewing Complexity of Learning of *MBECS* in Curriculum

Appendix 9.
Event Phases & Process Loop System

Appendix 10.
Meeting Complexity Variables and Scenario Templates

Appendix 11.
Sample Job Descriptions

Appendix 12.
TCEM Career Tree (Connectivity and Career Options Between Fields)

1. What is the purpose of this guide?

Industry professionals know the field, and the knowledge and abilities required to hold successful meetings and business events. This information is presented in the Meetings and Business Events Competency Standards (*MBECS*). The intent of this curriculum guide is to provide ideas and tools that allow educators to incorporate the *MBECS* in their curriculums, helping them provide relevant and quality programming to benefit of their students and institutions and the meeting profession.

The goals of the curriculum guide are to help educators:

- Benchmark existing programs and courses against globally recognized industry standards and
- Develop programs and courses that help learners meet industry expectations.

This guide outlines approaches and provides templates, samples and other resources to help instructors select content, define the appropriate breadth and complexity of that content, develop competency-based learning outcomes and design appropriate teaching and assessment strategies.

This guide is also intended to be flexible, not prescriptive, recognizing that educational institutions vary greatly in the focus of their programs, how they organize and approach teaching meeting and competencies and how much of the standards they incorporate.

By using the *MBECS* in their curriculums, educators can more easily promote the applicability of their programs and assess the comparability of programs among institutions. In some jurisdictions, post-secondary institutions must demonstrate that they have incorporated industry standards into their curriculums before their programs are accredited.

As the meeting industry emerges as a recognized profession, a review against the *MBECS* provides the ratings for benchmarking against other academic programs and against industry professional certification requirements.

2. How is this guide organized?

The guide has been developed in sections. The first three offer background information relevant to all readers. From there, educators can focus on the sections that apply to their needs.

3. What key terms are used in this guide?

Understanding the following terms is essential to understanding the processes and resources provided in this guide. They also help bridge the gap between academic and industry terminology and provide insight into the approach used to develop this guide. For a complete glossary, refer to Appendix 1.

Competency standards

- Benchmarks against which the competency of people working in a domain can be measured
- A description of knowledge and abilities (including professional attitudes) required for an occupation or field
- Created to provide clarification of the expectations of workers for the purposes of career planning, training and assessment

Curriculum levels or exit points

- Progressive levels of learning created to promote consistency and transferability among programs and educational institutions
- The exit benchmarks used herein reflect three progressive levels for program delivery related to three corresponding levels of workplace responsibility (coordinate, manage and direct)

Learning outcomes

- Statements that describe what learners should know and be able to do (knowledge, skills and abilities) at the end of a learning experience
- Created at different levels of specificity (program outcomes are more general than course outcomes)
- Described as outputs (what graduates can do) rather than inputs (what instructors can do to help learners achieve the goals)
- Often informed by competency standards and local needs assessments

4. What is the *MBECS*?

The Meeting and Business Event Competency Standards (*MBECS*) are a global, industry-endorsed description of the knowledge and abilities that experienced meeting professionals need in order to be successful. The *MBECS* are a meeting and business event specific adaptation of the Event Management International Competency Standards (*EMICS*) which were developed by the Canadian Tourism Human Resource Council (CTHRC) and the Events Management Body of Knowledge (EMBOK) partners in 2009 with the input of industry representatives from more than 20 countries.

The content of EMICS and MBECS is organized into the following categories:

A. Strategic Planning
B. Project Management
C. Risk Management
D. Financial Management
E. Administration
F. Human Resources
G. Stakeholder Management
H. Meeting or Event Design
I. Site Management
J. Marketing
K. Professionalism
L. Communication

The *MBECS* standards were developed to show the broad range of knowledge and abilities required of those who work in the meeting industry. They do not describe the competencies of one occupation, rather all of the competencies required of professionals in the field of meeting management at all levels of responsibility.

The *MBECS* standards also include contextual information for each skill or task, including the time it takes to master the skill (in years), the frequency at which it's performed or manifested and the level of its importance relative to the total job.

The standards serve many purposes for human resource development. They are used as a content source for education, recruitment, training, performance reviews, employee recognition and professional credentials.

The standards can be downloaded at www.mpiweb.org/*MBECS*. Along with this guide, they serve educators as a key resource for curriculum development in the area of meeting management.

5. How can this guide benefit educators?

This guide will help educators navigate the challenges that competency standards present, including the need to determine what should be taught and when, and the level of complexity and depth to which the competencies should be taught in a specific course or program.

For example, educators teaching a first-year course should not expect students to demonstrate the knowledge and abilities for strategic planning as presented in the standards—those competencies are expected of experienced meeting professionals in positions of high responsibility. Educators might, however, expect these students to know what strategic planning is and why it is important.

The *MBECS* Curriculum Guide can help educators achieve the following objectives.

a. Identify relevant and current content areas for programs and courses

b. Compare existing programs and courses to the *MBECS*

c. Translate the *MBECS* into program and learning outcomes in a consistent manner

d. Develop progressive curriculum at three levels of workplace responsibility (coordinate, manage and direct), which can also serve as exit points for program delivery

e. Write learning outcomes that clearly specify expectations of students, thereby facilitating articulation and credit-transfer agreements with other educational institutions and professional associations

f. Design and develop teaching and assessment strategies that match learning outcomes

g. Help prepare students for education and career goals, such as identifying course prerequisites and the range of employment options and incorporating industry credentials into programs

h. Market courses and programs a) as being based on global industry standards and b) with an accurate description of purpose and scope

6. How can this guide benefit other stakeholders?

Students and industry professionals will benefit from:

- Programs and courses that reflect global industry standards at three progressive levels
- A clear description of the courses learners should take
- A clear description of the depth and complexity of program or course content
- Improved opportunities for credit transfer and recognition of prior learning
- Increased evidence of industry responsiveness when requesting funding for new programs

Meeting and event professional associations will benefit from:

- Information with which they can base decisions on programs and courses that meet member training needs
- More program and course offerings that reflect consistent global industry standards

Employers and supervisors will benefit from:

- Clear descriptions of what students of courses and programs

will know and be able to do

- Assurance that potential and current employees who take programs and courses that incorporate the *MBECS* have learned relevant content
- Information to plan employee learning and development activities

Educational and training organizations will benefit from:

- Industry benchmarks against which to develop courses and programs
- Recognition from the industry as being accountable and responsive to expectations
- A comprehensive description of the field of practice to help identify and promote program specializations
- Common benchmarks on which to base articulation and transfer of credit agreements
- Evidence for meeting accreditation requirements

The benefits described above will assist educational institutions in marketing their programs and courses. The use of the *MBECS* by an educational institution is a significant signal of its desire to meet industry needs and will not go unnoticed by industry stakeholders.

7. What is MPI?

Established in 1972, Meeting Professionals International (MPI) is the largest trade association for the meeting industry. MPI is committed to defining and communicating the value meetings bring to individuals, organizations and the global economy. MPI plays a leadership role in the development of its members and the meeting industry. Encouraging and helping educators to use the *MBECS* for curriculum development and review is a key activity in that leadership role.

8. Acknowledgements

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1. Three Levels of Curriculum

The *MBECS* describes the competencies required by professionals in the entire field of meetings practice, not just a single occupation. Because its scope is broad and encompasses several occupations and levels of responsibility, the *MBECS* needs to be analyzed and presented in a manner that makes it easier for educators to use in curriculum development.

In the meeting and business event profession, individuals can progress in roles and responsibilities as they increase their knowledge and abilities. Broad responsibilities are based on three progressive workplace roles—to coordinate, manage and eventually direct meetings and business events. Descriptors of these three progressive role categories are outlined below.

Coordinate.
Individuals at the this level assist a meeting manager and are responsible for coordinating and implementing detailed meeting plans including the registration process, recruitment, training and supervision of volunteers and support staff. They also assist with reports and meeting evaluation. They work independently in areas of their responsibility and under the direction of a manager for all other responsibilities. They often gain broad exposure to the meeting industry in this role.

Manage.
Individuals at this level are responsible for planning and managing meetings to achieve strategic goals and objectives through program design, event implementation and management. They monitor and evaluate meeting outcomes and train and manage staff. They have considerable autonomy and responsibility for other staff. Where there is a position of meetings director in the organization, they take high-level direction from that individual.

Direct.
Individuals at this level may have roles and responsibilities that are part of the executive branch of an organization and may be responsible for connecting meeting and business event strategies to overall organizational strategies and business plans. Their location in the organization partly depends on the size of that organization and the number and complexity of meetings held. They work with other departments where applicable, and plan meetings based on research about, knowledge of and involvement in the broader industry. At the direct level they develop, manage and evaluate strategic objectives and financial plans and have responsibility for stakeholder, sponsor and funder relationships. They oversee all staff members on the meeting management team.

These three progressive workplace roles form the foundation for how the sub-skills in the *MBECS* have been organized for curriculum development. Each sub-skill is allocated to one of these three levels, depending on the complexity of learning required. The assigned level was determined using a formula based primarily on knowledge taxonomy ratings and secondly on performance taxonomy ratings and years to master ratings (see Appendix 2, Standards Rating and Curriculum Levels). The assigned level reflects when instruction on each sub-skill will be completed.

2. Progression to Exit Points

These three curriculum levels are progressive. The manage level builds on and incorporates the competencies assigned to the coordinate level, and the direct level, in turn, builds on the competencies assigned to the manage level. These progressive curriculum levels provide educators and students with reference points for planning career paths and related learning. They also serve as exit points for program delivery completion. The exit points reflect when instruction on a sub-skill should be completed and that, hopefully, will correspond with the achievement of an educational qualification such as a certificate, diploma or a degree. The names of qualifications will vary among educational systems.

This guide encourages post-secondary up to undergraduate degree programs to cover the knowledge requirements—and the performance requirements to the greatest degree possible—at the coordinate and manage curriculum levels.

3. The Curriculum Levels Chart

In the following table (Figure B1) you will find a list of the *MBECS* sub-skills and their specified exit (i.e., completion) levels. All topics can be introduced at the coordinate level, as sub-skills assigned to the manage or direct curriculum levels can be introduced in a less complex manner then.

As illustration of this, consider sub-skill 24.01: Create logistics action plan for set up and take down. Learning experiences related to this sub-skill could be introduced at the coordinate level and finished by the manage level. The sub-skill 24.04—Take down site—on the other hand, would be introduced and completed at the coordinate level. Delivery and sequencing, however, should be at the discretion of programs.

These curriculum exit levels are related to content topics,

not to time frames. It's not assumed that all the coordinate introductory knowledge would or could be completed in Year 1, and the manage level content in following years. It does, however, attempt to ensure that those delivering a manage-level program (which covers both coordinate and manage levels) at some point cover both coordinate- and manage-level knowledge and skills.

These curriculum exit levels were developed using an adapted version of Bloom's Taxonomy to identify the complexity levels of the MBECS sub-skills according to knowledge level ratings of one (lowest) to six (highest), and performance/ability level ratings, also one to six (see Appendix 2). The knowledge rating was the primary factor considered in the assignment. The performance ratings and the "years to master" ratings were secondary factors. Sub-skills with a knowledge rating of 1 or 2, and sometimes 3 (depending on the performance and "years to master" ratings), were assigned to the coordinate level. Sub-skills with a knowledge rating of 3 or 4, and sometimes 5, were assigned to the manage level. Finally, sub-skills with ratings of 5 or 6 were assigned to the direct level. The assignment of sub-skills to the coordinate, manage, or direct level serve as curriculum exit points and global benchmarks.

For an example of how these curriculum levels translate into program and course learning outcomes at varying levels of complexity, refer to Section D."

Figure B1 *MBECS* Curriculum Levels Chart

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
A. STRATEGIC PLANNING			
1. Manage Strategic Plan for Meeting or Event			
1.01 Develop mission goals & objectives			
1.02 Determine feasibility of meeting or event			
1.03 Determine requirements to carry out meeting/event			
1.04 Develop financial summary			
1.05 Monitor strategic plan			
2. Develop Sustainability Plan for Meeting or Event			
2.01 Implement sustainability management plan			
2.02 Demonstrate environmental responsibility			
3. Measure Value of Meetings and Business Events			
3.01 Develop evaluation plan			
3.02 Measure return on investment			
3.03 Evaluate/audit meeting or event			
3.04 Evaluate effectiveness of risk management plan			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
B. PROJECT MANAGEMENT			
4. Plan Meeting or Event			
4.01 Develop project plan			
4.02 Develop quality standards, policies, procedures			
4.03 Develop theme for event			
4.04 Develop procurement plan			
4.05 Establish milestones and critical path			
4.06 Develop integrated communication plan			
4.07 Develop evaluation/audit procedures			
5. Manage Meeting or Event Project			
5.01 Manage critical path			
5.02 Manage contracts			
5.03 Manage running of meeting or event			
C. RISK MANAGEMENT			
6. Manage Risk Management Plan			
6.01 Identify risks			
6.02 Analyze risks			
6.03 Develop management and implementation plan			
6.04 Develop and implement emergency response plan			
6.05 Arrange security			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
D. FINANCIAL MANAGEMENT			
7. Develop Financial Resources			
7.01 Manage sponsorship process			
7.02 Manage donor process			
7.03 Manage program funding process			
7.04 Manage registration process			
8. Manage Budget			
8.01 Develop budget			
8.02 Establish pricing			
8.03 Establish financial controls and procedures			
8.04 Manage cash flow			
8.05 Monitor budget performance			
8.06 Revise budget			
9. Manage Monetary Transactions			
9.01 Establish cash handing procedures			
9.02 Monitor cash handling procedures			
E. ADMINISTRATION			
10. Perform Administrative Tasks			
10.01 Coordinate office administration			
10.02 Manage information system			
10.03 Write reports			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
F. HUMAN RESOURCES			
11. Manage Human Resource Plan			
11.01 Determine workforce requirements			
11.02 Establish workforce policies and procedures			
11.03 Develop training plan			
11.04 Monitor human resources plan			
12. Acquire Staff and Volunteers			
12.01 Develop selection criteria			
12.02 Recruit staff and volunteers			
12.03 Interview candidates			
12.04 Select best candidate and offer position			
13. Train Staff and Volunteers			
13.01 Provide orientation			
13.02 Provide training			
14. Manage Workforce Relations			
14.01 Supervise staff and volunteers			
14.02 Motivate staff and volunteers			
14.03 Manage teams			
14.04 Evaluate staff			
14.05 Process terminations and resignations			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
G. STAKEHOLDER MANAGEMENT			
15. Manage Stakeholder Relationships			
15.01 Identify stakeholders			
15.02 Assess stakeholders			
15.03 Classify stakeholders			
15.04 Manage stakeholder activities			
15.05 Manage stakeholder relationship			
H. MEETING OR EVENT DESIGN			
16. Design Program			
16.01 Determine program components			
16.02 Select program content and delivery formats			
16.03 Structure and sequence program components			
17. Engage Speakers and Performers			
17.01 Determine event requirements for speakers and performers			
17.02 Develop selection criteria			
17.03 Select candidates			
17.04 Secure contracts and communicate expectations			
18. Coordinate Food and Beverage Services			
18.01 Determine food & beverage service requirements			
18.02 Select menu(s)			
18.03 Plan service style(s)			
18.04 Select food and beverage provider(s)			
18.05 Manage alcohol service			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
H. MEETING OR EVENT DESIGN (continued)			
19. Design Environment			
19.01 Establish functional requirements			
19.02 Select decor and furnishings			
19.03 Coordinate meeting or event signage			
20. Manage Technical Production			
20.01 Determine requirements for staging and technical equipment			
20.02 Acquire staging and technical equipment			
20.03 Install staging and technical equipment			
20.04 Oversee technical production operation			
21. Develop Plan for Managing Movement of Attendees			
21.01 Develop admittance credential systems			
21.02 Select crowd management techniques			
21.03 Coordinate accommodation and transportation			
21.04 Manage protocol requirements			
I. SITE MANAGEMENT			
22. Select Site			
22.01 Determine site specifications			
22.02 Identify and inspect sites			
23. Design Site Layout			
23.01 Design site layout			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
I. SITE MANAGEMENT (continued)			
24. Manage Meeting or Event Site			
24.01 Create logistics action plan for set-up & take-down			
24.02 Set up site			
24.03 Monitor site during meeting or event			
24.04 Take down site			
25. Manage On-site Communication			
25.01 Establish communications framework			
25.02 Determine & acquire required communication equipment			
25.03 Specify communication procedures and protocols			
J. MARKETING			
26. Manage Marketing Plan			
26.01 Conduct situational analysis			
26.02 Define target market segments			
26.03 Develop branding for meeting or event			
26.04 Select marketing distribution channels			
26.05 Develop integrated marketing strategy			
26.06 Implement marketing plan			
27. Manage Marketing Material			
27.01 Determine marketing materials needed for event			
27.02 Develop content and design parameters			
27.03 Produce marketing materials			
27.04 Distribute marketing materials			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
J. MARKETING (continued)			
28. Manage Meeting or Event Merchandise			
28.01 Develop product(s) design and specifications			
28.02 Determine pricing			
28.03 Control brand integrity			
28.04 Produce merchandise			
28.05 Distribute merchandise			
28.06 Coordinate hospitality			
29. Promote Meeting or Event			
29.01 Develop advertising plan			
29.02 Develop cross-promotional activities			
29.03 Develop contests			
29.04 Coordinate sale promotion			
30. Contribute to Public Relations Activities			
30.01 Contribute to public relations strategy			
30.02 Contribute to publicity plan			
30.03 Develop media relations			
30.04 Contribute to implementation of publicity plan			
30.05 Manage crises and controversies			
31. Manage Sales Activities			
31.01 Develop sales plan and objectives			
31.02 Conduct sales activities			
31.03 Determine sales platforms			

Figure B1 *MBECS* Curriculum Levels Chart (continued)

For Standards Ratings and Curriculum Levels Chart used to identify the curriculum levels, see Appendix 2.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
K. PROFESSIONALISM			
32. Exhibit Professional Behaviour			
32.01 Project a professional image	Interwoven throughout programs		
32.02 Demonstrate leadership			
32.03 Demonstrate ethical behaviour			
32.04 Work with colleagues			
32.05 Work in a diverse environment			
32.06 Manage time			
32.07 Manage stress			
32.08 Make decisions			
32.09 Solve problems			
32.10 Keep up to date w/ changes in meetings/event industry			
32.11 Facilitate continuous improvement			
32.12 Participate in professional development activities			
L. COMMUNICATION			
33. Conduct Business Communications			
33.01 Communicate verbally	Interwoven throughout programs		
33.02 Communicate in writing			
33.03 Use communication tools			
33.04 Make effective presentations			
33.05 Plan and conduct meetings			
33.06 Establish and conduct business relationships			

1. Purpose

Program development related to meetings and business events may take a number of forms. This guide will be most useful for:

• Initiating a new meetings and business events program or stream where none existed, and

• Expanding the emphasis on meetings and business events in an existing program, possibly from one or two introductory courses to a specialty stream or a total program emphasis.

Academic programs have two key purposes: to prepare students for further learning and to prepare students for the workplace. The emphasis on these two purposes varies by program. Programs whose main purpose is preparation for employment want to ensure that students learn to apply knowledge and abilities to the greatest extent possible through appropriate learning strategies. As well, the learning outcomes for those programs specify the application of knowledge and skills to the appropriate level for the program (see Section D).

Professionalism, communication and positive attitudes are key outcomes sought by employers. Although professionalism and communication are identified as separate components in the *MBECS*, they should be interwoven throughout a program.

2. Program Developments and Learning Outcomes Approach

In today's environment, programs are described in terms of what graduates should know and be able to do. This learner-centered approach takes a different perspective from the earlier teacher-centered approach that defined a program in terms of what a teacher would deliver.

The learner-centered approach makes program descriptions more transparent for learners, faculty and employers. Learning outcomes are statements that describe the knowledge, skills and abilities that students should be able to demonstrate at the end of a learning experience. Learning outcomes make curriculum goals clear and transparent to all stakeholders. They also provide measurable statements for assessment, and they can be described at three levels: institutional, program and course.

Institutional outcomes usually describe what all graduates of an institution should know and be able to do upon graduation. They describe the core skills and abilities graduates need to succeed in a world that demands continuous learning—skills like critical thinking, problem solving, writing, speaking, researching and using technology. Institutional outcomes are transferable to various industries and workplace settings.

Program outcomes describe what graduates should know and be able to do as a result of learning experiences within a specific program. They incorporate institutional outcomes. Program outcomes typically require students to demonstrate higher levels of a particular institutional outcome, or performance of the outcome in a context unique to that discipline.

Program outcomes also include industry- or subject-specific outcomes. It's essential that program outcomes refer to the outcomes of the entire program leading to relevant qualification.

When writing them, consider:

- Program purpose (entry to further education or entry to work)
- Level (or complexity) of learning required for the qualification, subject or professional benchmarks
- Program specialties or focus (meetings and business events)

Program outcomes should include:

- Knowledge requirements (described at the required level of difficulty of the qualification or complexity, breadth and depth)
- Practical or functional skills of the profession or program area (described at the expected level of performance or ability at completion of the program)
- Transferable skills such as communication, teamwork, critical thinking and analysis gained in the program.

Course outcomes are more specific and detailed. They contain a subject and a behavior or action verb (list, explain, analyze, recommend or develop) that can be observed and measured and that describes the type and complexity of the action expected. They may also contain information such as conditions in which the behavior must be demonstrated and criteria of acceptable performance. Course outcomes connect to program outcomes and should cover all the knowledge, skills and abilities promised in the program outcomes.

Figure C1 demonstrates the flow of developing course outcomes from program outcomes.

Figure C1 - Program Development Flow Chart

***MBECS*:** Covers the competency standards for professionals in the field of practice of meetings and business events.

Describes the overall knowledge and abilites expected of experienced professionals across the field in a range of situations in a variety of organizations.

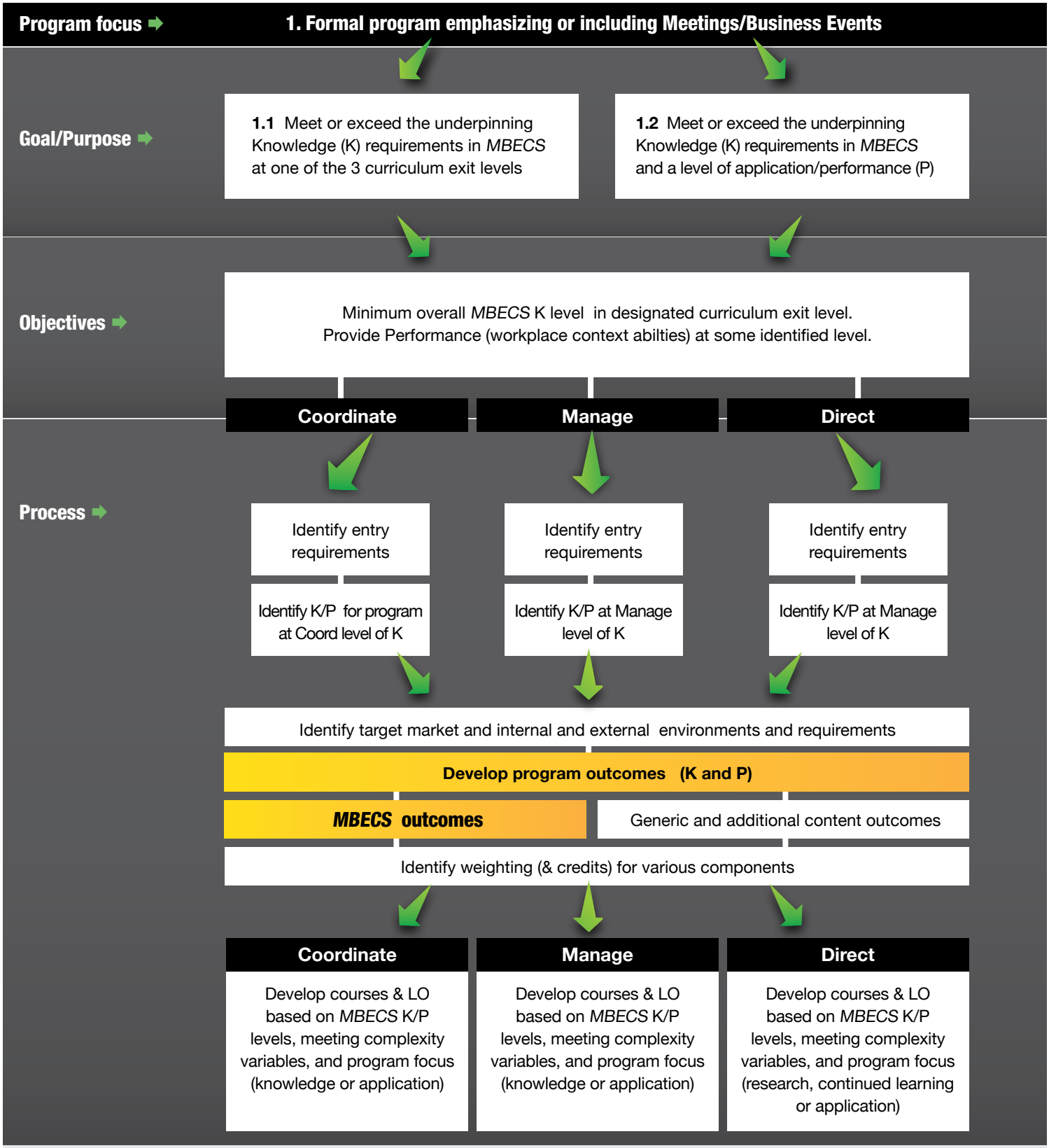
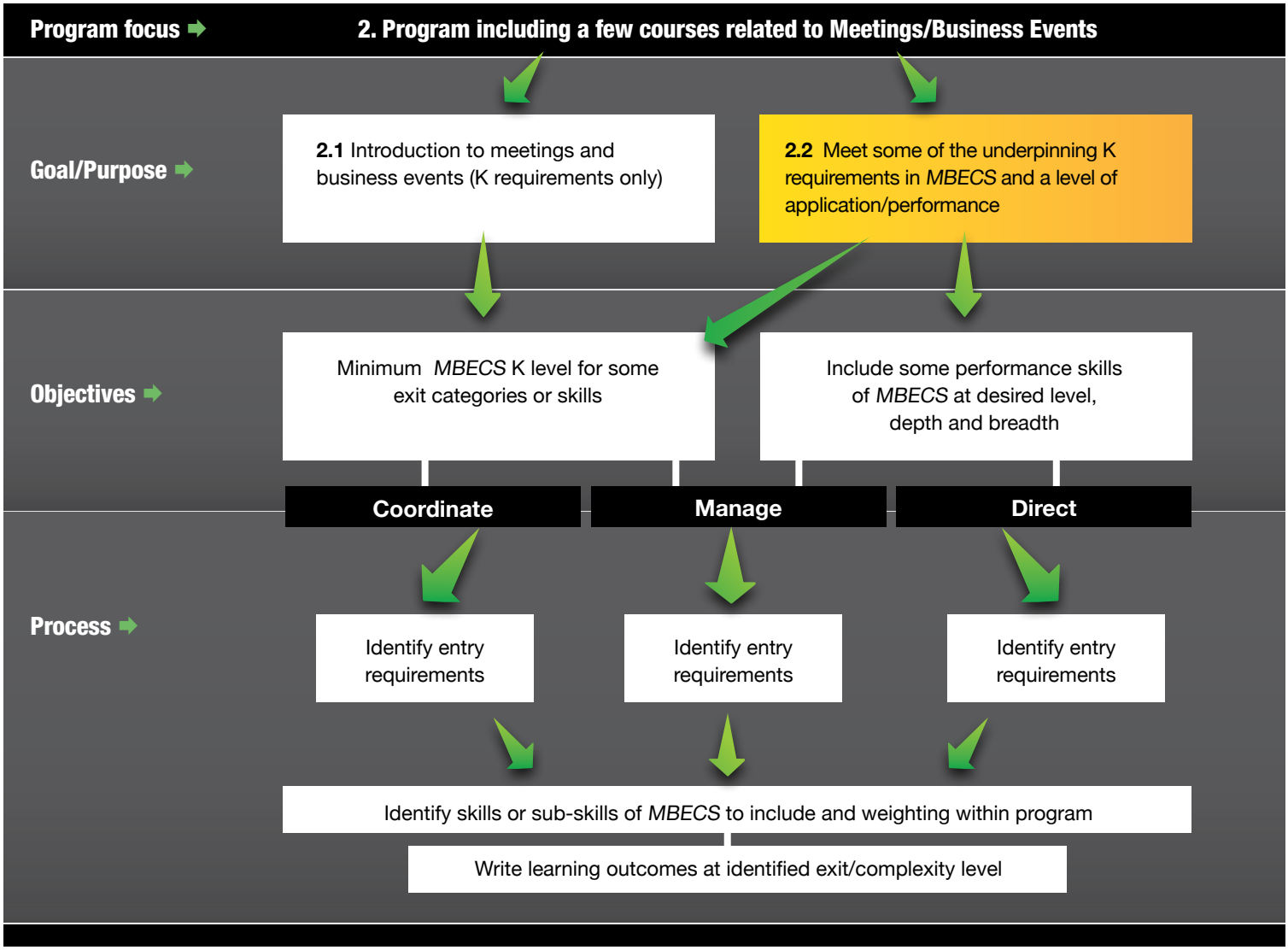


Figure C1 - Program Development Flow Chart (continued)



Once program outcomes are established, their attainment must be achieved through course outcomes. If the program covers more than one level (such as a bachelor's degree that might encompass a certificate or diploma as an early exit point or entrance requirement), it's useful to break down the aims of the program over the levels so that educators can verify that students are progressing toward program outcomes throughout the program.

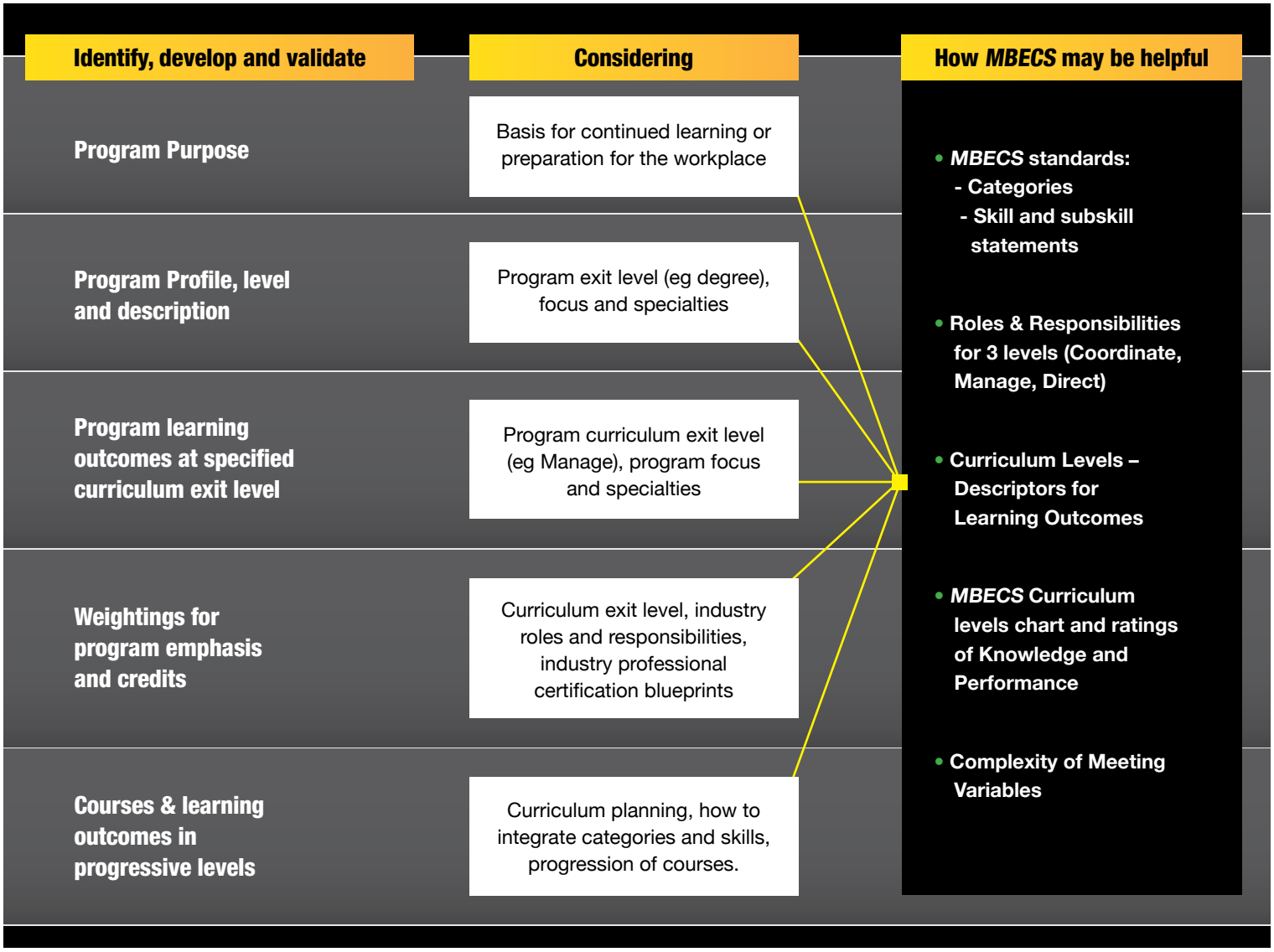
Institutions incorporate industry-recognized standards such as the *MBECS* into learning outcomes to help make their programs industry-responsive. This allows them to legitimately claim that they provide graduates with the competencies expected in the workplace. Appendix 4 provides examples of learning outcomes that incorporate the *MBECS* at the designated curriculum level (coordinate, manage or direct).

This curriculum guide illustrates how educators can include the competencies identified in the *MBECS* in a progressive fashion within their curriculums, illustrated in a flexible fashion to allow for individual programs to decide where the competencies will be taught (e.g., project management may be taught in a general business course or it may be taught in specific meetings-related courses) and their order of delivery. Educators also need flexibility to allow for additional breadth or depth on topics that make up specialty areas of the program. Exit benchmarks are key to consistency and transferability within the industry and between institutions.

Curriculum will not be developed based strictly on the *MBECS*; the content of the standards will be integrated with other concepts and themes that form parts of programs. For example, risk management may be taught in a business course as a general concept; however, risk management related to meetings can provide a theme that links many skill areas in courses on meetings management. This guide provides development suggestions and resources specific to the *MBECS* categories and skills.

However, it is expected that faculty will combine skills and develop integrated learning outcomes based on their own program focuses. Figure C2 illustrates how the *MBECS* can be helpful in the process of developing new or enhanced programs in meetings and business events.

Figure C2 - Program Development Process



3. Breadth, Depth and Complexity

Curriculum planning considers the organization of subject matter, the educational purposes it serves, the learning results toward which it builds and the methods through which the results will be achieved and assessed. Curriculum planning, therefore, starts with the "big picture," describing the breadth and depth of the program through program learning outcomes, which then lead to the development of measurable assessment and instructional strategies and activities.

The *MBECS* define the knowledge, skills and abilities (competencies) required for successful professional practice in meeting and business event management. These competencies do not define the abilities required of a single occupation, but rather those required for the entire field of meeting and business event management. Educational institutions preparing students for the workplace need to cover the full range of major categories presented in *MBECS* so students are prepared for a range of job opportunities.

When considering the breadth, depth and complexity of the *MBECS* to include in curriculum, the following may be useful.

- To identify the breadth of content inclusion from the *MBECS* in your curriculum, answer the question, "Should our curriculum include the content on each category and skill?"
- To identify the depth of content inclusion from the *MBECS* in your curriculum, answer the question, "Should our curriculum include content on each sub-skill to achieve our purpose and program outcomes?"
- To identify the complexity level of learning required to meet the *MBECS*, the curriculum exit (completion) level needs to be determined by answering the questions, "Is our program to be at the Coordinate or Manage level of industry requirements?" and "Can we meet the designated knowledge and/or performance ratings for each—or most—sub-skills?"

Figure C3 BREADTH, DEPTH AND COMPLEXITY CHECKLIST FOR PROGRAM DEVELOPMENT (SAMPLE)

A sample of the checklist to determine breadth, depth and curriculum exit level (complexity) from Appendix 2.

If you are unsure of what is intended in a standard statement, check the *MBECS* standards document for details.

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
A. STRATEGIC PLANNING								
1. Manage Strategic Plan for Meeting or Event	8 yrs	0	5					
1.01 Develop mission goals & objectives				6	6			
1.02 Determine feasibility of meeting or event				5	3			
1.03 Determine requirements to carry out meeting/event				5	3			
1.04 Develop financial summary				3	4			
1.05 Monitor strategic plan				5	4			
2. Develop Sustainability Plan for Meeting or Event	5 yrs	PP	4					
2.01 Implement sustainability management plan				6	6			
2.02 Demonstrate environmental responsibility				6	4			

Figure C3 BREADTH, DEPTH AND COMPLEXITY CHECKLIST FOR PROGRAM DEVELOPMENT (CONTINUED)

Frequency Ratings: O = occasionally; PP = per project; RR = routinely/regularly **Importance Ratings:** 1-5, 5 being highest	**Context Rating**			**Blooms Taxonomy**		**Academic Level**		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
3. Measure Value of Meetings and Business Events	8 yrs	RR	5					
3.01 Develop evaluation plan				6	6			
3.02 Measure return on investment				4	5			
3.03 Evaluate/audit meeting or event				5	4			
3.04 Evaluate effectiveness of risk management plan				5	4			
B. PROJECT MANAGEMENT								
4. Plan Meeting or Event	3 yrs	Daily	5					
4.01 Develop project plan				6	4			
4.02 Develop quality standards, policies, procedures				6	4			
4.03 Develop theme for event				6	4			
4.04 Develop procurement plan				6	3			
4.05 Establish milestones and critical path				6	4			
4.06 Develop integrated communication plan				6	4			
4.07 Develop evaluation/audit procedures				6	4			
5. Manage Meeting or Event Project	5 yrs	Daily	5					
5.01 Manage critical path				5	4			
5.02 Manage contracts				5	4			
5.03 Manage running of meeting or event				3	4			

4. Meeting Complexity Variables

As noted, learning outcomes should be described in terms that reflect the level or complexity of learning required. When considering the learning strategies to include in curriculum and scenarios for classroom discussion, there are some components of meetings and business events that can be combined with one another along a range of complexity. These components include:

1. Type of host organization (corporate, association, nonprofit)
2. Culture of host organization
3. Meeting goals and objectives
4. Relationship to other strategic and business plans (corporate/association/professional)
5. Profile of meeting attendees (variation in age, income level, cultures and language)
6. Local, regional, national or international in scope
7. First time or repeat event
8. Size and location of event
9. Financial parameters (sponsorship and funding requirements)

The above listing offers considerations for ways in which to increase (or limit) the complexity of scenarios and examples used in the classroom. For example, take Skill 8: Manage Budget and sub-skill 8.01 Develop Budget. By referencing the *MBECS* Curriculum Levels Chart (see Section B), we see that 8.01 is listed as a manage completion level (the teaching related to the benchmark would be completed here), but it should be introduced at the coordinate level. Here, budgets are defined and components introduced, and students develop basic meeting budgets. However, the more complex components of budgeting such as international funds, taxes, local legislation and more detailed components such as pricing variables and financial controls and procedures for multi-venue, multi-day meetings are taught at the manage level. Appendix 10 includes the list of meeting complexity variables followed by sample scenarios that can be adapted to different levels of complexity for a single course or progressive courses.

5. Making a Program Unique: Specializations and Local Curriculum

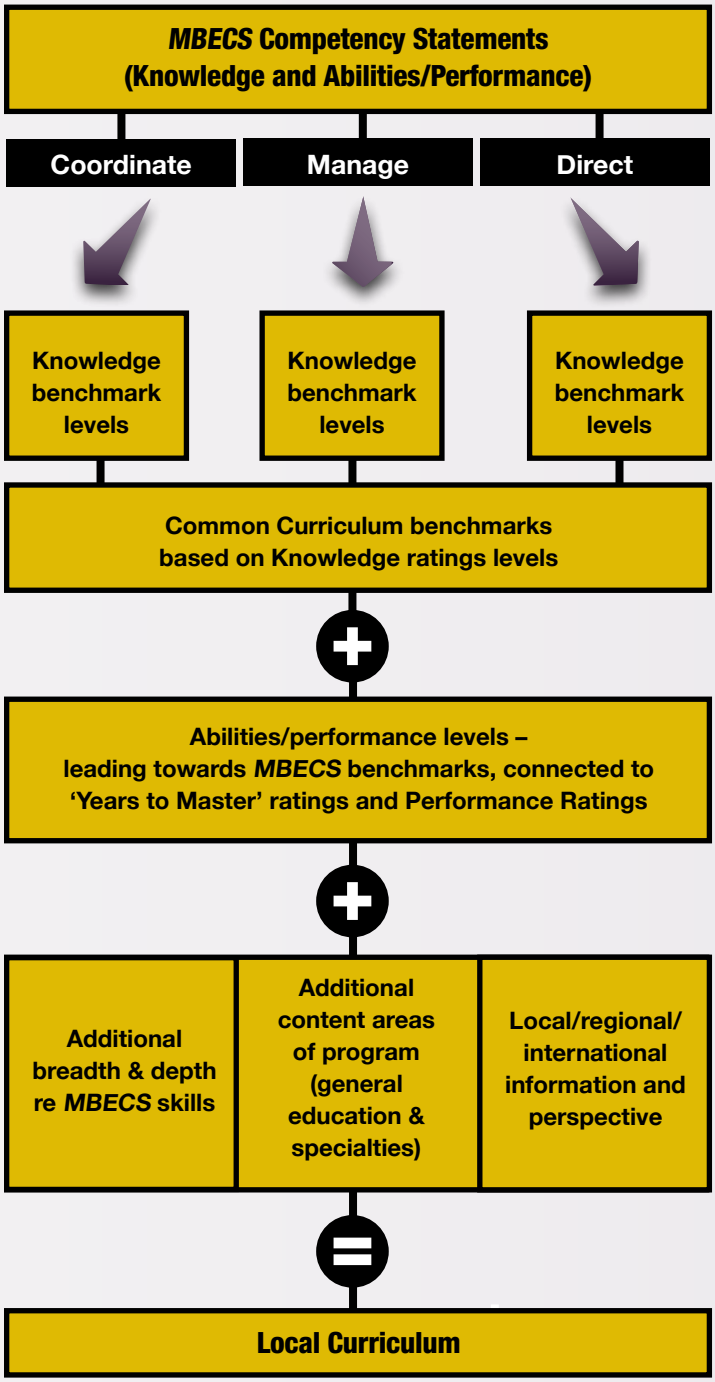
In addition to incorporating common benchmarks, institutions want to be able to distinguish their programs from those of other institutions. This may involve going beyond the benchmarks with additional breadth and depth for a specialty area within the *MBECS*, or additional program content areas designed to meet particular regional needs. The benchmarks form the basis, and the additional learning provides the "signature" of the institution.

Post-secondary programs following secondary school are not likely to produce graduates who are able to perform at the proficiency level of the standards as indicated by the performance and time-to-master ratings (see Appendix 2). Experience in the industry is required to reach the required level of performance, as half the sub-skills require five or more years to master. Programs may or may not include internships or co-op programs for learners to practice and gain workplace skills. Therefore knowledge level ratings provide a consistent minimum curriculum benchmark among programs.

As well, the extent to which programs are competency-based and are able to incorporate the application of knowledge and skills (abilities used in a workplace setting) also differentiate programs, as noted throughout this guide.

The outcomes incorporated into a program beyond or in addition to those that relate to the *MBECS* make a program unique. The specializations and "local curricula" along with the incorporation of industry benchmarks (the *MBECS*) can help institutions market their programs. Figure C4 portrays the benchmark and unique elements of any program.

Figure C4 - Local Curriculum



6. Marketing the *MBECS* and Uniqueness of a Program

Programs that incorporate the *MBECS* as well as a unique focus may want to include the following statements in program descriptions.

- Individuals and associations in the global meeting industry have endorsed the *MBECS* as the most comprehensive list of knowledge and skills required for meeting management. Our program provides students with the knowledge required to meet these industry standards and provides a level of skills that allows individuals to enter the industry with the necessary preparation.
- The academic content of this program includes all (or key or specific) competencies outlined in the *MBECS*, an international industry-developed standard describing the knowledge and abilities required for competency at the (coordinate/manage/direct levels) within the realm of meeting planning and management.
- Our program is distinctive because it includes extensive knowledge (and practice) in the key areas of ___ within the meeting industry.
- In addition to learning the industry-benchmarked competencies required of a coordinator/manager in the meeting industry, our program provides specialized skills in ___.
- Students will learn the competencies required in the meeting industry through classroom discussion, research, simulations, site visits, industry speakers and industry placement terms.

7. How Learning Outcomes and Teaching and Assessment Strategies are Connected to Program Development

Section D (Learning Outcomes) describes how to use the *MBECS* standards to develop learning outcomes, first at the program level and then at the course level. The section that follows (Teaching and Assessment Strategies) describes how to use learning outcomes and the *MBECS* to develop teaching and assessment strategies. This process provides clarity and consistency in what is expected of learners and keeps instructors and learners focused on desired end results.

Once educators have defined what learners should know and be able to do at the end of a course, they need to determine what methods they will use to help learners achieve those outcomes and how they will assess learners in order to support and assess their progress—the teaching and assessment strategies that must match course outcomes in content and complexity.

1. Introduction

The previous section discussed how three levels of learning outcomes (institutional, program and course) are used to develop post-secondary programs. This section provides more information about how to develop learning outcomes for programs and courses and provides examples of outcomes that incorporate the *MBECS*. Sample outcomes are provided here at the program and course levels for two categories—B. Project Management and I. Site Management. Sample learning outcomes for all categories can be found in Appendix 4.

2. How the Sample Learning Outcomes Were Developed

Below is a list of resources that were used to develop the sample learning outcomes. The Standards Rating and Curriculum Levels Chart and the *MBECS* Curriculum Levels help clarify and identify the level of complexity at which the content should be taught. Curriculum Levels – Descriptors for Learning Outcomes and the *MBECS* provide guidance for the content and wording for the learning outcomes.

- Standards Rating and Curriculum Levels Chart (Appendix 2). This document allocates each sub-skill to one of three curriculum exit/completion levels based on the complexity of learning required and workplace responsibilities. The curriculum levels are coordinate, manage and direct. These levels were determined using a formula based primarily on knowledge taxonomy ratings and secondarily on performance taxonomy ratings and years to master ratings.
- The *MBECS* Curriculum Levels Chart (Section B). This table provides a list of the *MBECS* sub-skills and their specified introduction and exit levels. All topics may be introduced (even if just in a what/why manner) at the Coordinate level. Sub-skills assigned to the manage or direct curriculum levels are introduced at a less complex manner at the coordinate level. It is a simplified version of Appendix 2.
- Curriculum Levels - Descriptors for Learning Outcomes (Appendix 5). This resource includes two tables that provide descriptors of expectations at each of the three levels: coordinate, manage and direct. The first table focuses on knowledge expectations and the second on performance expectations.

The *MBECS* (download at www.mpiweb.org/*MBECS*).

- The first step in developing learning outcomes is to identify the exit points for the skill statements in each category and based on that, determine what should be taught at each level. All topics are introduced at the coordinate level, but the depth of the introduction depends on whether the exit point is at the coordinate, manage or direct level. From there, the above resources can be referred to repeatedly to identify and confirm the appropriate content and wording in the learning outcomes at each level. At times, it may be necessary to consult the details attached to each sub-skill to clarify the knowledge and abilities that can be expected of learners at the different levels.

Note that the sample learning outcomes are written in the context of the field of meetings and business events only. Post-secondary institutions may choose to cover some of the competencies in the context of other fields (and within other courses) such as finance or business management. In addition, the sample learning outcomes are based only on the *MBECS*. When developing learning outcomes, post-secondary educators will use additional resources such as institutional standards, program guidelines, textbooks and electronic media.

Check out the course syllabi in Appendix 6 to see how various courses describe the breadth, depth and complexity of what a student can expect to learn.

3. Format of Course Outcomes

The format of the sample course outcomes consists of an action verb and a subject. For example, "follow project plans" (coordinate level) or "develop a plan" (manage level). The selection of an appropriate action verb is important to the development of learning outcomes at the course level. The action verb specifies what is expected of learners and, therefore, what strategies are appropriate for teaching and assessment. A number of resources have been included in the Appendices of this guide to help educators select the correct action verb, including Curriculum Levels - Descriptors for Learning Outcomes (Appendix 5) and the lists of verbs found in Section H.2 (Learning and Assessment Development Resources). Learning outcomes should reflect the complexity of knowledge and abilities required at the level of the program or course.

Criteria and conditions need to be added in order for the outcomes to be measurable. In some forms of learning outcomes, these are included within the outcome statement itself. For example, "Develop a procurement plan that provides guidelines for the event team to ensure that necessary products and services are obtained." In other forms, the criteria may be specified in sub-statements or in performance criteria. In other forms, the criteria for measuring achievement may be

associated with the assessment process and called "criteria for assessment."

Educators may choose to use different formats for their learning outcomes based on institutional requirements and personal preference. Examples of other formats for learning outcomes include the following.

- An action verb and subject content with level of achievement and conditions of performance
- Terminal objectives with enabling objectives
- General behavioral statements with specific examples of behavior

Because the sample course outcomes are stated in the context of application in the workplace, educators may wish to develop more specific or enabling outcomes for each course outcome that clarify the specific knowledge and abilities needed in order to carry out those workplace responsibilities.

4. Sample Learning Outcomes that Incorporate the *MBECS*

Sample learning outcomes are organized according to the categories in the standards.

There are sample program outcomes for each category and sample course outcomes for only two categories: B. Project Management and I. Site Management in Appendix 4. In Figure D2, find sample program and course outcomes for Category B. Project Management.

Figure D1 - Sample Learning Outcome for Category B. Project Management

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
B. PROJECT MANAGEMENT			
4. Plan Meeting or Event			
4.01 Develop project plan			
4.02 Develop quality standards, policies, procedures			
4.03 Develop theme for event			
4.04 Develop procurement plan			
4.05 Establish milestones and critical path			
4.06 Develop integrated communication plan			
4.07 Develop evaluation/audit procedures			
5. Manage Meeting or Event Project			
5.01 Manage critical path			
5.02 Manage contracts			
5.03 Manage running of meeting or event			

Programs that cover project management at the:

Coordinate Level

Will provide graduates with knowledge and abilities that prepare them to:

Provide input into and follow project plans for meeting or event; maintain flow of activities by ensuring key resources and personnel are in place.

Manage Level

Will provide graduates with knowledge and abilities that prepare them to:

Manage meeting or event to achieve mission, goals, objectives and quality standards within the constraints of the meeting's scope, time and budget.

Direct Level

Will provide graduates with knowledge and abilities that prepare them to:

Develop creative and comprehensive meeting or event plans based on industry standards and strategic plan; establish objective measurement and audit criteria for highly complex events.

Undergraduate courses that cover project management at the:

Coordinate Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Provide input into project plans using their knowledge of the event and creativity for the manager's consideration.

2. Follow the project plans to ensure activities contribute to achieving the event's goals and quality standards.

3. Maintain the flow of activities during the event by following the agreed-upon plans.

Manage Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Develop a plan that will allow the project team to achieve the event's mission, goals and objectives.

2. Develop quality standards, policies and procedures to ensure the event meets legal, regulatory, ethical and social requirements.

3. Develop a theme for the event that reflects stakeholders' expectations, branding and creativity.

4. Develop a procurement plan that provides guidelines for event team to ensure necessary products and services are obtained within budget.

5. Establish milestones and a critical path for the event by identifying links, timelines and critical dates.

6. Develop a communication plan that specifies policies and procedures for information collection, distribution, document design, storage and security.

7. Develop evaluation/audit policies and procedures that incorporate critical success factors.

8. Manage critical path by continually monitoring for variances and implementing corrective action as needed.

9. Manage procurement process by developing RFPs, evaluating proposals, negotiating contracts, and ensuring contractual obligations are met.

1. Introduction

One of the objectives of this guide is to help educators develop teaching and assessment strategies that incorporate the *MBECS* and match learning outcomes. Matching teaching and assessment strategies to learning outcomes is easier when using competency standards. When programs are competency-based, learning outcomes and teaching and assessment strategies all relate back to those standards, creating consistency throughout the elements of the curriculum.

In addition, teaching and assessment strategies that use the context of the workplace for knowledge application and skills practice increase the relevance for learners, maximize the transfer of learning and better prepare learners for entry into the workplace. A competency-based approach also helps learners determine if their strengths and interests match the field of practice they are studying.

As stated in previous sections, learning outcomes describe the knowledge, skills and abilities that students should be able to demonstrate at the end of a learning experience. They keep learning focused by serving as the reference point for teaching and assessment strategies.

2. Good Practices for Teaching and Assessment Strategies

Teaching strategies are methods that instructors use to help learners achieve outcomes for a specific course, module or lesson. The learning outcomes serve as goals to reach. Instructors use their knowledge of teaching and learning methods and strengths and preferences related to learning styles—plus creativity—to design activities that interest learners and provide them with the knowledge and abilities needed to achieve learning outcomes.

When developing teaching strategies, educators expose their learners to the workplace as much as possible. They do this by using authentic workplace documents in learning activities, hosting guest speakers, organizing field trips and providing opportunities for job shadowing, work-based projects, internships and other types of work experience. Work experience provides learners with first-hand, real-life information in the context of what they learn in the classroom. And there is no better way to build a network in the industry and gather information for career planning.

Educators also make learning active. This includes increasing student participation and responsibility for their own learning. Having learners do self-assessments is one way to achieve this. Other ways include giving them opportunities to apply knowledge and practice skills. Educators ask learners to share opinions, summarize key points, create documents, analyze situations, solve problems, organize small meetings, evaluate business events, do the setup and takedown of a simulated business event and so forth.

Assessment strategies are methods that instructors use to determine the extent to which learners have progressed toward the learning outcomes. Formative assessments are used throughout a learning experience and are an important part of the learning process. They give educators an opportunity to monitor learner progress and provide feedback. While formative assessments are appraisals for learning, summative assessments are appraisals of learning. Summative assessments give educators an opportunity to determine the extent to which learners have achieved the learning outcomes at key stages, or at the end of a learning experience.

When developing assessment strategies, instructors should focus on the expectations expressed in learning outcomes and ensure that the assessment activities will test learners' progress towards those expectations. Fair assessments provide information to learners about what skills and abilities are being tested and what criteria will be used to judge success. The *MBECS* standards serve as a source of observable and objective criteria.

Summative assessments provide a good opportunity for a holistic approach in which instructors integrate several or all of learning outcomes into the same assessment strategy. These strategies are most effective when they simulate real workplace tasks and projects. Examples of the holistic approach are provided in Appendix 7.

3. Developing Teaching and Assessment Strategies with the *MBECS*

Developing teaching and assessment strategies is not a linear process. As ideas are formulated for one learning outcome, they spark ideas related to another. It is a back-and-forth, creative process. Educators may wish to follow the steps as described or adapt them to better suit their situations.

1. Refer to program and course learning outcomes and determine whether teaching and assessment strategies will be at the coordinate, manage and/or direct levels.
2. Review the sections of the *MBECS* that relate to program and course outcomes.
3. Start to design teaching and formative assessment strategies. Reference back to the learning outcomes, in particular those at the course level, and think of ways to help learners achieve those outcomes.
4. Note whether the outcomes are knowledge-based (describe) or skills-based (develop, plan). This will help to identify the types of assessment and learning activities required.

5. Start sketching out ideas, describing what instructors will do to help learners acquire the required knowledge and abilities and, in turn, what learners will do to apply the knowledge and practice the abilities at the complexity level specified in the outcome. (Instructors may need to design more than one strategy per learning outcome to cover all the knowledge and abilities. Or they may be able to cover several learning outcomes with one strategy.)
6. Identify prior knowledge and abilities that learners will need to possess before starting to address these learning outcomes and note this under Foundation Knowledge. Add to the list during the development of strategies as other prior knowledge requirements become evident.
7. Identify criteria for successful completion of the teaching and formative assessment activities, i.e., what would serve as proof of learning? These criteria need to reflect the expectations of the learning outcomes and be observable and objective in nature. Criteria for successful performance of a task or sub-skill are specified under the relevant "common knowledge," "knowledge of" and "ability to" sections of the *MBECS*. Include the assessment criteria in the instructions to learners to ensure a transparent assessment process.
8. Consider when and how feedback will be provided to learners about how they can better meet the criteria. If the learners' results will be graded, their work should be scored using the same criteria provided in the activities instructions.
9. When all the course outcomes have been covered, review the draft teaching strategies to ensure they require learners to be active participants and that they accommodate a variety of learning preferences. Identify resources needed by instructors to convey information about knowledge and abilities and the resources needed by learners to note that information and apply and practice it.
10. Design summative assessment strategies that will provide information about the extent to which learners have achieved the course outcomes at selected milestones (mid-term, end-of-term). Refer back to all the course outcomes and the *MBECS* during the development of assessment tools to ensure they test knowledge and abilities at the same complexity level and in the same context as described in the learning outcomes.
11. Review the summative assessment strategies to ensure they test all the learning outcomes specified for that specific module or course.

4. Sample Teaching and Assessment Strategies

Sample teaching and assessment strategies were developed for two categories—B. Project Management and I. Site Management—using a template with the following elements of curriculum.

- Program outcomes at the coordinate and manage levels
- Course outcomes at the coordinate and manage levels
- Foundation knowledge (prior learning requirements)
- General notes about teaching and assessment strategies
- Summative assessment strategies
- Teaching and formative assessment strategies
- Resources (tools and equipment needed by instructors and students)

The summative assessment strategies used for both categories are holistic in nature. The development of a project plan for Category B and a case study assignment for Category I are effective accumulative methods to assess course outcomes. In other situations, multiple summative assessments may be needed to cover all course outcomes.

Most of the resources suggested for the teaching and assessment strategies are not provided in this guide. When they are included, it is noted in the tables. Although the sample strategies relate to a specific category, it's recommended that instructors look at where learning outcomes from various categories can be integrated or taught at the same time. For example, site management provides a good basis for learning aspects of project management.

An excerpt of the table for Category B follows below in Figure E1. See Appendix 7 for the complete samples of teaching and assessment strategies for both categories.

Figure E1 – Sample Teaching and Assesment Strategies for Category B: Project Management

The following provides excerpts. See full listing in Appendix 7.

Category B. Project Management		
	Coordinate Level	**Manage Level**
Program Outcomes	Programs that cover project management at the Coordinate level will provide graduates with knowledge and abilities that prepare them to: Provide input into and follow project plans for meeting or event; maintain flow of activities by ensuring key resources and personnel are in place.	Programs that cover project management at the Manage level will provide graduates with knowledge and abilities that prepare them to: Manage meeting or event to achieve mission, goals, objectives and quality standards within the constraints of the meeting's scope, time and budget.
Course Outcomes Note: Refer to details in the standards to inform instruction or assessment	Courses that cover project management at the Coordinate level will provide graduates with knowledge and abilities that prepare them to: 1. Provide input into project plans using their knowledge of the meeting and creativity for the manager's consideration. 2. Follow the project plans to ensure activities contribute to achieving the meeting's goals and quality standards. 3. Maintain the flow of activities during the meeting by following the agreed-upon plans.	Courses that cover project management at the Manage level will provide graduates with knowledge and abilities that prepare them to: 1. Develop a plan that will allow the project team to achieve the meeting's mission, goals and objectives. 2. Develop quality standards, policies and procedures to ensure the business event meets legal, regulatory, ethical and social requirements. 3. Develop a theme for the meeting that reflects stakeholders' expectations, branding and creativity.
Foundation Knowledge and Abilities Needed for this Topic	• Project management – theory and key steps in process; policies and procedures • Computer skills – Excel and other software programs • On-site communication – protocols, equipment options and their advantages and disadvantages	

Figure E1 – Sample Teaching and Assesment Strategies (continued) for Category B: Project Management

General Notes about Teaching and Assessment Strategies

See Meeting Complexity Variables and Scenario Templates" (found in Appendix 10) to design less complex strategies and resources for the Coordinate level and more complex strategies and resources for the Manage level.

Summative Assessment Strategies	Resources
Have learners complete a sample project plan for an association meeting event given background information including the meeting's profile and parameters. The knowledge and abilities tested should reflect whether the course outcomes are at the Coordinate or Manage level and at what breadth and depth the topics were covered. As an example, the learners could be asked to submit or present the following products as part of their project plan: • Meeting goals and objectives • Description of stakeholders, their requirements and involvement in the project management team • Meeting theme including rationale for selection of theme and how it ties to the event's goals and objectives • Sample critical path based on an 18-month planning cycle	To be provided to learner as part of the summative assessment: • Sample event profile and parameters along with criteria that will be used to evaluate the project plan .

Teaching and Formative Assessment Strategies	**Resources** (# in parentheses indicates relevant strategy)
Developing a project management plan (Skill 4) 1. Review what project management is, key steps in the process, and why it is important to an event's success. Provide a sample project management plan and have learners identify ways that the plan would help meeting professionals achieve the meeting's mission, goals, and objectives within the available timeframe and financial resources. Ask learners to identify the key areas where meeting professionals tasked with implementing a project plan could provide feedback to improve the project plan for next year's meeting. (Coordinate Level) 2. Using a sample project management plan, review the components of the plan and factors that were considered in its development, e.g., historical data, stakeholders, type of meeting, and external factors such as destination, legislation and labour. Refer learners to the document that describes the event phase and process loop system to illustrate the multiple elements involved in meeting planning and their interrelatedness. Provide learners with different components for a variety of meeting types and ask them to describe how each component would affect the rest of the project plan. (Manage Level)	Less complex sample project plan (1) More complex sample project plan (2) Event Phase & Process Loop System (2) (See Appendix 9) Description of different components from a variety of event types (2)

Figure E1 – Sample Teaching and Assesment Strategies (continued) for Category B: Project Management

Teaching and Formative Assessment Strategies cont'd	Resources
Executing the project management plan (Skill 5) 1) Refer back to the information presented in Strategy 5 above (within Skill 4) about the process of evaluating proposals, reporting, and developing rationale summaries. Provide a sample RFP and corresponding proposal and using a rating sheet they've developed, have the learners evaluate the proposal. (Coordinate Level) 2) Display and review a list of types of contracts commonly required for meeting events, e.g., venue, food & beverage, audio-visual, speakers, entertainers. Lead a discussion about negotiation, what is appropriate to negotiate (e.g., hotel rates), and what is not appropriate to negotiate (e.g., gratuities). Provide information about the negotiation processes and techniques. Break learners into groups of two to play the role of event professional and supplier. Have the pairs present the results of their negotiation role-playing and from there, create a document that describes recommendations for negotiating event contracts. (Manage Level)	Sample RFP and sample proposal (1) List of types of contracts (2) Negotiation role play description (2)

5. Meeting Complexity Variables and Scenario Templates

A sample scenario that uses the variables of complexity (see section C4 or Appendix 10) to create a meeting and event scenario is provided below. Four complete scenarios using this format are provided in Appendix 10. Educators can adapt the scenarios to the learning outcomes of their programs to be used for teaching and assessment strategies. For example, the last and most complex scenario could be made more complex by changing its scope to international. One or two characteristics are offered for each variable in these scenarios, but these characteristics are not exhaustive and can be supplemented to develop more comprehensive and descriptive scenarios.

Scenario 1

Profile. A small corporation or association holds an annual board meeting in its home-office region to review year-end statistics and gain consensus on the strategy for next year. Most attendees know one another.

- Type of Host Organization: Corporate or association
- Culture: meetings are casual, but members are there to do business.
- Goals: To review year-end statistics and gain consensus on strategy for next year
- Relationship to Other Business Plans: Association board may need to rationalize meeting costs within annual budget. Meeting results affect the association's operating plan for next two years.
- Attendee Profile: ages range from 35 to 55 years, 75 percent male and 25 percent female
- Scope: Local
- First Time or Repeat: Repeat
- Size and Location: 50 people, home-office location with one traditional venue required
- Financial Parameters: All costs paid by the association or corporation, no funding or registration fees required

Planning Details.

- One-day annual general meeting (AGM) of a small corporation or association with 50 people
- Traditional venue (hotel, conference center)
- Registration desk requires name badges only (attendees are pre-determined), check-in only, no registration fees
- Basic set-up requirements (rounds of eight)
- Basic audiovisual requirements including lectern mic, lavaliere mics, front projection and tripod screen
- All presenters are internal (affiliated with the corporation or association)
- Food & beverage needs include one stand-up continental breakfast, one morning break (basic beverage service plus fruit and yogurt), one sit-down luncheon (basic plated meal selected from standard venue menu) and one afternoon break (basic beverage service plus cookies)
- No dietary restrictions or cultural considerations for food & beverage

1. Program Review Levels

As part of the quality assurance cycle, educators review their programs on a regular cycle to ensure it is current and meets institutional, departmental and program standards. In order to be industry responsive and able to say to employers that a program meets industry needs, educators can reference programs in terms of industry professional standards, such as the *MBECS*.

There are three levels at which programs can be reviewed and compared to industry standards. These are similar to considerations in program development (see Section C), and include the following.

1. Benchmarking against the breadth of knowledge and skills identified in competency standards. With the *MBECS*, this means checking to see if all the identified categories (strategic planning, project management) and skills are included.
2. Benchmarking against the depth of knowledge within each skill area. For the *MBECS*, this means referencing against the sub-skills in each category of the standards. (See Figure F1 for a sample checklist for comparing current program content to the breadth and depth of the *MBECS*. The full checklist can be found in Appendix 8A.)
3. Benchmarking against the complexity level of learning required for each sub-skill as identified for each industry role/responsibility level. This translates into the curriculum requirements for Coordinate, Manage and Direct levels. This level provides the most accurate and detailed level of referencing against the professional competencies required in the field of meetings and business events. (See Appendix 8B for this checklist.)

2. Reviewing Depth and Breadth of the *MBECS* in a Program

The following checklist provides a detailed listing of topics to benchmark the breadth and depth of content areas. It is used in reference to topic areas only, not to the complexity level of learning required at each of the three curriculum exit levels. Coordinate-level programs will have learning outcomes at lower levels of complexity for most skills than what is listed here. See Appendix 2 to identify exit-level benchmarks and complexity of learning. Programs may not wish to incorporate all the skill areas or sub-skills of the *MBECS*, depending on their focus.

Figure F1 Sample Checklist for reviewing breadth and depth of *MBECS* in curriculum

If you are unsure of what is intended in a standard subskill statement, check the *MBECS* document for details

Category	Skill (breadth)	Sub-skills (depth)	We include the topic	We don't include the topic	Include in next revision
A. STRATEGIC PLANNING	1. Manage Strategic Plan for Meeting or Event	1.01 Develop mission goals & objectives			
		1.02 Determine feasibility of meeting or event			
		1.03 Determine requirements to carry out meeting/ event			
		1.04 Develop financial summary			
		1.05 Monitor strategic plan			
	2. Develop Sustainability Plan for Meeting or Event	2.01 Implement sustainability management plan			
		2.02 Demonstrate environmental responsibility			
	3. Measure Value of Meetings and Business Events	3.01 Develop evaluation plan			
		3.02 Measure return on investment			
		3.03 Evaluate/audit meeting or event			
		3.04 Evaluate effectiveness of risk management plan			
B. PROJECT MANAGEMENT	4. Plan Meeting or Event	4.01 Develop project plan			
		4.02 Develop quality standards, policies, procedures			
		4.03 Develop theme for event			
		4.04 Develop procurement plan			
		4.05 Establish milestones and critical path			
		4.06 Develop integrated communication plan			
		4.07 Develop evaluation/audit procedures			
	5. Manage Meeting or Event Project	5.01 Manage critical path			
		5.02 Manage contracts			
		5.03 Manage running of meeting or event			
Other categories would be added (see Appendix 8A)					
SUMMARY					
Subskills included in our curriculum					
Additional subskill areas to incorporate in program revision					

3. Reviewing the Complexity Level of Program Content.

The Appendix 8B checklist can be used for comparing the breadth, depth and complexity of the skills and abilities students should be able to demonstrate on successful completion of a program, against the competency (complexity) level expected of an experienced meeting professional as described in the *MBECS*. It is not expected that program graduates in undergraduate programs will meet the performance level identified in the *MBECS* in most sub-skills, as they will need workplace experience to become a professional capable of making decisions and choices in complex, unpredictable situations. More than 50 percent of the sub-skills in the *MBECS* require 5 years or more of experience to master. Academic programs, however, can benchmark themselves against industry standards so that their students can enter the workplace with the required knowledge and some skill/ability levels.

In Section C, it was noted that a group of faculty subject matter experts has rated each of the sub-skills by identifying a level of difficulty of learning in the Knowledge (K) and Abilities (Performance) domains according to a revised Blooms' taxonomy. These ratings were on a one-to-six scale, six being highest. To relate these to applicable curriculum completion levels, the group used the following formula of knowledge ratings as a general parameter.

- Coordinate exit level (curriculum content completion): K1 and K2, consideration of K3
- Manage exit level: Up to K4, consideration of K5.

For sub-skills rated at a K5 or K6 and identified at a direct level of curriculum, educators need to include these in programs at the coordinate and manage level, but at lower levels of difficulty or complexity.

There are two parts needed to benchmark programs against the complexity level in the *MBECS*.

a. Compare curriculum level requirements at the exit level of your program with the *MBECS* curriculum levels (coordinate, manage, direct) to see if you have covered the skills and sub-skills at the identified knowledge level

b. Compare the ability/performance level of program/course outcomes against the identified performance ratings.

A review against the *MBECS* provides the ratings for benchmarking against other academic programs and against industry professional certification requirements.

1. Introduction

In the meeting and business event profession, individuals can progress in role and responsibilities as they increase their knowledge and abilities. Broad roles and responsibilities are based on three progressive workplace roles: to coordinate, manage and eventually direct meetings and business events. Descriptors for these three progressive role categories are outlined below.

Coordinate.

Individuals at this responsibility level assist a meeting manager and are responsible for coordinating and implementing detailed meeting plans including registration, recruitment, training and supervision of volunteers and support staff, plus assisting with reports and meeting evaluation. They must work independently in areas of their responsibility and under the direction of a manager for all other responsibilities. They often gain broad exposure to the meeting industry in this role.

Manage.

Individuals at the manage level are responsible for planning and managing meetings to achieve the goals and objectives of a strategic plan through program design, event implementation and management. They monitor and evaluate meeting outcomes, and train and manage staff. They have considerable autonomy and responsibility for other staff. Where there is a position of director in the organization, they take high-level direction from that individual.

Direct.

Individuals at the direct level may have roles and responsibilities as part of an executive team and be responsible for connecting meeting and business event strategies to overall organizational strategies and business plans. Their location in the organization depends on the size of the organization and the number and complexity of meetings held. They work with other departments when applicable, and plan meetings based on research about, knowledge of and involvement in the broader industry. At the direct level they develop, manage and evaluate strategic objectives and financial plans and results and have responsibility for stakeholder, sponsor and funder relationships. They oversee all related staff members on the meeting management team.

2. Titles and Variations in Workplace Roles and Responsibilities

Meeting and business event professionals work for many different types of organizations, including associations, professional organizations and corporations. Their roles and positioning vary according to organizational structure. For example, a corporate planner may be positioned within a specific department and may work directly with individuals in other departments for specialized tasks such as creative development, logistics, marketing, budget and finance. An association planner may have a smaller or greater number of responsibilities for meetings depending on the size of the organization and number of meetings staff members. Independent planners may specialize in a particular type of clientele, or may serve a variety of corporations, associations, nonprofit organizations and governments.

Job titles do not always reflect the level of responsibility expected. Similar titles may have job roles and responsibilities that vary widely depending on a number of factors. The following is a list of job titles that may be used at the various levels of responsibility. However, job titles do not necessarily reflect responsibilities in an accurate manner. Job descriptions provide more accurate information in this regard.

Coordinate

- Meeting Administrator
- Event Coordinator
- Meeting Coordinator
- Event Planner - Administrative Assistant
- Junior Event Planner
- Junior Conference Planner
- Corporate Events Administrator
- Production Coordinator
- Education Coordinator
- Association Meeting Coordinator
- Corporate Meeting Coordinator
- Meeting Planning Assistant
- Program Coordinator
- Executive Assistant

Manage

- Conference Services Supervisor
- Trade Show Planner
- Events Specialist
- Junior Corporate Event Planner
- Association Meeting Planner
- Corporate Meeting Planner
- Association Meeting Manager
- Corporate Meeting Manager
- Independent Meeting Planner
- Meeting & Event Planner
- Event Planner
- Meeting Associate
- Meeting Planning Associate
- Meeting Planner
- Meeting Manager

Direct

- Senior Event Advisor
- Senior Program Manager
- Senior Event Manager
- Meeting Professional
- Trade Show & Sponsorship Manager
- Director, Corporate Meetings & Incentives
- Senior Corporate Event Planner
- Director of Development
- Corporate Director of Meetings
- Corporate Senior Meeting Planner
- Association Director of Meetings
- Corporate Director of Meetings
- Director of Events
- Senior Meeting & Event Planner
- Senior Meeting Planning Associate
- Senior Meeting Planner
- Director of Meetings

—See Appendix 11 for sample job descriptions

3. Specialty Areas

As in other professions, there are specialty areas within the meeting and business event field. Meeting organizers may gain additional competencies and specialize in areas such as trade shows, exhibitions, fairs, incentive meetings, corporate meetings or sector-specific conferences or meetings. The foundation competencies for all these specializations, however, are found in the *MBECS*.

4. Industry Certification and Designations

There are a number of certifications available in the field, some for more specialized areas such as exhibitions. The most recognized meeting management certifications are the following.

- Certified Event Management Professional (CEMP), awarded by the Canadian Tourism Human Resource Council and based on the Events Management International Competency Standards from which the *MBECS* was developed. (http://emerit.ca/en/emerit_certification)
- Certificate in Meeting Management, awarded by Meeting Professionals International (http://www.mpiweb.org/education/cmm)
- Certified Meeting Professional (CMP), awarded by the Convention Industry Council (www.mpiweb.org/Education/Certifications/CMP)
- Tourism Certified Professional (TCP), Events Coordinator, emerit certification awarded by the Canadian Tourism Human Resource Council (http://emerit.ca/en/emerit_certification)

5. Related Career Options

Individuals with proven competency in meeting coordination and management are sought after in many related job fields in such as food and beverage or hotel sales departments, which require a solid foundation in meeting organization. See Appendix 12 for an example of how one educational institution (Indiana University) demonstrates the connectivity and career options among related fields through a career tree diagram.

There are many resources available to help educators with curriculum development. Here are some resources that provide additional background and teaching aids related to meetings, events and the broader tourism industry.

1. Meeting and Event Resources

- Meeting Professionals International (MPI) at **www.mpiweb.org/portal/research** (you may need to sign up and log in for some information). This site provides resources on research areas such as measuring the business value of meetings, corporate social responsibility, future of meetings, strategic meetings management and virtual and hybrid events.
- Professional Convention Management Association (PCMA) at **www.pcma.org/Resources**. This site provides resources that can be used to inform curriculum and lesson plans, and for setting up scenarios and assignments in four sections—industry and meeting management resources, planning tools and research.
- Textbooks.
  - o *Art of the Event: Complete Guide to Designing and Decorating Special Events*. James C. Monroe and Robert A. Kates
  - o *The Art of the Show*. Sandra L. Morrow
  - o *CIC Manual*. Convention Industry Council
  - o *The Complete Idiot's Guide to Trade Show*s. Linda Musgrove
  - o *Event and Destination Management*. Meeting Conference Association. Ratandeep Singh.
  - o *Events Design and Experience*. Graham Berridge.
  - o *Event Entertainment and Production*. Mark Sonder
  - o *Event Marketing*. Leonard H. Hoyle.
  - o Event Planning. Judy Allen.
  - o *Fundamentals of Destination Management And Marketing*. Rich Harrill.
  - o *The Guide to Successful Destination Management*. Pat Schaumann.
  - o *Hospitality Financial Accounting*. Jerry J. Weygandt, Donald E. Kieso, Paul D. Kimmel and Agnes L. DeFranco.
  - o *Hospitality Law: Managing Legal Issues in the Hospitality Industry*. Stephen C. Barth and David K. Hayes.
  - o *Meetings, Expositions, Events and Conventions: An Introduction to the Industry*. George G. Fenich.
  - o *MPI's Planning Guide: A Source for Meetings and Conventions. Meeting Professionals International. Don* McLaurin, Ted Wykes and Sandy Biback.
  - o A *Practical Guide to Destination Management*. World Tourism Organization (UNWTO).
  - o *Professional Event Coordination*. Julia Rutherford Silvers.
  - o *Professional Meeting Management*. Professional Convention Management Association. Glen Ramsborg, PhD (ed.).
  - o *Special Event Production: The Process*. Doug Matthews.
  - o *Trade Show Management*. Manfred Kirchgeorg, Werner M. Dornscheidt, Wilhelm Giese and Norbert Stoeck (eds.).
- Course Syllabi (see Appendix 6 for some sample syllabi in a range of formats).
- International EMBOK and related items at www.embok.org. The EMBOK is a three dimensional description of the knowledge and skills essential to create, develop and deliver an event. (Also, see Appendix 9 for an "Event Phase & Process Loop System" resource for progressive and connected phases of events).

2. Learning and Assessment Development Resources

Many educational institutions have handbooks or other aids to assist their faculties in developing learning outcomes. As well, most private trainers use a form of Bloom's Taxonomy for their curriculum development and assessment. Here are a few links you may wish to reference.

- Bridgewater State College. Assessment Guidebook 2nd Edition at **www.bridgew.edu/assessmentguidebook.**
- British Columbia Institute of Technology. Writing Learning Outcomes at **www.bcit.ca/ltc/curriculum/courses**.
- Red River Community College. Learning Outcomes Support Web Site at **https://me.rrc.mb.ca/LearningOutcomeSupport**.
- UCE Birmingham. Guide to Learning Outcomes at **www.ssdd.bcu.ac.uk/outcomes**.
- Clark, D. R. (2004). Bloom's Taxonomy of Learning Domains. Retrieved Feb 10, 2012, at **http://nwlink.com/~donclark/leader/leader.html http://www.nwlink.com/~donclark/hrd/bloom.html**.

3. Source Documents

The authors recognize the following source documents used in the development of this guide.

The Alliance of Sector Councils (TASC). *Setting the Standard: Accepted Principles and Recommended Practices for National Occupational Standards, Certification Programs, and Accreditation Programs.*

Anderson, Lorin W. and David R. Krathwohl. *A Taxonomy for Learning, Teaching and Assessing: A Revision of Bloom's Taxonomy of Educational Objectives.* Addison, Wesley Longman, Inc., 2001.

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Mager, Robert F. and Kenneth M. Breach, Jr. *Developing Vocational Instruction.* David S. Lake Publishers,1967.

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South African Qualifications Authority. *Developing Learning Programmes: A Step-by-Step Guide.* Part 2. 2005.

4. Guide Appendices

Appendix 1.
Glossary

Appendix 2.
Standards Rating and Curriculum Levels Chart

Appendix 3.
Checklist for Inclusion of *MBECS* in Curriculum

Appendix 4.
Sample Learning Outcomes

Appendix 5.
Curriculum Level-Descriptors for Learning Outcomes

Appendix 6.
Sample Syllabi

Appendix 7.
Sample Teaching and Assessment Strategies

Appendix 8A.
Checklist for Reviewing Breadth and Depth of *MBECS* in Curriculum

Appendix 8B.
Checklist for Reviewing Complexity of Learning of *MBECS* in Curriculum

Appendix 9.
Event Phases & Process Loop System

Appendix 10.
Meeting Complexity Variables and Scenario Templates

Appendix 11.
Sample Job Descriptions

Appendix 12.
TCEM Career Tree (Connectivity and Career Options Between Fields)

These terms are defined to suit the context and purpose of the Meeting and Business Events Competency Standards (*MBECS*) Curriculum Guide.

Abilities	• Refers to individuals' capacity to apply and demonstrate knowledge, skills and attitudes in a holistic fashion, that is, combining them to carry out job responsibilities
Accreditation (of educational programs)	• The process of quality assurance through which one gains a time-limited accredited status that communicates formal recognition of a program that meets a set of designated criteria; granted to an educational or training course or program by the responsible accreditation body
Active learning	• Learners engage by taking responsibility for their own learning and participating in activities that require application of knowledge and abilities, the opposite of which is passive learning
Articulation	• The process of comparing the content of courses for transfers between postsecondary institutions
Assessment strategies	• Methods used by educators to determine the extent to which learners are progressing toward or have achieved learning outcomes • Formative assessments are used throughout a learning experience, giving educators an opportunity to monitor learner progress and provide feedback; considered assessment for learning • Summative assessments give educators an opportunity to determine the extent to which learners have achieved the learning outcomes at key stages, including the end of a learning experience; considered assessment of learning
Bloom's taxonomy	• A framework to classify forms and levels of learning that lie along a continuum of complexity in three domains: cognitive (knowledge), psychomotor (skills) and affective (attitude) • An adapted version of Bloom's taxonomy was used to establish knowledge and performance levels for each sub-skill in the *MBECS* (see Comparative Review of the Occupational Standards and Certification Programs in the Resources List)
Certified Meeting Professional (CMP) Program	• Purpose is to increase proficiency of meeting professionals • Requirements include professional experience, continuing education and successful completion of a written examination (www.conventionindustry.org/CMP/CMPProgram.aspx)
CIC	• See Convention Industry Council
CMP	• See Certified Meeting Professional Program

Competence	• Competence in professional practice is much more than the accomplishment of a number of discrete and separate tasks; it's a complex interaction and integration of knowledge, judgment, higher order reasoning, personal qualities, skills, values and beliefs • A competent professional has the knowledge, skills and attitudes necessary for job performance which meet professional, legal and community expectations of competent performance at a specified level
Competencies	• Abilities required to competently perform job responsibilities
Competency standards	• Abilities required to competently perform job responsibilities
Convention Industry Council (CIC)	• Professional association whose mission is to provide a forum for member organizations to exchange information on global trends and topics; promote excellence in best practices and guidelines; collaborate on industry issues; and advocate the value of the meetings, conventions, exhibitions and events industry (**www.conventionindustry.org/CICMembers/OverviewMission.aspx**) • Awarding (or sponsoring) body for CMP designation
Curriculum	• A normative document (or a collection of documents) setting the framework for planning learning experiences; depending on the country, the type of education and training and the institution, curriculum may define learning outcomes, objectives, contents, place and duration of learning and teaching and assessment methods. (Source: *Research Paper No. 6, Learning Outcomes approaches in VET curricula: A Comparative Analysis of nine European countries by the European Centre for the Development of Vocational Training. Publications Office of the European Union, 2010, Luxembourg*)
Curriculum levels or exit points	• Progressive levels of learning created to promote consistency and transferability between programs and educational institutions • The exit benchmarks used for *MBECS* reflect three progressive levels for program delivery related to three corresponding levels of workplace responsibility (coordinate, manage and direct)
Domain	• Describes the scope of competency standards • Can be an industry or field, a function or area of responsibility, an occupation or a job • In the case of the *MBECS*, the domain is the field of meeting and business event management
Formative assessment	• See "assessment strategies"

Learning outcomes	• Statements that describe the knowledge, skills and abilities that learners should be able to demonstrate at the end of a learning experience • Created at different levels of specificity; program outcomes are more general than course outcomes • Described as outputs (what program graduates will be able to do) rather than inputs (what instructors will do to help learners achieve the goals) • Often informed by competency standards and local needs assessment
Level descriptors	• Provide a broad indication of learning achievements that are appropriate to a qualification at a specific level
The *MBECS*	• See *Meeting and Business Event Competency Standards*
***Meeting and Business Event Competency Standards* (*The MBECS*)**	• A comprehensive description of the knowledge and abilities that experienced meeting and business event professionals should possess and demonstrate • See also "competency standards"
Meeting or event profile	• Written report outlining statistics of previous events, anticipated use of all services, profile of attendees, hotel occupancy patterns, etc. (from APEX Industry Glossary)
Occupation	• A grouping of jobs that have the same basic duties • Not employer-specific; found across organizations and industries (accountant, trainer) • People in an occupation may have similar competencies and responsibilities but have different job titles • The *MBECS* apply to multiple occupations that work in multiple types of organizations (independent operators and large corporations, for-profit and not-for profit corporations, associations and different levels of government)
Program outcomes	• A type of learning outcome • General statements that describe the purpose and goals of an education program such as a diploma or bachelors degree

Qualification	• Can be issued by academic or industry body • An *academic* qualification is formal recognition of individual successful assessment against a combined set of learning outcomes that is recognized by an authority within a country that has met that country's requirements in terms of being recognized as a qualification • An *industry* qualification is formal recognition of successful completion of a voluntary recognized professional industry certification process
Recognition of prior learning	• Assessing and recognizing competence on the basis of evidence presented; learning outcomes and assessment criteria indicate what the learner has to provide evidence of to attain recognition (for course, module or qualification)
Summative assessment	• See "assessment strategies"
Teaching strategies	• Methods and resources that instructors use to help learners achieve learning outcomes

Formulas

1. The benchmark for undergraduate programs (professionals with knowledge base, but who need additional industry experience to meet standards level in performance).

- Coordinate level programs cover all sub-skills rated at K=2 and some K=3 (total 17 sub-skills), plus lower level outcomes for all other sub-skills (105 sub-skills). Performance (competency) level of outcomes will vary by program.
- Manage level programs cover all sub-skills rated up to K=4, and some K=5 (total 85 sub-skills), plus lower level outcomes for all other sub-skills (37 sub-skills). Performance (competency) level of outcomes will vary by program.

2. Professional development beyond undergraduate level (direct level).

- All K=6 sub-skills (32) and some K=5 sub-skills (5) would not be completed until this level.

Note: These skills may have foundational level learning in undergraduate programs, but graduates of undergrad programs would not be at the *MBECS* level of mastery in K or P.

K1 = Remember
K2 = Understand
K3 = Apply
K4 = Analyze
K5 = Evaluate
K6 = Create

P3 = Basic proficiency
P4 = Expert proficiency
P5 = Adaptable proficiency
P6 = Creative proficiency

Based on the above formulas, the benchmarks for curriculum exit levels are as follows.

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
A. STRATEGIC PLANNING								
1. Manage Strategic Plan for Meeting or Event	8 yrs	0	5					
1.01 Develop mission goals & objectives				6	6			
1.02 Determine feasibility of meeting or event				5	3			
1.03 Determine requirements to carry out meeting/event				5	3			
1.04 Develop financial summary				3	4			
1.05 Monitor strategic plan				5	4			
2. Develop Sustainability Plan for Meeting or Event	5 yrs	PP	4					
2.01 Implement sustainability management plan				6	6			
2.02 Demonstrate environmental responsibility				6	4			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
3. Measure Value of Meetings and Business Events	8 yrs	RR	5					
3.01 Develop evaluation plan				6	6			
3.02 Measure return on investment				4	5			
3.03 Evaluate/audit meeting or event				5	4			
3.04 Evaluate effectiveness of risk management plan				5	4			
B. PROJECT MANAGEMENT								
4. Plan Meeting or Event	3 yrs	Daily	5					
4.01 Develop project plan				6	4			
4.02 Develop quality standards, policies, procedures				6	4			
4.03 Develop theme for event				6	4			
4.04 Develop procurement plan				6	3			
4.05 Establish milestones and critical path				6	4			
4.06 Develop integrated communication plan				6	4			
4.07 Develop evaluation/audit procedures				6	4			
5. Manage Meeting or Event Project	5 yrs	Daily	5					
5.01 Manage critical path				5	4			
5.02 Manage contracts				5	4			
5.03 Manage running of meeting or event				3	4			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
C. RISK MANAGEMENT								
6. Manage Risk Management Plan	8 yrs	RR	5					
6.01 Identify risks				3	4			
6.02 Analyze risks				5	4			
6.03 Develop management and implementation plan				6	5			
6.04 Develop and implement emergency response plan				6	5			
6.05 Arrange security				3	3			
D. FINANCIAL MANAGEMENT								
7. Develop Financial Resources	5 yrs	RR	5					
7.01 Manage sponsorship process				5/6	5			
7.02 Manage donor process				6	4			
7.03 Manage program funding process				5/6	6			
7.04 Manage registration process				4	4			
8. Manage Budget	3 yrs	RR	5					
8.01 Develop budget				4	4			
8.02 Establish pricing				6	4			
8.03 Establish financial controls and procedures				4	4			
8.04 Manage cash flow				4	3			
8.05 Monitor budget performance				4	3			
8.06 Revise budget				4	4			
9. Manage Monetary Transactions	1 yr	RR	3					
9.01 Establish cash handing procedures				3	3			
9.02 Monitor cash handling procedures				3	3			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
E ADMINISTRATION								
10. Perform Administrative Tasks		Daily	3					
10.01 Coordinate office administration				4	4			
10.02 Manage information system				5	4			
10.03 Write reports				5	4			
F. HUMAN RESOURCES								
11. Manage Human Resource Plan	5 yrs	RR	5					
11.01 Determine workforce requirements				5	5			
11.02 Establish workforce policies and procedures				6	4			
11.03 Develop training plan				6	4			
11.04 Monitor human resources plan				5	3			
12. Acquire Staff and Volunteers	3 yrs	O	4					
12.01 Develop selection criteria				6	4			
12.02 Recruit staff and volunteers				5	4			
12.03 Interview candidates				3	4			
12.04 Select best candidate and offer position				5	4			
13. Train Staff and Volunteers	3 yrs	O	4					
13.01 Provide orientation				2/3	3			
13.02 Provide training				5	3			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
14. Manage Workforce Relations	10 yrs	Daily	5					
14.01 Supervise staff and volunteers				5	5			
14.02 Motivate staff and volunteers				5	5			
14.03 Manage teams				6	5			
14.04 Evaluate staff				5	4			
14.05 Process terminations and resignations				4	3			
G. STAKEHOLDER MANAGEMENT								
15. Manage Stakeholder Relationships	7 yrs	RR	5					
15.01 Identify stakeholders				2	3			
15.02 Assess stakeholders				4	4			
15.03 Classify stakeholders				4	4			
15.04 Manage stakeholder activities				3	5			
15.05 Manage stakeholder relationship				5	5/6			
H. MEETING OR EVENT DESIGN								
16. Design Program	5 yrs	RR	5					
16.01 Determine program components				4	6			
16.02 Select program content and delivery formats				6	6			
16.03 Structure and sequence program components				4	5			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
17. Engage Speakers and Performers	2 yrs	O	3					
17.01 Determine event requirements for speakers and performers				5	3			
17.02 Develop selection criteria				5	3			
17.03 Select candidates				3	3			
17.04 Secure contracts and communicate expectations				5	4			
18. Coordinate Food and Beverage Services	3 yrs	RR	5					
18.01 Determine food & beverage service requirements				5	4			
18.02 Select menu(s)				3	3			
18.03 Plan service style(s)				2	3			
18.04 Select food and beverage provider(s)				3	3			
18.05 Manage alcohol service				3	4			
19. Design Environment	5 yrs	PP	4					
19.01 Establish functional requirements				6	6			
19.02 Select decor and furnishings				4	3			
19.03 Coordinate meeting or event signage				2	3			
20. Manage Technical Production	5 yrs	PP	4					
20.01 Determine requirements for staging and technical equipment				5	4			
20.02 Acquire staging and technical equipment				3	3			
20.03 Install staging and technical equipment				3	3			
20.04 Oversee technical production operation				3	3			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
21. Develop Plan for Managing Movement of Attendees	3 yrs	RR	4					
21.01 Develop admittance credential systems				5	3			
21.02 Select crowd management techniques				5	4			
21.03 Coordinate accommodation and transportation				3	3			
21.04 Manage protocol requirements				2	3			
I. SITE MANAGEMENT								
22. Select Site	3 yrs	RR	5					
22.01 Determine site specifications				3	3			
22.02 Identify and inspect sites				5	3			
23. Design Site Layout	3 yrs	PP	5					
23.01 Design site layout				3	5			
24. Manage Meeting or Event Site	6 yrs	RR	5					
24.01 Create logistics action plan for set-up & take-down				5	3			
24.02 Set up site				3	3			
24.03 Monitor site during meeting or event				3	3			
24.04 Take down site				3	3			
25. Manage On-site Communication	3 yrs	PP	5					
25.01 Establish communications framework				3	4			
25.02 Determine & acquire required communication equipment				3	3			
25.03 Specify communication procedures and protocols				3	3			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
J. MARKETING								
26. Manage Marketing Plan	7 yrs	RR	5					
26.01 Conduct situational analysis				6	5			
26.02 Define target market segments				5	4			
26.03 Develop branding for meeting or event				6	4			
26.04 Select marketing distribution channels				5	3			
26.05 Develop integrated marketing strategy				6	6			
26.06 Implement marketing plan				4	4			
27. Manage Marketing Material	3 yrs	RR	3					
27.01 Determine marketing materials needed for event				3	4			
27.02 Develop content and design parameters				6	4			
27.03 Produce marketing materials				3	3			
27.04 Distribute marketing materials				2	3			
28. Manage Meeting or Event Merchandise	2 yrs	O	2					
28.01 Develop product(s) design and specifications				6	4			
28.02 Determine pricing				4	4			
28.03 Control brand integrity				5	4			
28.04 Produce merchandise				3	3			
28.05 Distribute merchandise				2	3			
28.06 Coordinate hospitality				3	3			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
29. Promote Meeting or Event	5 yrs	PP	5					
29.01 Develop advertising plan				6	4			
29.02 Develop cross-promotional activities				6	4			
29.03 Develop contests				4	4			
29.04 Coordinate sale promotion				3	4			
30. Contribute to Public Relations Activities	5 yrs	PP	4					
30.01 Contribute to public relations strategy				6	4			
30.02 Contribute to publicity plan				3	4			
30.03 Develop media relations				5	5			
30.04 Contribute to implementation of publicity plan				4	4/5			
30.05 Manage crises and controversies				6	6			
31. Manage Sales Activities	7 yrs	RR	5					
31.01 Develop sales plan and objectives				5	4			
31.02 Conduct sales activities				3	5			
31.03 Determine sales platforms				3	5			

Frequency Ratings:
O = occasionally;
PP = per project;
RR = routinely/regularly

Importance Ratings:
1-5, 5 being highest

For ratings analysis see end of document

	Context Rating			Blooms Taxonomy		Academic Level		
	TIME	FREQUENCY	IMPORTANCE	KNOWLEDGE	PERFORMANCE	1 Coordinate	2 Manage	3 Direct (post-grad)
K. PROFESSIONALISM								
32. Exhibit Professional Behavior	NA	NA	NA					
32.01 Project a professional image						Interwoven throughout programs		
32.02 Demonstrate leadership								
32.03 Demonstrate ethical behaviour								
32.04 Work with colleagues								
32.05 Work in a diverse environment								
32.06 Manage time								
32.07 Manage stress								
32.08 Make decisions								
32.09 Solve problems								
32.10 Keep up to date w/ changes in meetings/event industry								
32.11 Facilitate continuous improvement								
32.12 Participate in professional development activities								
L. COMMUNICATION								
33. Conduct Business Communications								
33.01 Communicate verbally								
33.02 Communicate in writing								
33.03 Use communication tools								
33.04 Make effective presentations								
33.05 Plan and conduct meetings								
33.06 Establish and conduct business relationships								

Analysis: (33 skills)

Time to Master	No. Skills
1 year	1
2 years	2
3 years	10
4 years	-
5-10 years	17
N/A	3

Category	No. Skills	No. Sub-skills	K=6	K=5	K=4	K=3	K=2	Exit at Coordinate	Exit at Manage	Exit at Direct
A. Strategic Planning	3	11	4	5	1	1		1	3	7
B. Project Management	2	10	7	2		1			3	7
C. Risk Management	1	5	2	1		2		1	1	3
D. Financial Management	3	12	4		6	2		2	6	4
E. Administration	1	3		2	1				3	
F. Human Resources	4	15	4	8	1	2		1	10	4
G. Stakeholder Management	1	5		1	2	1	1	1	3	1
H. Meeting/Event Design	6	23	2	7	3	8	3	3	18	2
I. Site Mngmt.	4	10		2		8		4	6	
J. Marketing	6	28	9	5	4	8	2	4	15	9
Totals	**31**	**122**	**32**	**33**	**18**	**33**	**6**	**17**	**68**	**37**
Professionalism & Communications not rated.										

** Ratings at x.5 rounded up*

If you are unsure of what is intended in a standard sub-skill statement, check the *MBECS* document for details.

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Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
A. STRATEGIC PLANNING	1. Manage Strategic Plan for Meeting or Event	1.01 Develop mission goals & objectives			
		1.02 Determine feasibility of meeting or event			
		1.03 Determine requirements to carry out meeting/ event			
		1.04 Develop financial summary			
		1.05 Monitor strategic plan			
	2. Develop Sustainability Plan for Meeting or Event	2.01 Implement sustainability management plan			
		2.02 Demonstrate environmental responsibility			
	3. Measure Value of Meetings and Business Events	3.01 Develop evaluation plan			
		3.02 Measure return on investment			
		3.03 Evaluate/audit meeting or event			
		3.04 Evaluate effectiveness of risk management plan			
B. PROJECT MANAGEMENT	4. Plan Meeting or Event	4.01 Develop project plan			
		4.02 Develop quality standards, policies, procedures			
		4.03 Develop theme for event			
		4.04 Develop procurement plan			
		4.05 Establish milestones and critical path			
		4.06 Develop integrated communication plan			
		4.07 Develop evaluation/audit procedures			
	5. Manage Meeting or Event Project	5.01 Manage critical path			
		5.02 Manage contracts			
		5.03 Manage running of meeting or event			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
C. RISK MANAGEMENT	6. Manage Risk Management Plan	6.01 Identify risks			
		6.02 Analyze risks			
		6.03 Develop management and implementation plan			
		6.04 Develop and implement emergency response plan			
		6.05 Arrange security			
D. FINANCIAL MANAGEMENT	7. Develop Financial Resources	7.01 Manage sponsorship process			
		7.02 Manage donor process			
		7.03 Manage program funding process			
		7.04 Manage registration process			
	8. Manage budget	8.01 Develop budget			
		8.02 Establish pricing			
		8.03 Establish financial controls and procedures			
		8.04 Manage cash flow			
		8.05 Monitor budget performance			
		8.06 Revise budget			
	9. Manage Monetary Transactions	9.01 Establish cash handing procedures			
		9.02 Monitor cash handling procedures			
E. ADMINISTRATION	10. Perform Administrative Tasks	10.01 Coordinate office administration			
		10.02 Manage information system			
		10.03 Write reports			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
F. HUMAN RESOURCES	11. Manage Human Resource Plan	11.01 Determine workforce requirements			
		11.02 Establish workforce policies and procedures			
		11.03 Develop training plan			
		11.04 Monitor human resources plan			
	12. Acquire Staff and Volunteers	12.01 Develop selection criteria			
		12.02 Recruit staff and volunteers			
		12.03 Interview candidates			
		12.04 Select best candidate and offer position			
	13. Train Staff and Volunteers	13.01 Provide orientation			
		13.02 Provide training			
	14. Manage Workforce Relations	14.01 Supervise staff and volunteers			
		14.02 Motivate staff and volunteers			
		14.03 Manage teams			
		14.04 Evaluate staff			
		14.05 Process terminations and resignations			
G. STAKEHOLDER MANAGEMENT	15. Manage Stakeholder Relationships	15.01 Identify stakeholders			
		15.02 Assess stakeholders			
		15.03 Classify stakeholders			
		15.04 Manage stakeholder activities			
		15.05 Manage stakeholder relationship			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
H. MEETING OR EVENT DESIGN	16. Design Program	16.01 Determine program components			
		16.02 Select program content and delivery formats			
	17. Engage Speakers and Performers	16.03 Structure and sequence program components			
		17.01 Determine event requirements for speakers and performers			
		17.02 Develop selection criteria			
		17.03 Select candidates			
		17.04 Secure contracts and communicate expectations			
	18. Coordinate Food and Beverage Services	18.01 Determine food & beverage service requirements			
		18.02 Select menu(s)			
		18.03 Plan service style(s)			
		18.04 Select food and beverage provider(s)			
		18.05 Manage alcohol service			
	19. Design Environment	19.01 Establish functional requirements			
		19.02 Select decor and furnishings			
		19.03 Coordinate meeting or event signage			
	20. Manage Technical Production	20.01 Determine requirements for staging and technical equipment			
		20.02 Acquire staging and technical equipment			
		20.03 Install staging and technical equipment			
		20.04 Oversee technical production operation			
	21. Develop Plan for Managing Movement of Attendees	21.01 Develop admittance credential systems			
		21.02 Select crowd management techniques			
		21.03 Coordinate accommodation and transportation			
		21.04 Manage protocol requirements			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
I. SITE MANAGEMENT	22. Select Site	22.01 Determine site specifications			
		22.02 Identify and inspect sites			
	23. Design Site Layout	2.01 Design site layout			
	24. Manage Meeting or Event Site	24.01 Create logistics action plan for set-up & take-down			
		24.02 Set up site			
		24.03 Monitor site during meeting or event			
		24.04 Take down site			
	25. Manage On-site Communication	25.01 Establish communications framework			
		25.02 Determine & acquire required communication equipment			
		25.03 Specify communication procedures and protocols			
J. MARKETING	26. Manage Marketing Plan	26.01 Conduct situational analysis			
		26.02 Define target market segments			
		26.03 Develop branding for meeting or event			
		26.04 Select marketing distribution channels			
		26.05 Develop integrated marketing strategy			
		26.06 Implement marketing plan			
	27. Manage Marketing Material	27.01 Determine marketing materials needed for event			
		27.02 Develop content and design parameters			
		27.03 Produce marketing materials			
		27.04 Distribute marketing materials			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
J. MARKETING (cont.)	28. Manage Meeting or Event Merchandise	28.01 Develop product(s) design and specifications			
		28.02 Determine pricing			
		28.03 Control brand integrity			
		28.04 Produce merchandise			
		28.05 Distribute merchandise			
		28.06 Coordinate hospitality			
	29. Promote Meeting or Event	29.01 Develop advertising plan			
		29.02 Develop cross-promotional activities			
		29.03 Develop contests			
		29.04 Coordinate sale promotion			
	30. Contribute to Public Relations Activities	30.01 Contribute to public relations strategy			
		30.02 Contribute to publicity plan			
		30.03 Develop media relations			
		30.04 Contribute to implementation of publicity plan			
		30.05 Manage crises and controversies			
	31. Manage Sales Activities	31.01 Develop sales plan and objectives			
		31.02 Conduct sales activities			
		31.03 Determine sales platforms			
K. PROFESSIONALISM	32. Exhibit Professional Behavior	32.01 Project a professional image			
		32.02 Demonstrate leadership			
		32.03 Demonstrate ethical behavior			
		32.04 Work with colleagues			
		32.05 Work in a diverse environment			
		32.06 Manage time			
		32.07 Manage stress			
		32.08 Make decisions			
		32.09 Solve problems			
		32.10 Keep up to date w/ changes in meetings/ event industry			
		32.11 Facilitate continuous improvement			
		32.12 Participate in professional development activities			

Category	Skill (breadth)	Sub-skills (depth)	√ Include the topic	At what level? (See Appendix 2 for exit levels, K&P ratings	
				Knowledge Level	Performance Level
L. COMMUNICATION	33. Conduct Business Commun-ications	33.01 Communicate verbally			
		33.02 Communicate in writing			
		33.03 Use communication tools			
		33.04 Make effective presentations			
		33.05 Plan and conduct meetings			
		33.06 Establish and conduct business relationships			
SUMMARY					
No. of Sub-skills to be included in our curriculum					
Comments regarding complexity level match to the *MBECS*					

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
A. STRATEGIC PLANNING			
1. Manage Strategic Plan for Meeting or Event			
1.01 Develop mission goals & objectives			
1.02 Determine feasibility of meeting or event			
1.03 Determine requirements to carry out meeting/event			
1.04 Develop financial summary			
1.05 Monitor strategic plan			
2. Develop Sustainability Plan for Meeting or Event			
2.01 Implement sustainability management plan			
2.02 Demonstrate environmental responsibility			
3. Measure Value of Meetings and Business Events			
3.01 Develop evaluation plan			
3.02 Measure return on investment			
3.03 Evaluate/audit meeting or event			
3.04 Evaluate effectiveness of risk management plan			

Programs that cover strategic planning at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to assist with the implementation and monitoring of meeting plans by gathering data as directed and providing continuous feedback to manager.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to take an organized approach to meeting management by formulating mission, goals and objectives; by determining the feasibility of events; and by monitoring and evaluating activities to ensure they meet the desired outcomes and contribute to event sustainability.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to base meetings and business event plans on research and analysis, trends, goals and objectives, larger organizational plans and financial resources; work within economic and social realities and consider impacts; and work within unique conditions and in highly complex and unpredictable environments.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
B. PROJECT MANAGEMENT			
4. Plan Meeting or Event			
4.01 Develop project plan			
4.02 Develop quality standards, policies, procedures			
4.03 Develop theme for event			
4.04 Develop procurement plan			
4.05 Establish milestones and critical path			
4.06 Develop integrated communication plan			
4.07 Develop evaluation/audit procedures			
5. Manage Meeting or Event Project			
5.01 Manage critical path			
5.02 Manage contracts			
5.03 Manage running of meeting or event			

Programs that cover project management at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to provide input into and follow project plans for meeting or event and maintain flow of activities by ensuring key resources and personnel are in place.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to manage meeting or event to achieve mission, goals, objectives and quality standards within the constraints of the meeting's scope, time and budget.

Direct Level
will provide graduates with knowledge and abilities that prepare them to develop creative and comprehensive meeting or event plans based on industry standards and strategic plan and establish objective measurement and audit criteria for highly complex events.

Undergraduate courses that cover project management at the:

Coordinate Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Provide input into project plans using their knowledge of the event and creativity for the manager's consideration.
2. Follow the project plans to ensure activities contribute to achieving the event's goals and quality standards.
3. Maintain the flow of activities during the event by following the agreed-upon plans.

Manage Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Develop a plan that will allow the project team to achieve the event's mission, goals and objectives.
2. Develop quality standards, policies and procedures to ensure the event meets legal, regulatory, ethical and social requirements.
3. Develop a theme for the event that reflects stakeholders' expectations, branding and creativity.
4. Develop a procurement plan that provides guidelines for event team to ensure necessary products and services are obtained within budget.
5. Establish milestones and a critical path for the event by identifying links, timelines and critical dates.
6. Develop a communication plan that specifies policies and procedures for information collection, distribution, document design, storage and security.
7. Develop evaluation/audit policies and procedures that incorporate critical success factors.
8. Manage critical path by continually monitoring for variances and implementing corrective action as needed.
9. Manage procurement process by developing RFPs, evaluating proposals, negotiating contracts, and ensuring contractual obligations are met.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
C. RISK MANAGEMENT			
6. Manage Risk Management Plan			
6.01 Identify risks			
6.02 Analyze risks			
6.03 Develop management and implementation plan			
6.04 Develop and implement emergency response plan			
6.05 Arrange security			

Programs that cover risk management at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to recognize risks related to tasks and adhere to risk management plan and arrange and monitor security requirements.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to identify and analyze risks and develop and implement basic risk management plans to reduce the probability and impact of undesirable situations.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to analyze risks and develop comprehensive risk management and emergency response plans to cover unpredictable and complex situations.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
D. FINANCIAL MANAGEMENT			
7. Develop Financial Resources			
7.01 Manage sponsorship process			
7.02 Manage donor process			
7.03 Manage program funding process			
7.04 Manage registration process			
8. Manage Budget			
8.01 Develop budget			
8.02 Establish pricing			
8.03 Establish financial controls and procedures			
8.04 Manage cash flow			
8.05 Monitor budget performance			
8.06 Revise budget			
9. Manage Monetary Transactions			
9.01 Establish cash handing procedures			
9.02 Monitor cash handling procedures			

Programs that cover financial management at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to supervise registration and cash handling and follow financial control guidelines.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to develop, monitor, and revise project budget; to monitor revenue streams and cash flow; to make ongoing effective decisions and wise resource allocations; and to develop and manage registration process.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to design and build a range of revenue streams and manage financial processes and pricing.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
E ADMINISTRATION			
10. Perform Administrative Tasks			
10.01 Coordinate office administration			
10.02 Manage information system			
10.03 Write reports			

Programs that cover administration at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to standardize and monitor office administration functions such as record keeping and equipment service, follow information system protocols and document and share information related to job responsibilitiess.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to oversee administrative functions to support operations including creating and monitoring the management information system and producing formal business documents to meet organizational reporting requirements.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
F. HUMAN RESOURCES			
11. Manage Human Resource Plan			
11.01 Determine workforce requirements			
11.02 Establish workforce policies and procedures			
11.03 Develop training plan			
11.04 Monitor human resources plan			
12. Acquire Staff and Volunteers			
12.01 Develop selection criteria			
12.02 Recruit staff and volunteers			
12.03 Interview candidates			
12.04 Select best candidate and offer position			
13. Train Staff and Volunteers			
13.01 Provide orientation			
13.02 Provide training			
14. Manage Workforce Relations			
14.01 Supervise staff and volunteers			
14.02 Motivate staff and volunteers			
14.03 Manage teams			
14.04 Evaluate staff			
14.05 Process terminations and resignations			

Programs that cover human resources at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to follow human resource plan and assist with recruiting and orientating new staff and volunteers.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to select and manage staff and volunteers according to the human resource plan and to motivate and train teams and individuals.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to create and monitor human resource plan to achieve event and organizational goals, build teams and develop training and development plan for staff.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
G. STAKEHOLDER MANAGEMENT			
15. Manage Stakeholder Relationships			
15.01 Identify stakeholders			
15.02 Assess stakeholders			
15.03 Classify stakeholders			
15.04 Manage stakeholder activities			
15.05 Manage stakeholder relationship			

Programs that cover stakeholder management at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to identify internal and external stakeholders, be sensitive to their potential impact on the meeting or event, coordinate stakeholder activities and communicate stakeholder concerns and interests to management.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to select and manage staff and volunteers according to the human resource plan and to motivate and train teams and individuals.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to build and manage stakeholder relationships to benefit organization and stakeholders and evaluate stakeholder satisfaction.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
H. MEETING OR EVENT DESIGN			
16. Design Program			
16.01 Determine program components			
16.02 Select program content and delivery formats			
16.03 Structure and sequence program components			
17. Engage Speakers and Performers			
17.01 Determine event requirements for speakers and performers			
17.02 Develop selection criteria			
17.03 Select candidates			
17.04 Secure contracts and communicate expectations			
18. Coordinate Food and Beverage Services			
18.01 Determine food & beverage service requirements			
18.02 Select menu(s)			
18.03 Plan service style(s)			
18.04 Select food and beverage provider(s)			
18.05 Manage alcohol service			
19. Design Environment			
19.01 Establish functional requirements			
19.02 Select decor and furnishings			
19.03 Coordinate meeting or event signage			
20. Manage Technical Production			
20.01 Determine requirements for staging and technical equipment			
20.02 Acquire staging and technical equipment			
20.03 Install staging and technical equipment			
20.04 Oversee technical production operation			

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
H. MEETING OR EVENT DESIGN (continued)			
21. Develop Plan for Managing Movement of Attendees			
21.01 Develop admittance credential systems			
21.02 Select crowd management techniques			
21.03 Coordinate accommodation and transportation			
21.04 Manage protocol requirements			

Programs that cover meeting or event design at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to assist with meeting or event design by providing input on program components and selecting speakers and performers; plan food and beverage service and select contractors; coordinate décor, staging, technical equipment, production, accommodation and transportation; and manage protocol requirements.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to determine program components and sequence; develop selection criteria for, negotiate and execute contracts for speakers and performers; determine food and beverage requirements, the desired design environment (theme and décor) and requirements for staging and technical equipment and production; and develop admittance credential systems and related crowd management techniques.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to design program components and delivery formats and determine functional requirements.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
I. SITE MANAGEMENT			
22. Select Site			
22.01 Determine site specifications			
22.02 Identify and inspect sites			
23. Design Site Layout			
23.01 Design site layout			
24. Manage Meeting or Event Site			
24.01 Create logistics action plan for set-up & take-down			
24.02 Set up site			
24.03 Monitor site during meeting or event			
24.04 Take down site			
25. Manage On-site Communication			
25.01 Establish communications framework			
25.02 Determine & acquire required communication equipment			
25.03 Specify communication procedures and protocols			

Programs that cover site management at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to develop site specifications; assist with site layouts/ floor plans; set up, monitor and take down sites following logistics action plan; and obtain and monitor operation of onsite communication equipment

Manage Level
Will provide graduates with knowledge and abilities that prepare them to manage meeting or event site(s) by completing site inspections and selecting the best option; creating site layouts/floor plans; developing the logistics plan; monitoring the set up, take down and running of the event; and establishing onsite communication protocol.

Undergraduate courses that cover site management at the:

Coordinate Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Develop site specification options that incorporate all identified requirements for manager's review.
2. Research and evaluate proposals from potential sites or venues using site specifications contained in RFP to make recommendations to manager.
3. Set up, monitor and take down sites following logistics action plan provided by manager to ensure activities are completed as specified.
4. Obtain the required onsite communication equipment to enable the sharing of information during set up, running and take down of the site.

Manage Level

Will provide graduates with knowledge and abilities that prepare them to:

1. Inspect recommended sites to determine how well each one matches the identified site specification criteria.
2. Select best site based on ratings and develop rationale for choice(s).
3. Create site layout/floor plans to make the most efficient and effective use of facilities and space.
4. Develop logistics action plan to specify the appropriate sequencing and timing of activities required for set up, running and take down of site.
5. Monitor the set up, take down and running of the meeting to ensure a smooth execution of the logistics action plan.
6. Establish onsite communication protocol to clarify communication expectations for event team.

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
J. MARKETING			
26. Manage Marketing Plan			
26.01 Conduct situational analysis			
26.02 Define target market segments			
26.03 Develop branding for meeting or event			
26.04 Select marketing distribution channels			
26.05 Develop integrated marketing strategy			
26.06 Implement marketing plan			
27. Manage Marketing Material			
27.01 Determine marketing materials needed for event			
27.02 Develop content and design parameters			
27.03 Produce marketing materials			
27.04 Distribute marketing materials			
28. Manage Meeting or Event Merchandise			
28.01 Develop product(s) design and specifications			
28.02 Determine pricing			
28.03 Control brand integrity			
28.04 Produce merchandise			
28.05 Distribute merchandise			
28.06 Coordinate hospitality			
29. Promote Meeting or Event			
29.01 Develop advertising plan			
29.02 Develop cross-promotional activities			
29.03 Develop contests			
29.04 Coordinate sale promotion			

Curriculum will cover the sub-skills at an applicable level of learning (coordinate, manage and direct) with completion at the exit points indicated below.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
30. Contribute to Public Relations Activities			
30.01 Contribute to public relations strategy			
30.02 Contribute to publicity plan			
30.03 Develop media relations			
30.04 Contribute to implementation of publicity plan			
30.05 Manage crises and controversies			
31. Manage Sales Activities			
31.01 Develop sales plan and objectives			
31.02 Conduct sales activities			
31.03 Determine sales platforms			

Programs that cover marketing at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to use marketing plans to produce and distribute marketing materials and merchandise and organize hospitality services and facilities.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to assist with the development of a marketing plan and then implement it, communicate effectively with potential attendees to maximize sales and registration and design product and establish pricing for merchandise.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to develop marketing plans and strategies based on situational analysis and defined target markets and develop content of and design parameters for marketing materials and products.

As no ratings were provided for the sub-skills in this category, only the content of the standards was used to develop the program outcomes.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
K. PROFESSIONALISM			
32. Exhibit Professional Behaviour			
32.01 Project a professional image	Interwoven throughout programs		
32.02 Demonstrate leadership			
32.03 Demonstrate ethical behaviour			
32.04 Work with colleagues			
32.05 Work in a diverse environment			
32.06 Manage time			
32.07 Manage stress			
32.08 Make decisions			
32.09 Solve problems			
32.10 Keep up to date w/ changes in meetings/event industry			
32.11 Facilitate continuous improvement			
32.12 Participate in professional development activities			

Programs that cover professionalism at the:

Coordinate Level
Will provide graduates with knowledge and abilities that prepare them to exhibit desirable personal and professional characteristics and behaviors, work effectively and ethically with internal and external stakeholders in a diverse environment and seek ongoing professional development.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to ensure professionalism of team members by establishing expectations and procedures for staff and organization and developing strategies and providing support for continuous improvement.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to facilitate professionalism in the industry through leadership and participation in industry organizations that include goals to provide networking, information sharing, professional development or industry standards development.

As no ratings were provided for the sub-skills in this category, only the content of the standards was used to develop the program outcomes.

	Curriculum Levels		
***MBECS* Categories, Skills and Subskills**	**1. Coordinate**	**2. Manage**	**3. Direct (post-grad)**
L. COMMUNICATION			
33. Conduct Business Communications			
33.01 Communicate verbally	Interwoven throughout programs		
33.02 Communicate in writing			
33.03 Use communication tools			
33.04 Make effective presentations			
33.05 Plan and conduct meetings			
33.06 Establish and conduct business relationships			

Programs that cover communication at the:

Coordinate Level
Will providegraduates with knowledge and abilities that prepare them to communicate with staff, volunteers and suppliers to build relationships; carry out job responsibilities; and achieve meeting or event goals.

Manage Level
Will provide graduates with knowledge and abilities that prepare them to use communication skills and tools and influence the behavior of internal and external stakeholders and contacts in order to meet project and organizational goals.

Direct Level
Will provide graduates with knowledge and abilities that prepare them to use communication skills and technology to build organizational relationships, impart key messages and ensure clarity of understanding with various and diverse audiences and facilitate consensus building in difficult situations and where differences in opinion and need exist among stakeholders.

1. Knowledge Domain – Level Descriptors

	BASED ON ADAPTED BLOOM'S KNOWLEDGE TAXONOMY*			BASED ON NATIONAL QUALIFICATION FRAMEWORKS
Coordinate	K1	Remember	Know what: Recall data or information and quote rules, definitions and laws	Graduates of this level should possess: • Basic general knowledge of the industry • Concrete knowledge involving facts, concepts, procedures, technology • Awareness of different perspectives and approaches within their areas of work • Awareness of the boundaries of their knowledge
	K2	Understand	Know why: Understand the meaning and translate, interpolate and interpret instructions and problems. State a problem in one's own words.	
	K3	Apply	Know how: Use a concept in a new situation or unprompted use of an abstraction. Apply what was learned in the classroom into novel situations in the work place. Put a theory into practical effect. Demonstrate, solve a problem and manage an activity. **K3 will span Coordinate and Manage levels**	
Manage	K4	Analyze	Know how: Examine information in order to understand, explain or predict. Separate material or concepts into component parts so that its organizational structure may be understood. Distinguish between facts and inferences. Interpret elements, organizational principles, structure, construction and internal relationships. Determine quality and reliability of individual components.	Graduates of this level should possess: • Advanced knowledge of the industry • Knowledge that is comprehensive and specialized with integration of concepts and theories across a variety of competency areas • In-depth knowledge of different perspectives, approaches and schools of thought relevant to the industry and the reasoning behind them • Recognition of the limitations of their knowledge, additional knowledge needed and sources for ongoing professional development
	K5	Evaluate	Know how: Weigh ideas and make judgments about the value of ideas or materials. Assess the effectiveness of whole concepts, in relation to values, outputs, efficacy and viability. Exercise critical thinking. Conduct strategic comparison and review and make judgments relating to external criteria. **K5 will span Manage and Direct levels**	
Direct	K6	Create	Know how: Bring information together so that something can be decided or acted upon. Build a structure or pattern from diverse elements. Put parts together to form a whole, with emphasis on creating a new meaning or structure. Create new patterns/ concepts structures, systems, models, approaches and ideas.	Graduates of this level should possess: • Highly comprehensive and specialized knowledge • Knowledge that is at the forefront of the industry and serves as the basis for original thinking and/or research • Critical awareness of knowledge issues and trends in the industry and at the interface between different fields

*Taken from the report to the Canadian Tourism Human Resource Council "Competency Standards and Qualifications Frameworks: Exploring the Value of Bloom's Taxonomy as a Tool for Mapping and Analysis" by Nigel Lloyd (2010).

2. Performance Domain – Level Descriptors

	BASED ON ADAPTED BLOOM'S SKILL TAXONOMY*			BASED ON NATIONAL QUALIFICATION FRAMEWORKS	BASED ON WORKPLACE RESPONSIBILITIES AND AUTONOMY
Coordinate	S0	Awareness	Conscious incompetence	Graduates of this level should be able to: • Complete tasks that are well-defined and routine and sometimes complex and non-routine • Apply known solutions to a variety of predictable problems and sometimes problems that are not predictable • Interpret information from provided sources • Follow standards and requirements • Take responsibility for initiating and completing assigned tasks • Exercise autonomy and judgment that is subject to overall direction and guidance • Supervise the routine work of others, taking some responsibility for the evaluation and improvement of work activities • Take responsibility for own learning within a supervised environment	Individuals working at the coordinate level assist a meeting manager and are responsible for coordinating and implementing detailed meeting plans and the registration process; recruiting, training and supervising volunteers and support staff; and assisting with reports and event evaluation.
	S1	Readiness	Know and be ready to act upon a sequence of steps in a process. Recognize one's abilities and limitations (health and safety).		
	S2	Attempting	Imitation: Observe and pattern behavior after someone else, following instructions and practicing. Performance may be of low quality. **Guided Response:** Learn a complex skill (early stages) including imitation and trial and error. Adequacy of performance is achieved by practicing.		
	S3	Basic Proficiency	Learned responses have become habitual and the movements can be performed with some confidence, precision and proficiency. Few errors are apparent. Conscious competence.		

*Taken from the report to the Canadian Tourism Human Resource Council "Competency Standards and Qualifications Frameworks: Exploring the Value of Bloom's Taxonomy as a Tool for Mapping and Analysis" by Nigel Lloyd (2010).

2. Performance Domain – Level Descriptors

	BASED ON ADAPTED BLOOM'S SKILL TAXONOMY*			BASED ON NATIONAL QUALIFICATION FRAMEWORKS	BASED ON WORKPLACE RESPONSIBILITIES AND AUTONOMY
Manage	S4	Professional Proficiency	Skilful performance involves complex patterns. Proficiency is indicated by quick, accurate and highly coordinated performance, requiring a minimum of energy. Coordinate and integrate a series of actions, achieving harmony and internal consistency. This category includes performing without hesitation and automatic performance.	Graduates of this level should be able to: • Exercise judgment in planning, design, technical and/or supervisory functions related to products, services, operations or processes • Determine, adapt and use appropriate methods and skills to complete tasks • Address problems that are broadly defined and complex • Initiate and use investigation to inform actions • Evaluate actions, methods and results • Identify, analyze and evaluate information from a variety of sources • Monitor quality against existing standards and requirements • Take responsibility for planning courses of action, including the work of others • Exercise autonomy and judgment within broadly defined parameters • Accept accountability for determining and achieving personal and group outcomes • review and develop the performance of self and others	Individuals working at the manage level are responsible for planning and managing meetings to achieve the goals and objectives of the strategic plan through program design, event implementation and management. They monitor and evaluate meeting outcomes and train and manage staff. They report to, or take direction from, a meeting director.

*Taken from the report to the Canadian Tourism Human Resource Council "Competency Standards and Qualifications Frameworks: Exploring the Value of Bloom's Taxonomy as a Tool for Mapping and Analysis" by Nigel Lloyd (2010).

2. Performance Domain – Level Descriptors

	BASED ON ADAPTED BLOOM'S SKILL TAXONOMY*			BASED ON NATIONAL QUALIFICATION FRAMEWORKS	BASED ON WORKPLACE RESPONSIBILITIES AND AUTONOMY
Direct	S5	Adaptable Proficiency	Unconscious competence. High-level performance becomes natural, without needing to think much about it. Skills are well developed and the individual can modify movement patterns to fit special requirements. Respond effectively to unexpected experiences. For example: Modify instruction to meet the needs of the learners.	Graduates of this level should be able to: • Conceptualize and address problematic situations in the organization or industry that involve many interacting factors • Manage and transform situations that are complex, unpredictable and require new strategic approaches • Design and undertake research, development or strategic activities to inform the industry or produce organizational or professional change • Share and promote new insights with peers and the community • Generate original knowledge and understanding to make a substantial contribution to the industry • Identify need for and develop quality standards and requirements • Strategically connect meetings' objectives and plans to corporate or organizational goals • Take responsibility for planning and developing courses of action that initiate or underpin substantial changes or developments in the industry • Demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or research	Individuals working at the direct level may be at an executive level in an organization, responsible for connecting meetings and business events to overall organizational strategies and business plans. They work with other departments where applicable. They plan meetings based on research, knowledge of and involvement in the broader industry. They develop, manage and evaluate strategic objectives and financial plans and results. They are esponsible for stakeholder/sponsor/ funder relationships and oversee all related staff members.
	S6	Creative Proficiency	Create new movement patterns to fit a particular situation or specific problem. Learning outcomes emphasize creativity based upon highly developed skills. Develop new techniques and/or procedures.		

*Taken from the report to the Canadian Tourism Human Resource Council "Competency Standards and Qualifications Frameworks: Exploring the Value of Bloom's Taxonomy as a Tool for Mapping and Analysis" by Nigel Lloyd (2010).

SAMPLE SYLLABUS No. 1

Department of Hospitality Management
(January 2012 name change to School of Hospitality Leadership)
East Carolina University
Bachelor's Degree Program
All students minor in Business (18 credits)

Concentration in Meetings Conventions Events Overview:
Sophomore year: Introduction to the Meeting, Event and Convention Industry (HMGT 2200)
Junior year: Planning Meetings and Events (HMGT 3400)
Junior/senior year: Internship in Meetings, Conventions and Events
Senior year: Convention Sales and Services (HMGT 4400)
Additional course being developed in Producing Meetings, Conventions and Events for junior/senior year

East Carolina University
Meeting and Event Planning HMGT3400
Fall 2011

Instructor:
Dr. George Fenich
College of Human Ecology
Department of Hospitality Management
(252) 328-2190
fenichg@ecu.edu

Graduate Assistant: Tammy Pettigrew, Pettigrewt10@students.ecu.edu
Office Hours: By appointment, 1 p.m. - 2 p.m. and 3:30 p.m. - 4:30 p.m. TH
Scheduled Classes: Onsite 2 p.m. - 3:15 p.m. Thursdays in Rivers Room 212, Tuesdays by virtual classroom
Semester Duration: Aug. 23, 2011 to Dec. 13, 2011
Prerequisites: Completion of HMGT 2200 with a grade of a C or better or consent of instructor
Student Commitment in hours per week: Minimum 10

Objectives of this Course:

1. To assist the learner in developing an understanding of how to plan for meeting, exhibition, event and convention (MEEC) activities.
2. To develop an ability to evaluate MEEC activities.
3. To comprehend the financial issues of MEEC activities.
4. To recognize the legal issues associated and involved in MEEC activities.
5. To experience planning a MEEC activity.
6. To explore the role and function as a meeting planner.

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Methods: Instructional methods used during the course will include lecture, PowerPoint, group discussions, small group/project work and reports, guest speakers, reading, journal entries, minute papers and assessment through exams and tests.

Technology Requirements: You will need consistent, reliable access to the Internet in order to successfully complete this class. It would be best if you have a high-speed connection to the Internet, as there will be readings to download. For further information on technology requirements, go to www.ecu.edu/cs-acad/options/technology.cfm. There are no special software requirements for this course. However, if you are using a word processing package other than Word for Windows, please save your documents as Rich Text before sending.

Required Text: *Professional Meeting Management (5th Edition)* ISBN: 978-0-7575-2666-4

Classroom Environment & Class Requirements:

1) Participation. As a community of adult learners, we bring to this class an assortment of life and educational experiences, cultural backgrounds and individual perspectives. Participation in this class, be it face-to-face or online, is vital because shared experiences and perspectives assist in peer learning. Participation involves contributing and, therefore, it is more than just talking. It is completing the readings and other assignments and being prepared to share and discuss the topic at hand in a meaningful way. Participation in this class includes the following:

   a) Discussion Board: Post questions, comments, and observations on the Discussion Board, which is an asynchronous (not real-time) discussion tool. You can post to the Discussion Board whenever you want. Plan on posting and responding to at least two questions for each unit in this course. Do not wait until the last day of discussion to post your questions and comments.

      i) Discussion Board guidelines: Simple statements like "That's a good point" or "I agree with what you've said" are not substantive, state the obvious or do nothing to further the discussion. Add new perspectives, information or experience to the discussion thread or ask a question that forces the discussion to reconsider the topic being discussed or moves the analysis to a deeper level. It is perfectly acceptable and encouraged for you to disagree or challenge ideas and question material. However, you are required to engage in appropriate respectful interaction and proper e-etiquette.

      ii) Discussion Boards are worth 100 points. Each substantive posting therefore is worth 33 points.

   b) Centra (http://centra.ecu.edu): Log into Centra using your Pirate ID and password. This is a method of communication that will give you the opportunity to discuss topics using your webcam, microphone and/or in text format. These chats are recorded and will remain open throughout the semester so you may utilize this learning tool at your discretion to meet with your fellow classmates. NOTE: Centra participation is required for case studies.

   c) Attendance: Responsibility for class attendance rests with the student. Attendance is vital for success for this class. It is the student's responsibility to be punctual and prepared to learn in all learning environments.

   d) Minute Papers: Minute papers are assigned randomly through the semester. They are to be completed in class and will count towards your grade. There are 10 in the semester topics are generated from reading and/or lecture material. Good attendance and a disciplined reading schedule are vital ingredients to receiving these points.

   e) Journal Entries: Journal entries are designed to assist you as a study guide for each unit, for preparing for future assignments and for your examinations. There is a lot of flexibility when it comes to these entries as far as format and content.

   f) Notes: You are encouraged to take notes in this class on class lectures and on reading material.

2) Responsibility of the Instructor.

   a) Be punctual and prepared to assist the learner in developing concept and theory of material.

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b) Maintain scheduled office hours.

c) Promote a classroom environment conducive of learning.

3) Ethics. Please read & adhere to the ECU Statement on Academic Integrity found at www.ecu.edu/cs-studentslife/policyhub/academic_integrity.cfm.

4) ADA Compliance. East Carolina University seeks to comply fully with the Americans with Disabilities Act (ADA). Students requesting accommodations based on a disability must be registered with the Department for Disability Support Services located in Slay Room 138, (252) 737-1016 (Voice/TTY), dssdept@ecu.edu.

5) Course units, assignments, assessment and projects.

a) Course Units: This class has been divided into course units. Each unit is found under the Course Unit tab on Blackboard. Each folder contains your reading, unit assignments, associated PowerPoint(s), additional resources and the unit test. A breakdown of the assignments and point values are listed in the table below.

b) Assignments: All assignments will be posted to the discussion board unless otherwise noted. Assignments requested by drop box, email or through an assignment link should be copied to yourself and retained for the duration of the semester as proof of submission.

c) Assessment: Tests are required at the end of each unit and are always due at midnight. You have the option to take each test (excluding the mid-term and final exam) as many times as you wish; however, ONLY the last attempt will apply toward your grade. Test questions are randomized. You may not get the same test each time and each test is timed. Please do not exceed the allotted time or 10 points will be deducted from your final test grade. Mid-term and Final exams are cumulative. The mid-term will cover Units 1-4 and the Final will cover Units 1-8.

d) Exemption: Students will be exempt from taking the final exam if they score an AVERAGE of 95 on all tests for each unit presented in during the semester and the mid-term exam. This is an average of all your tests combined and not 95 or better on each test. Thus, a student who received 100 on most could get something less on one or two and still be exempt.

Assignment	Occurence	Point Value	Total Points
Journal Entries	8	25	200
Discussion Board	9	100	900
Case Studies	2	50	100
Syllabus Quiz	1	100	100
Minute Papers	10	10	100
Introduction	1	100	100
Projects	2	100	200
RFP Assignment	1	100	100
Tests	10	100	1000
Exams	2	100	200
Total	46		3000

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e) Projects: There will be two projects for the semester. The mid-term projects are peer and instructor assessed—fellow classmates will assess half of your grade and the instructor will assess the other half. Industry and academic experts will assess your final project.

6) Extra Credit. Extra credit is available by posting at minimum two typed pages of notes to the discussion board forum to assist your classmates with any unit assigned. You may use your class lecture notes, notes you have taken from the reading material, or even copy and paste one the assigned private journal entries. This option for extra credit will be available two times during the semester and will be applied to your lowest test score. The value of this assignment is 10 points for each post for a total of 20 additional points for the semester.

Grade	Percentage
A	90-100
B	80-89
C	70-79
D	60-69

7) Grades.

8) Course Policies.

a) Due dates: Due Dates are established and are noted for each assignment. You may and are encouraged to turn in assignments prior to the set due date. Late assignments are not permitted. All assignments are to be posted in the Discussion Forum where indicated unless otherwise noted.

b) Cell phones: Cell phones are to be turned off prior to class.

c) Grade Disputes: Please review the grade book frequently and address concerns immediately. No changes to grades will be made one week prior to the end of the semester.

d) Conduct: ECU has implemented a disruptive behavior policy. Students are expected to follow these policies. Failure to comply may result in removal from this class.

9)Final Tips. All written work will be evaluated on the basis of the following criteria:

a) Fulfills assignment

b) Is comprehensive

c) Is concise

d) Is appropriate

e) Is of high quality

f) Examines concepts and assumptions

g) Can be supported with a reasonable argument or resource

h) Communicates ideas clearly

i) Has quality, therefore, is free of spelling/grammar/punctuation errors. “It’s not possible or appropriate for us to try to teach grammar and spelling in a college course. But that doesn’t mean we can’t demand it. …The main thing students need to learn about correct spelling and grammar is schizophrenic: Correctness is not important for rough exploratory writing, but it’s crucial for final draft.” McKeachie and Svinicki (2006), p.255. What does this mean? In a nutshell, do not submit sloppy unedited work in this class.

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Unit/Duration	Class Meeting	Reading PMM	PPT	Lesson/Task	Unit Due
Getting Started • Syllabus Review • Course Overview	8/2	Ch. 1	1	DB Introductions Syllabus Quiz	Due by 8/25
Unit 1 (PART 1) • Strategy • 8/23-9/1 • Lecture	9/1	2, 6 (21 pgs)	2,6	Journal Entry 1 Test 1 (excludes chapter 1)	Due by 9/1
Unit 1 (PART 1) • Strategy • 8/23-9/1 • Lecture	9/8	Ch. 19, 21,22,23 (70 pgs)	19, 21, 22, 23	Journal Entry 2 Test 2 RFP Assignment	Due by 9/8
Unit 2 • Financial Risk & • Risk Management • 9/9-9/15 • Lecture	9/15	Ch. 44, 3, 4 (48 pgs)	44, 3, 4	Journal Entry 3 Discussion Board 1 Test 3	Due by 9/15
Unit 3 Human Resources Professionalism Ethics 9/16-9/22 • Lecture	9/22	Ch. 39, 9 (24 pgs)	39, 9	Journal Entry 4 • Discussion Board 2 • Case Study • Test 4	Case Study on Centra 9/20 @ 2 p.m. Due by 9/22
Unit 4 Marketing 9/23-9/29 • Lecture	9/29	Ch. 5, Step-up PDF (22 pgs)	5	Journal Entry 5 • Discussion Board 3 • Test 5	Due by 9/29
Midterm Prep 9/30-10-6 • Review & Lecture Units 1-4	10/6				
Fall Break 10/8-10/11					

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Unit/Duration	Class Meeting	Reading PMM	PPT	Lesson/Task	Unit Due
Midterm Exam	10/13			• Project Concept Due • Team Member Evaluation Due • Request to Terminate Team Member Due	10/13
Unit 5 (Part 1) 10/12–10/20 Site Management • Lecture	10/20	11, 12, 14 (50 pgs)	11, 12, 14	• Discussion Board 4 • Test 6	Due by 10/20
Unit 5 (Part 2) Site Management 10/21-10/27 • Lecture	10/27	26, 31, 33, 34 (50 pgs)	26, 31, 33, 3	• Discussion Board 5 • Discussion Board 6 • Journal Entry 5 • Test 7 • Termination Hearings	DB 5 Due by 10/23 Unit Due 10/27
Unit 6 Meeting Production 10/28-–11/3 • Lecture	11/3	35, 36 (27 pgs)	35, 36	• Discussion Board 7 • Guest Speaker • Test 8	Due by 11/3
Unit 7 Suppliers & Contracted Services 11/4-11/10 • Lecture	11/10	37, 38 (27 pgs)	37, 38 (27 pgs)	• Journal Entry 6 • Discussion Board 8 • Case Study • Test 9	11/10 Case Study on Centra 11/8 @ 2 p.m.
Unit 8 Students Choice 11/11-11/17	11/17	TBD	TBD	• Journal Entry 7 • Discussion Board 9 • Final Project Outline Due • Test 10	Due by 11/17
Thanksgiving Break 11/23–11/27					
Final Project	12/1			• Project Presentations	Due by 12/1 2-6 p.m.
Final Exam Prep 11/28-12/8 • Lecture & Review Units 5 - 8	21/8			• Journal Entry 8	Due by 12/8
Final Exam	12/13				2-4:30 p.m.

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APPENDIX – SAMPLE SYLLABUS No. 2

Department of Tourism, Convention and Event Management

Indiana University, Indianapolis

Bachelor and Masters of Science Degree Program, Certificate in Event Management

Mechanics of Meeting Planning

TCEM- 271, Spring 2011

Meeting Times: Noon - 1:15 p.m. Mondays and Wednesdays, PETM Learning Lab (W)

Required Text: *Professional Meeting Management (5th Edition)*, Editor: Glen Ramsborg, PhD

Instructor:

Amanda Cecil, PhD, CMP, TCEM

Office: PE 258B, Telephone: 278.8569

Email: akcecil@iupui.edu

Course Description

An analysis of details pertinent to the organization and execution of a meeting. Topics include finances and contracts, site selection, program development, marketing, and evaluation and wrap up.

Course Objectives

As part of the department's on-going effort to assess each course and consequently the program as a whole, a two-step method is used to identify the purpose of each objective:

Step 1) Selection of the appropriate learning domain from a list of three that includes:

- Foundation (F): Knowledge and comprehension
- Application (A): Practice, analysis, synthesis
- Execution (E): Continuous learning

Step 2) Selection of the appropriate principle(s) of undergraduate learning form a list adopted by the School of Physical Education and Tourism Management that includes:

- Core skills (CS): Reading, writing, speaking, listening, quantitative analysis and use of information technology
- Critical thinking (CT)
- Intellectual breadth, depth and adaptiveness (IBDA)
- Integration and application of knowledge (IAK)
- Society and culture (SC)
- Values and Ethics (VE)

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In this course, you will learn to

- Explain the importance of defining meeting goal and objectives (F, CS)
- Develop a meeting budget and understand its elements (F, A, CS, CT)
- Identify the basic steps in selecting a site (F, A, IK).
- Demonstrate integrated marketing strategies (F, A, CS)
- Define and understand the roles of committees, volunteers, convention and visitors bureaus, suppliers and third party vendors (F)
- Identify the legal and ethical responsibilities of a meeting planner (A, CS, IK, VE)
- Analyze the elements of an effective learning environment (F, A, E, CS, CT, IK)
- Explore the role of a meeting planner in the pre-event, onsite and post-event stage (F, A, CS)
- Identify new meeting technology, trends and future enhancements (F, A, E, CS, IK)

Evaluation

Mid-Term	100 points
Meeting Experience	25 points
Quiz #1	50 points
Reading quizzes	50 points (10 @ 5 points each)
Final	125 points
Case Studies	100 points (4 @ 25 points)
TOTAL:	450 points

Grading Scale

A = 414-450 (92-100%)

B = 369-413 (82-91%)

C= 324-368 (72-81%)

D= 297-323 (66-71%)

F= 0-296 (0-65%)

Course Expectations

- Attendance/ participation. In-class discussion and participation add a great deal to the overall learning process. When a class is missed, that aspect of learning is missed also. Attending and participating in class is a factor in your course grade. Please contact the instructor immediately with special circumstances that require a period of class time missed (serious illness, family circumstance). In these instances, a test or quiz can be made up or an assignment accepted late. The instructor will assign + or – to your grade based on your participation and attendance. I will only consider rounding up a grade at the end of the semester if you have attended and participated in class regularly and all assignments were submitted on time.
- Course content and materials. Students are required to read and review the entire required text. Not all material will be covered in the classroom. The instructor may add, delete or expand on certain course topics.
- Assignments. All assignments must be typed on 8” x 11” paper, double-spaced with a 12-point font. Hand-written material is not acceptable. Please ensure your name is clearly typed at the top of the page. Spelling and grammar mistakes are not

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acceptable. Five points per mistake will be deducted from typed assignments.

Assignments are due at noon on the date listed on the course agenda. Assignments submitted between 12:01 p.m. and 4:59 p.m. that day will be accepted at 50 percent credit. After 5 p.m. on the due date, no late assignments will be accepted.

- Common courtesy. Please turn off cell phones, pagers and headsets while in class. Do not text message or email during class. Laptops are allowed to take class notes only. Please sit in the front row of seats if you prefer to use a computer for note taking. Feel free to bring a drink to class; however, no eating is permitted. Do not bring guests to class unless approved by the instructor. Walking in late to class is rude; please be on time. If you are texting during class, I will email you that you must complete a 10-page research paper on event technology. If you need to take a call or send a message, please leave the learning environment.
- Late assignments or make-up exams. Assignments turned in late will not be accepted and make-up exams will not be permitted. If you have an unusual circumstance, please contact the instructor PRIOR to the exam. Assignments will be collected at the beginning of the class session they are due. If noted, the assignment must be placed in the Oncourse drop box by the time listed on the syllabus.
- Exams and grades. The format and content of the mid-term and final exam will be reviewed prior to the scheduled exam date.

As upper level college students, you are expected to act and behave according to the rules and regulations identified in the IUPUI Student Guide. All students are expected to:

- Treat everyone with the class with the respect due to all human beings.
- Attend class, give your full attention to the material and conduct yourself in an appropriate manner.
- Take lecture notes and review the assigned readings before every class.
- Agree to do the work outlined on the course syllabus on time.
- Acknowledge that previous academic preparation (writing skills) will affect your performance.
- Not plagiarize or steal the work of others.
- Acknowledge that your perception of effort, by itself, is not enough to justify a distinguished grade.

Academic Misconduct

IUPUI has established general guidelines concerning student academic conduct. These guidelines respect the right of every student to fully exercise their freedom to learn without interference. The university has established parameters of academic misconduct, which include, but are not limited to, cheating, fabrication, plagiarism, interference, violation of course rules and facilitating academic dishonesty. Failure to adhere to these policies may be grounds for receiving a failing grade for the ENTIRE course as well as being subjected to further disciplinary action. Please refer to pages 28-29 in the IUPUI Code of Student Rights, Responsibilities, and Conduct for further clarification (http://dsa.indiana.edu/Code/index.html). The following list of forms of academic misconduct will not be tolerated in any way in this class.

- Cheating. Use of an authorized "aid" while taking a test, having another person take an exam or quiz in the place of a student, stealing an examination, using group work as an individual student's work or unauthorized use of assistance from a lab or computer technician.
- Fabrication. Falsifying data in laboratory results, inventing information for a report or falsifying citations to sources of information.
- Facilitating Academic Dishonesty. Aiding another student in committing academic misconduct.
- Interference. Stealing, changing, destroying or impeding another student's work. Impeding includes stealing, defacing or mutilating resources to deprive someone the use of resources.
- Plagiarism. Using the ideas, words, or statements of another person without giving credit to that person. A student shall give credit to the works of others if the student uses another person's words, ideas, opinions or theories or borrows facts, statistics or

other illustrative material unless the information is common knowledge.

- Violation of Course Rules. A student shall follow course rules in the course syllabus when those rules are related to the course content or to the enhancement of the learning process in the course.

First time violations of the rules listed above will result in a "zero" for the assignment or exam. Subsequent violations or egregious violations may result in an "F" for the course.

Any student needing special assistance with course information should contact the TCEM department at 274-2599.

TCEM 271 - Course Agenda

Class Date	Module	Chapter(s) to Read	Assignment
Jan. 10	NO CLASS		
Jan. 12	Welcome		
Jan. 17	NO CLASS- MLK DAY		
Jan. 19	Module 1	2	Reading Quiz #1 (MOD 1)
Jan. 24	Module 2	18 & 20	Reading Quiz #2 (MOD 2 and 3)
Jan. 26	Module 3	3	
Jan. 31	Module 4	4 & 5	Reading Quiz #3 (MOD 4 and 5)
Feb. 2	Module 5	11, 14 & 15	
Feb. 7	APEX RFP Lab		
Feb. 9	Site Visit Omni Severin		
Feb. 14	Site Visit Crowne Plaza		
Feb. 16	Module 6	19 & 21	
Feb. 21	Module 7	39 & 41	Case Study #1 DUE/ Reading Quiz #4 (MOD 7)
Feb. 23	Module 7	39 & 41	
Feb. 28	QUIZ/PREP for Contract Negotiation		
March 2	Contract Negotiation		
March 7	Module 8	24 & 25	Reading Quiz #5 (MOD 8/9)
March 9	Module 9	26	Midterm DUE by Friday, March 12 at noon
March 21	Module 10	23	
March 23	Module 11	29	Reading Quiz #6 (MOD 10/11)
March 28	Dan Snow		
March 30	RoomViewer		
April 4	Module 12 and Guest Speaker: Mark Wallis	43	
April 6	ADA Activity		Reading Quiz #7 (MOD 12)
April 11	Module 13	9, 35 & 37	
April 13	Module 14	34 & 44	Reading Quiz #8 (MOD 14)
April 18	John Gosney – Second Life		Case 2/3 DUE
April 20	Module 15	38 & 45	Reading Quiz #9 (MOD 15)
April 25	Module 16	16, 22 & 27	Reading Quiz #10 (MOD 16)
April 27	Wrap-Up		Case Study #4 DUE
May 2	Review: Meeting BINGO!		
May 4	FINAL EXAM @ 10:30am		

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APPENDIX – SAMPLE SYLLABUS No. 3

Meeting & Event Management Associate Degree.

Madison College. Madison, Wisconsin USA

Exposition Management

Fall 2011 Class Syllabus

Madison Area Technical College

Course Information

10109112 | Class Number: 38869

Class start date: Thursday, Sept. 1, 2011

Class end date: Thursday, Nov. 17, 2011

Credits: 2

Course Format: Online

Pre-Requisites: Fundamentals of Meeting Management, 10109102 and Meeting Industry Budget and Financial Management 10109108

Instructor

Janet Sperstad, CMP

Email: jsperstad@madisoncollege.org

Office: 608-246-6585

Office Hours:

Required Textbook

The Art of the Show, Third Edition (ISBN 0-9657982-2-4)

Course Objectives/Description

This course provides the student with an understanding of exhibitions as a source of revenue for the sponsor, as well as an opportunity for buyers and sellers to interact face-to-face in an educational environment. Students explore critical elements in a well-designed floor plan, identify contractors necessary for producing the show and learn how to effectively interact and communicate with exhibitors throughout the process.

- Identify various exposition marketing techniques
- Determine critical elements of a functional floor plan
- Identify the most common types of booths (or stands)
- Explore factors that impact traffic flow in a floor plan
- Summarize the products and services of a general service contractor

Attendance/participation

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Attending and participating in class is a factor in your course grade. To do well, you need to participate in class discussions and coursework. As a community of adult learners, we all bring to this class an assortment of life and educational experiences, cultural backgrounds, and individual perspectives. Participation in this class, whether face-to-face or online, is vital because shared experiences and perspectives assist in learn from each other. Participation involves contributing and therefore it implies critical thinking and thoughtful comments and ideas. It is completing the readings and other assignments and being prepared to share and discuss the topic at hand in a meaningful way. Participation points are assigned randomly throughout the semester and will be conducted in the classroom.

Assignments and quizzes

Under no circumstance are late assignments accepted. Take note of the due dates for activities and assignments and make sure you meet the deadline to receive full credit. All submitted assignments must be typed and include first and last name, course name and assignment name. Note all times listed on the syllabus are Central Standard Time. Assignments turned in late will not be accepted and make-up quizzes will not be permitted. If you have a VERY unusual circumstance, please contact the instructor PRIOR to the quiz.

Student conduct

As college students you are expected to:

- Treat everyone with respect
- Participate in weekly discussions
- Keep up on reading and lectures and review the assigned readings before every class.
- Agree to do the work outlined on the course syllabus on time.
- Acknowledge that previous academic preparation (e.g. writing skills) will affect your performance in this class.
- Not plagiarize or steal the work of others.

Quizzes/tests/exams

There will be two quizzes during the semester, worth 100 points each. Students may take the quiz any time during the following week that the quiz is posted. For instance, Quiz No. 1 will be posted at 5 p.m. Thursday, Sept. 22. Students will be able to access the exam until 5 p.m. Thursday, Sept. 29. There is a comprehensive final exam in this course.

Points/ Grading System

585 - 544	A
543 - 514	AB
513 - 485	B
484 - 456	BC
455 - 427	C
426 - 397	D
Below 396	F

Grade Breakdown	Total

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Chapter assignments (3) 60

Interview papers (2) 100

Onsite video journal (1) 125

Quizzes (2) 100

Final exam (1) 200

Total 585

Course Overview by Week

Date	Weekly Content	Weekly Assignments. Assignments due by 5:00 p.m.
9/1	Intro to Exhibit Management What is an Exhibition vs. a Trade Show?	Post an introduction and photo of yourself under the Discussion Board by Sept. 8 Weekly Reading: Section 1: Ch. 1 and 3
9/8	Exploring different types of exhibitions	Weekly Reading: Ch. 5 Chapter Assignment: Answer Section 1: Ch. 1 and 5 questions. Due by 5 p.m. Sept. 15.
9/15	Exposition and Marketing	Chapter Assignment: Answer Section 1: Ch. 1 and 5 questions. Due by 5 p.m. Sept. 15.
9/22	Quiz 1 (Sections I and II)	Study and take quiz by 5 p.m. Sept. 29.
9/29	Sites and Locations: Analyze Features and Benefits of Multi-purpose sites for Tradeshows and Exhibitions	Weekly Reading: Section IV: Ch. 2 Chapter Assignment: Answer Section IV: Ch. 2 Questions. Due by Oct 20.
10/6	Floor plans and layouts. Maximizing revenue while maximizing attendee engagement	Weekly Reading: Section IV: Ch. 2 Chapter Assignment: Answer Section IV: Ch. 2 Questions. Due by Oct 20.
10/13	Quiz 2 (Sections III and IV)	Study and take quiz by 5 p.m. Oct. 20
10/20	General Service Contractors. RFP for services	Weekly Reading: Section V: Ch. 1 and 6 Interview Paper: Interview a General Service Contractor or Convention Services Manager at a convention center. Use interview question sheet. Note this paper is due Nov. 3.
10/27	Exhibition Trends	Weekly Reading: Industry Article
11/3	Exhibition Best Practices and Trends	Video Slideshow: Attend an exhibition or tradeshow of your choice. Create a video slideshow using Animoto with written journal of your site visit. Post your video slideshow and journal on Blackboard by Nov. 10.
11/10	Study Time, review colleague's exhibition/tradeshow postings	Post your video journal and review colleague's posts.
11/17	Comprehensive Final Exam	Final Exam is available from 5 p.m. Thursday, Nov. 17, until 5 p.m. Wednesday, Nov. 23. Under NO circumstances will extensions be given to take exam.

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Syllabus Changes

As your instructor, I retain the right to make changes based on the timeline of the class, feedback from learners and/or logistical issues and will inform you as soon as a change is made.

Blackboard

Go to http://blackboard.matcmadison.edu. A Blackboard web site has been created for this class. You should check this site a few times a week for announcements, reminders and course information. You can access my PowerPoint slides or email me directly from this site.

Blackboard Support Information

- Go to http://matcmadison.edu/blackboard-help.
- Consult me if you need Blackboard support for this class.
- Computer difficulties are not a long-term excuse for non-participation. If you experience problems with your computer, call the computer help desk at 608-243-4444 or toll-free at 866-277-4445. They can talk you through fixing many problems.
- Madison College does its best to keep our Blackboard classroom up and running; however, despite our best efforts, Blackboard may go down unexpectedly. If you cannot access Blackboard, phone the student help desk at the number listed above. They can often resolve your problem over the phone.

Core Abilities

Madison College's Core Abilities are eight key life and success skills that contribute to the development of students as life-long learners on the job, at home and in the community. The core abilities are skills and abilities taught and assessed in classes, labs and field experiences at Madison College. In addition to specific job-related training, Madison College has identified core abilities that are transferable to go beyond the context of a specific course. For more information on Core Abilities, please visit http://matcmadison.edu/core-abilities. This class addresses the following core abilities: communication, critical thinking and mathematics.

Responsibilities and Policies

Student Responsibilities. Students are expected to be familiar with Madison College's policies and procedures. Many of the important policies and procedures are on the Madison College website, located at http://matcmadison.edu/student-rights-responsibilities.

Academic integrity is an expectation in all Madison College classes. Plagiarism, cheating and collusion are prohibited at Madison College. Plagiarism is defined as passing off another person's work as your own. Students who fail to observe these standards are subject to disciplinary action. Madison College has a strong policy on Academic Misconduct which is published on the Madison College website. Please refer to this page on the website to review all academic integrity and misconduct policies located at http://matcmadison.edu/academic-integrity.

Student Email. Madison College offers a student email account for all students. You are responsible for monitoring your student email account. This is the email account all course content will be used to communicate with you, so be sure and make sure you set it up and know now to log on. Student email can be accessed at http://stu.matcmadison.edu.

Academic Misconduct. The following list of forms of academic misconduct will not be tolerated in any way in this class:

1) Cheating: Use of an authorized "aid" while taking a test, having another person take an exam or quiz in the place of a student, stealing an examination, using group work as an individual student's work or unauthorized use of assistance from a lab or computer technician.

2) Fabrication: Falsifying data in laboratory results, inventing information for a report or falsifying citations to sources of information.

3) Facilitating Academic Dishonesty: Aiding another student in committing academic misconduct.

4) Interference: Stealing, changing, destroying or impeding another student's work. Impeding includes stealing, defacing or mutilating resources to deprive someone the use of resources.

5) Plagiarism: Using the ideas, words, or statements of another person without giving credit to that person. A student shall give credit to the works of others if the student uses another person's words, ideas, opinions or theories or borrows facts, statistics or other illustrative material unless the information is common knowledge.

6) Violation of Course Rules: A student shall follow course rules in the course syllabus when those rules are related to the course content or to the enhancement of the learning process in the course.

First time violations of the rules listed above will result in a "zero" for the assignment or quiz. Subsequent violations or egregious violations may result in an "F" for the course.

Withdrawal Policy. If a situation arises that prevents the successful completion of this course, please note that it is each student's responsibility to formally withdraw from this course.

Technical Assistance

The Student Computer Help Desk is located in the Truax Campus Library, Room 230. Student lab assistants are available in person and by phone at 608-243-4444 or toll-free at 866-277-4445 or by email at http://matcmadison.edu/student-helpdesk to provide computer support to fellow students. These services are available 7:30 a.m. - 9:00 p.m. Monday - Thursday, 7:30 a.m. - 4:30 p.m. Friday and 9 a.m. - 1 p.m. Saturday. In addition, students can call an after-hours help desk until 10 p.m. most days at 608-246-6666.

Disability Act Statement

Madison College complies with all provisions of the Americans with Disabilities Act and makes reasonable accommodations upon request. Please contact Disability Resources Services at 608-246-6716 (Students who are deaf via Relay 711), in Truax Room 159 or by email at drs@matcmadison.edu. If you have an accommodation card from that office indicating you have a disability that requires academic accommodations, please present it to me so we can discuss the accommodations that you might need in this class. It is best to request these accommodations at the beginning of, if not before, the first class so there is ample time to make the accommodations.

Other Resources

- Student Writing Center Assistance: 608-243-4289, http://matcmadison.edu/writing-center
- Peer-to-Peer Tutoring Services: 608-246-6453, http://matcmadison.edu/get-tutor
- Counseling Services: 608-246-6076, http://matcmadison.edu/counseling-services
- Advising and Career Resources: 608-246-6401, http://matcmadison.edu/contact-us-advising

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Category B. Project Management		
	Coordinate Level	**Manage Level**
Program Outcomes	Programs that cover project management at the coordinate level will provide graduates with knowledge and abilities that prepare them to provide input into and follow project plans for meeting or event and maintain flow of activities by ensuring key resources and personnel are in place.	Programs that cover project management at the manage level will provide graduates with knowledge and abilities that prepare them to manage meeting or event to achieve mission, goals, objectives and quality standards within the constraints of the meeting's scope, time and budget.
Course Outcomes (Refer to details in the standards to inform instruction or assessment)	Courses that cover project management at the coordinate level will provide graduates with knowledge and abilities that prepare them to: 1. Provide input into project plans using their knowledge of the meeting and creativity for the manager's consideration. 2. Follow the project plans to ensure activities contribute to achieving the meeting's goals and quality standards. 3. Maintain the flow of activities during the meeting by following the agreed-upon plans.	Courses that cover project management at the manage level will provide graduates with knowledge and abilities that prepare them to: 1. Develop a plan that will allow the project team to achieve the meeting's mission, goals and objectives. 2. Develop quality standards, policies and procedures to ensure the business event meets legal, regulatory, ethical and social requirements. 3. Develop a theme for the meeting that reflects stakeholders' expectations, branding and creativity. 4. Develop a procurement plan that provides guidelines for the project team to ensure necessary products and services are obtained within budget. 5. Establish milestones and a critical path for the meeting by identifying links, timelines and critical dates. 6. Develop a communication plan that specifies policies and procedures for information collection, distribution, document design, storage and security. 7. Develop evaluation/audit policies and procedures that incorporate critical success factors. 8. Manage critical path by continually monitoring for variances and implementing corrective action as needed. 9. Manage procurement process by developing RFPs, evaluating proposals, negotiating contracts and ensuring contractual obligations are met.
Foundation Knowledge and Abilities Needed for this Topic	• Project management—theory and key steps in process; policies and procedures • Computer skills—Excel and other software programs • On-site communication—protocols, equipment options and their advantages and disadvantages	

General Notes about Teaching and Assessment Strategies

- See "Meeting Complexity Variables and Scenario Templates" (see Appendix 10) to design less complex strategies and resources for the coordinate level and more complex strategies and resources for the manage level.

Summative Assessment Strategies	Resources
Have learners complete a sample project plan for an association meeting event given background information including the meeting's profile and parameters. The knowledge and abilities tested should reflect whether the course outcomes are at the coordinate or manage level and at what breadth and depth the topics were covered.	To be provided to learner as part of the case study assessment: • Sample event profile and parameters along with criteria that will be used to evaluate the project plan • Sample RFPs for display components and food and beverage services • Sample attendee satisfaction survey results • Sample supplier proposals
As an example, the learners could be asked to submit or present the following products as part of their project plan. • Meeting goals and objectives • Description of stakeholders and their requirements and involvement in the project management team • Meeting theme including rationale for selection of theme and how it ties to the event's goals and objectives • Sample critical path based on an 18-month planning cycle • Communication plan and flow chart that includes a list of key communication documents (budget, critical path, registration reports) along with who provides them, who receives them and how they are distributed • Two sample RFPs for display contractor and food and beverage service • An evaluation summary of a sample supplier proposal • An event specifications guide (ESG) for a basic one-day event using Excel including the following. o A schedule of meetings, food and beverage functions and breaks and details regarding meeting room assignments and what needs to be provided in each (audio-visual, display components) o A schedule of when all onsite details need to begin and end (registration desk, audio-visual set-ups, speaker rehearsals, food and beverage service) o Identification of project team member and venue and/or supplier contact responsible for each aspect of the event and a corresponding schedule • Report of recommendations for future meetings based on sample attendee satisfaction survey results	

Teaching and Formative Assessment Strategies	Resources (Relevant strategy)
Developing a project management plan (Skill 4) 1. Review what project management is, key steps in the process and why it is important to an event's success. Provide a sample project management plan and have learners identify ways that the plan would help meeting professionals achieve the meeting's mission, goals and objectives within the available timeframe and financial resources. Ask learners to identify the key areas where meeting professionals tasked with implementing a project plan could provide feedback to improve the project plan for next year's meeting. (Coordinate Level)	• Less complex sample project plan (1) • More complex sample project plan (2) • EM10-Event Phase and Process loop system (2) see Appendix 9 • Description of different components from a variety of event types (2) • Project planning tools and software and samples of tools created with them (3) • Examples of events where themes either matched or did not match event goals (4) • Description of event to be used for developing a theme (4) • List of common types of event suppliers (5) • Description of event and 2 sample RFPs for display and food and beverage services (5) • Sample 18-month planning cycle (6) • Sample of organizational structure for large corporation or association (7) • List of documents commonly shared between departments (7) • Electronic survey software (8) • List of event elements that are commonly evaluated (9) • Sample policies and procedures for event evaluation (9) • Data from attendee satisfaction survey (9)
2. Using a sample project management plan, review the components of the plan and factors that were considered in its development (historical data, stakeholders, type of meeting, and external factors such as destination, legislation and labor). Refer learners to the document that describes the event phase and process loop system to illustrate the multiple elements involved in meeting planning and their interrelatedness. Provide learners with different components for a variety of meeting types and ask them to describe how each component would affect the rest of the project plan. (Manage Level)	
3. Provide learners with samples of different types of project management tools and software. Provide examples and demonstrations about how these tools are used for event project management. Have learners translate parts of the sample project plan into a software program to create a planning tool such as Gantt charts. Collect learners' work and examples as prompts for a discussion about good practices and advantages and disadvantages of the different tools. (Manage Level)	
4. Discuss what a theme is and the importance of it matching the meeting's goals and objectives. Using oral and visual descriptions, provide examples where the theme matched the event and examples of where it did not and the outcomes in both situations. Discuss the factors (budget, target markets, stakeholder expectations and destination appeal and support) that need to be considered when selecting a theme. Lead a discussion on methods used for marketing and promotion, and budget permitting, how to integrate professional support such as marketing agencies, destination marketing organizations (DMO) and media. Have learners select a theme based on the description of a meeting and provide a rationale for their selection and how they would market it. (Manage Level)	
5. Present learners with a list of common meeting suppliers (venues, audio-visual, transportation, décor, housing, food and beverage and displays). Discuss the merits of outsourcing versus renting or purchasing equipment and services. Provide learners with examples of each. Review the procurement process including developing requests for proposals (RFPs), evaluating proposal submissions, vendor selection, reporting of rationale, contract negotiation, notification of contract awards, ethics and morals. Distribute and review a sample RFP. Present learners with a description of a real meeting event, including requirements for display components and food and beverage service. Have learners develop RFPs for the display components and food & beverage service. When completed, have them compare their own RFPs with the samples. (Manage Level)	

Teaching and Formative Assessment Strategies	Resources (Relevant strategy)
6. Present learners with an example of a meeting with an 18-month planning cycle for an annual event. Review the inter-dependence of each task against the event's objectives, budget, cash flow, risk, etc. Divide learners into 3 groups, each one assigned a different planning perspective (budget, program scheduling and marketing). Have groups outline an 18-month planning cycle from the perspective assigned and create a group summary (usually in Excel or Word) for grading. Compile the results of the projects to prepare a critique for a presentation and to facilitate discussion with learners. (Manage Level)	
7. Discuss communication plans, their components and why they're important to business event success and teamwork. Present learners with a sample organizational structure for large corporation or association. Discuss the priorities of the different roles and responsibilities in the organizational chart. For example, budget is a priority for the financial department, legislation is a priority for administration and promotions are a priority for the marketing department. Discuss how their different priorities are addressed through a communication plan. Distribute a list of documents (budget, marketing plan, event design, schedule) commonly shared between departments. Discuss various types of information management systems available (paper-based, databases, electronic files, shared networks). Using the sample document, have learners create a communication plan and flow chart describing to whom documents are sent and how. (Manage Level)	
8. Give a presentation about the type of information (timing, food, speakers) meeting professionals seek in order to evaluate attendee satisfaction and different ways data are collected (surveys in meeting package, table top surveys, post-event electronic surveys), their advantages and disadvantages and their suitability to different audiences. Describe one or two electronic survey options and their key features. Have learners develop an attendee satisfaction survey based on an event profile using electronic survey software. If possible, have learners attend an event and complete the attendee satisfaction surveys. Following the event, facilitate a discussion about the survey methods and questions and what the learners considered as strengths and areas needing improvement. (Coordinate Level)	
9. Present a list of elements (finances, event objectives, program, attendee feedback, registration) that are commonly evaluated during and after an event. Discuss the factors that determine success or failure for each element and illustrate how the weightings of these factors vary among events. Identify what information is typically collected for evaluations and in what format it is communicated. Provide a sample of policies and procedures that were created to guide the collection, analysis and reporting of evaluation results. Provide learners with data from an attendee satisfaction survey and have them make recommendations for changes to the next project plan based on those data. (Manage Level)	

Teaching and Formative Assessment Strategies	Resources (Relevant strategy)
Executing the project management plan (Skill 5) 1. Refer back to the information presented in Strategy 5 above (within Skill 4) about the process of evaluating proposals, reporting and developing rationale summaries. Provide a sample RFP and corresponding proposal and, using a rating sheet they've developed, have learners evaluate the proposal. (Coordinate Level)	• Sample RFP and sample proposal (1) • List of types of contracts (2) • Negotiation role play description (2) • Sample supplier contract (3) • A meeting professional with experience in negotiating and monitoring contracts (3) • Sample ESG (4) an ESG should be included in the sample project management plan used for Strategy 2, Skill 4
2. Display and review a list of types of contracts commonly required for meeting events (venue, food and beverage, audiovisual, speakers, entertainers). Lead a discussion about what is appropriate to negotiate (hotel rates), and what is not appropriate to negotiate (gratuities). Provide information about the negotiation processes and techniques. Break learners into groups of two to play the role of event professional and supplier. Have the pairs present the results of their negotiation role-playing and from there, create a document that describes recommendations for negotiating event contracts. (Manage Level)	
3. Review sample supplier contract with learners. Make note of key contents (deliverables, conditions, dates, prices). Invite a guest speaker to talk to learners about his/her experiences negotiating and monitoring contracts, as well as using professional legal opinions and services. Have learners prepare questions for the guest speaker in advance, and summarize key learning points from presentation afterwards. (Manage Level)	
4. Review a sample of a detailed event specifications guide (ESG, also known as an event internal) in Excel format and review. Discuss the importance of this document and how it is developed and updated during the event. Provide learners with sufficient information about an event to create their own specifications guide. (Manage Level)	

I. Site Management		
	Coordinate Level	**Manage Level**
Program Outcomes	Programs that cover site management at the Coordinate level will provide graduates with knowledge and abilities that prepare them to develop site specifications; assist with site layouts/ floor plans; set up, monitor and take down sites following logistics action plan; and obtain and monitor operation of onsite communication equipment.	Programs that cover site management at the Manage level will provide graduates with knowledge and abilities that prepare them to manage meeting site(s) by completing site inspections and selecting the best option; creating the site layouts/ floor plans; developing the logistics plan and monitoring the set-up, take-down and running of the meeting; and establishing onsite communication protocol.
Course Outcomes (Refer to details in the standards to inform instruction or assessment)	Courses that cover site management at the coordinate level will provide graduates with knowledge and abilities that prepare them to: 1. Develop site specification options that incorporate all identified requirements for manager's review. 2. Research and evaluate proposals from potential sites or venues using site specifications contained in RFP to make recommendations to manager. 3. Set up, monitor and take down sites following the logistics action plan provided by a manager to ensure activities are completed as specified. 4. Obtain the required onsite communication equipment to enable the sharing of information during set up, running and take down of the site.	Courses that cover site management at the manage level will provide graduates with knowledge and abilities that prepare them to: 1. Inspect recommended sites to determine how well each one matches the identified site specification criteria. 2. Select best site based on ratings, and develop rationale for choice(s). 3. Create site layout/floor plans to make the most efficient and effective use of facilities and space. 4. Develop logistics action plan to specify the appropriate sequencing and timing of activities required for set up, running and take down of site. 5. Monitor the set up, take down and running of the meeting to ensure a smooth execution of the logistics action plan. 6. Establish on-site communication protocol to clarify communication expectations for the project team.
Foundation Knowledge and Abilities Needed for this Topic	• Meeting or event design • Finance—budget • Computer skills—Excel and other software programs • Communication—negotiation • Project management—critical path, outsourcing, procurement process and contract management	
General Notes about Teaching and Assessment Strategies • See "Meeting Complexity Variables and Scenario Templates" (see Appendix 10) to design less complex resources or activities for the coordinate level and more complex resources or activities for the manage level.		

Summative Assessment Strategies	Resources
Have learners complete a case study that tests their ability to select and manage a site. The case study directions should provide learners with the required background information about the meeting, including a supplier RFP and at least two proposals. The knowledge and abilities tested should reflect whether the course outcomes are at the coordinate or manage levels and at what breadth and depth the topics were covered. Learners could be asked to produce and present the following products in response to the case study. • Site selection criteria • Completed proposal rating sheet • Rationale report for site selection (or role play) • Set-up and take-down logistics plans • Manifest of items that need to be brought on site to produce meeting • Selection of onsite communication equipment and placement of arrangements into an existing critical path Assessment criteria for the knowledge and abilities tested in the case study can be found in the *MBECS* skills 22-25.	Site management case study that includes and RFP and at least 2 proposals

Summative Assessment Strategies	Resources (Relevant strategy)
Site selection (Skill 22) 1. As an introduction to the topic, provide information about what site management is, why it is important and the roles of team members. Present learners with background information about different components of site management including site selection, site layout, onsite management during the meeting and onsite communication. After the presentation, ask learners questions to reinforce key learning points. (Coordinate Level)	• Property information packages (2) • Sample RFPs (2) • Sample proposal that responds to sample RFP (3) • Sample rating sheet with criteria for each requirement along with an assigned weighting for each requirement (3) • Tools needed for site inspection such as floor plan drawings provided by venue, comfort calculator, site inspection spreadsheet (with day, date, time, room, function, set up, number of people), electronic measuring device (or large industrial style measuring tape) and digital camera (4) • Samples of different types of rationale reports (5) Sample meeting contracts (6) Role play scenario for negotiating contracts (6) Sample ingress and egress schedules (7)
2. Explain to learners how meeting requirements are often communicated to potential suppliers through a request for proposals (RFPs). Present learners with a sample RFPs for different types of meeting profiles and informally discuss to what extent two or three different sites match the selection criteria in the RFPs. Discuss possible distribution channels for RFPs and identify benefits and protocols. Have learners develop a site rating sheet based on the selection criteria in the RFP and then fill out the rating sheet based on the information provided on the venue's website. (Coordinate Level)	
3. Do a presentation about the review process for proposals and how to use a rating sheet. Provide learners with a sample proposal and a sample rating sheet. Explain to learners the tasks involved in the rating process, what team members are typically responsible for these tasks and the types of research conducted. Have learners research the site described in the proposal using the Internet and fill in rating sheet. (Coordinate Level)	

Summative Assessment Strategies	**Resources** (Relevant strategy)
4. Describe the importance of site visits to the proposal rating process and the important additional information that can be gained from them (staff service levels, organizational culture and ethics, rapport, cleanliness, creativity). Have learners develop a site inspection spreadsheet with required meeting components, and then provide learners with feedback. Have students use their revised spreadsheets to complete virtual site inspections on a venue website or, if possible, by taking a field trip to a site. After the site visit, have learners add notes to the rating sheet and then determine the final rating of short-listed properties to choose the best option. (Manage Level) *Suggestion for field trip to site: Visit each function area and verify its paper-accuracy against the physical space, taking note of factors such as location of windows, black-out techniques for AV, noise transference factors in adjoining rooms or those partitioned by air-walls, access to power, lighting control panels, HVAC control, irregular floor plan jogs that may not appear on floor plans, ceiling height, projection capabilities (front, rear or flown), distance to elevators, accessibility options for persons with disabilities, access and the adequacy of the number of washrooms. Visit loading dock and ensure accessibility via incoming and outgoing routes, plus adjacency to, and adequacy of, storage space for pre- and post-shipments. Have learners record findings on site inspection spreadsheet, in notes and with digital photos (if allowed).*	
5. Review different types of rationale reports with learners. Explain how meeting professionals use ratings, notes and photos from site visits to rationalize final selection from the short-listed proposals. Discuss variances in the content of rationale reports according to their purpose and audience. Have learners write a rationale report based on a completed rating sheet, possibly from Strategy 4 above. (Manage Level)	
6. Do a presentation about contract options for venue or site suppliers (room rates, comp rooms, Internet access, sponsorship) that are negotiable. Have learners role play a meeting professional negotiating a contract with a venue sales manager. (Manage Level) *This teaching strategy could be taught in conjunction with or build on courses that covered contracts (see Category B. Project Management, sub-skill 5.02).*	
7. Describe and provide samples of ingress (move-in) and egress (move-out) schedules and the importance of reviewing these with the venue representative to ensure availability of space and staff to accomplish an effective in-and-out. (Coordinate Level)	

Summative Assessment Strategies	Resources (Relevant strategy)
Site layout (Skill 23) 1. Define comfort calculations (space per person for different types of setups and meeting purposes), how they are used and how venues differ in their calculation of space. Have learners perform comfort calculations to answer questions such as "How many square feet are required to accommodate 100 people reception style?" "How many square feet are required for a 100-booth trade show in which each booth is 10' x 10'?" (Coordinate Level)	• Comfort calculation tool for each learner (1, 2) • Scenarios for comfort calculations (1, 2) • Computers with software for developing spreadsheets for learners (3) • Samples of published venue floor plans (4) • Specifications for square footage of rooms and various set-up styles (4) APEX or Meeting Room Template software (4 and 5) Examples of software programs for creating to-scale floor plans (5)
2. Give learners various scenarios providing a range of configuration requirements (concurrent and plenary sessions with room set-up recommendations). Describe how configurations need to connect to meeting plan and program. Have learners create different configurations of layouts. Provide feedback. (Manage Level)	
3. Do a presentation about the information needed to monitor space allocations and configuration changes during planning and production, the types of changes that often occur and how these affect other aspects of the meeting. Have learners create their own spreadsheets with the required components for tracking space allocation (day, date, time, room, function, set up required, number of people). Discuss and provide feedback. (Manage Level)	
4. Present and discuss types of traditional and non-traditional sites and the nature of site diagrams created by venues. Discuss the need for quality assurance (such as accuracy of layout) and what tasks that might include. Using APEX or meeting room template software, have learners create their own versions of to-scale floor plans with the square footage and room set-up style provided by instructor. Have learners compare their floor plan with the version provided by the venue. This will verify the accuracy of venue floor plans and show learners the process, and the importance, of double-checking floor plans for possible variances that could greatly impact the set up of the meeting. (Manage Level)	
5. Present a range of preferred software tools for creating floor plans (actual to-scale diagrams) for different purposes. Have learners practice creating floor plans using one or two of these tools. (Manage Level)	

Summative Assessment Strategies	Resources (Relevant strategy)
Site management (Skill 24) 1. Give a presentation about the components of a logistics action plan for set up and take down, including examples of different set-up and take-down scenarios based on different types of sites and meetings (location, access, union regulations, preferred suppliers). Provide learners with descriptions of different set-up and take-down scenarios and have them identify possible problems and solutions. (Coordinate Level)	• Descriptions of different set-up and take-down scenarios (1) • Guest speakers—union representative, meeting professional and venue representative (2) • Background information for set-up and take-down activities such as meeting profile, floor plan and logistics plan (3) • Problem scenarios and solutions for instructor's presentation about on-site meeting production (4) • Problem scenarios for learners to solve (4) • Sample tracking manifest for shipping and receiving (5) • Description of a meeting that learners will use to create a tracking manifest (5) • Meeting professionals willing to have learners attend one of their meetings as observers and then be interviewed after (6)
2. Elaborate on factors that need to be considered when working with sites and suppliers with union employees. Discuss union contract conditions that impact meeting set up, implementation, take down and budget. Invite guest speakers to class to present the perspectives of unions, meeting professionals, and venue managers. Have learners prepare questions for guest speakers and facilitate a group discussion following their presentations to highlight key points. (Manage Level)	
3. Provide learners with a meeting profile, floor plan and logistics plan. Have the learners use these documents to complete a meeting set up and take down in a multi-purpose room at the institution. (Coordinate Level)	
4. Describe problem scenarios that could take place during a meeting and describe appropriate actions or decisions that solved them. Provide learners with additional scenarios and have them generate solutions in small groups. (Coordinate Level)	
5. Give a presentation on the importance of and procedures for shipping and receiving, storage, and drayage (the transfer of exhibit pieces from the point of arrival to the exhibit site). Provide a sample tracking manifest for shipping and receiving. Provide learners with a description of a meeting and have them create a tracking manifest for items that need to be brought onsite. (Coordinate Level)	
6. Have learners attend a meeting to observe factors such as traffic flow, effectiveness of room layout and cooperation of venue staff and suppliers with the meeting professional. Have learners document experience with photos (if appropriate), take notes and identify question for a post-event interview with the meeting professional. Then have them give a presentation highlighting key knowledge gained from experience. (Coordinate Level)	

Summative Assessment Strategies	Resources (Relevant strategy)
Onsite communication (Skill 25) 1. Have learners research different types of onsite communication tools used by meeting professionals (two-way radios, land-line phones, cell phones, text messages, emails) and describe the issues, advantages and disadvantages of each (two-way radios: headsets/no headsets; noise, interruption, privacy) and in what situations they are appropriate. Have learners present the highlights of their research results to the class and demonstrate the use of any tools that other learners are not familiar with. As learners give presentations, identify opportunities to discuss various protocols that could affect the use of each type of communication tool and share some real-life examples of gaffes in protocol, policies and overall communication onsite. Discuss how the gaffes were addressed and how they could have been avoided. (Manage Level)	• On-site communication tools for demonstrations (1) • Two sets of scenarios of different types of clients and meeting attendees—one for illustration and one for learner activity (3) • Sample critical path and onsite time frame (4)

Summative Assessment Strategies	**Resources** (Relevant strategy)
2. Have learners also research possible local sources for onsite communication equipment (where it can be bought, rented or borrowed onsite). Have learners document equipment features and costs. (Coordinate Level)	
3. Provide scenarios of the different demographics of clients and meeting attendees and discuss how the communication technology chosen needs to be appropriate for their levels of technological proficiency. Provide additional scenarios and have learners suggest the appropriate communication technology for those particular clients and meeting attendees. Have learners research and identify innovative technology that may be used in a meeting situation and identify benefits and challenges. Review impact of selection on other meeting components such as budget. (Manage Level)	
4. Working with a sample critical path, show learners how to build arrangements for the delivery and return of communication equipment into the onsite time frame, noting specific location and ensuring adequate time for charging equipment (if required). Have learners brainstorm potential problems that could come up related to the delivery of communication equipment and potential solutions. (Coordinate Level)	

Appendix 8A: Checklist for Breadth & Depth of *MBECS* in Curriculum Review

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Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
A. STRATEGIC PLANNING	1. Manage Strategic Plan for Meeting or Event	1.01 Develop mission goals & objectives			
		1.02 Determine feasibility of meeting or event			
		1.03 Determine requirements to carry out meeting/ event			
		1.04 Develop financial summary			
		1.05 Monitor strategic plan			
	2. Develop Sustainability Plan for Meeting or Event	2.01 Implement sustainability management plan			
		2.02 Demonstrate environmental responsibility			
	3. Measure Value of Meetings and Business Events	3.01 Develop evaluation plan			
		3.02 Measure return on investment			
		3.03 Evaluate/audit meeting or event			
		3.04 Evaluate effectiveness of risk management plan			
B. PROJECT MANAGEMENT	4. Plan Meeting or Event	4.01 Develop project plan			
		4.02 Develop quality standards, policies, procedures			
		4.03 Develop theme for event			
		4.04 Develop procurement plan			
		4.05 Establish milestones and critical path			
		4.06 Develop integrated communication plan			
		4.07 Develop evaluation/audit procedures			
	5. Manage Meeting or Event Project	5.01 Manage critical path			
		5.02 Manage contracts			
		5.03 Manage running of meeting or event			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
C. RISK MANAGEMENT	6. Manage Risk Management Plan	6.01 Identify risks			
		6.02 Analyze risks			
		6.03 Develop management and implementation plan			
		6.04 Develop and implement emergency response plan			
		6.05 Arrange security			
D. FINANCIAL MANAGEMENT	7. Develop Financial Resources	7.01 Manage sponsorship process			
		7.02 Manage donor process			
		7.03 Manage program funding process			
		7.04 Manage registration process			
	8. Manage budget	8.01 Develop budget			
		8.02 Establish pricing			
		8.03 Establish financial controls and procedures			
		8.04 Manage cash flow			
		8.05 Monitor budget performance			
		8.06 Revise budget			
	9. Manage Monetary Transactions	9.01 Establish cash handing procedures			
		9.02 Monitor cash handling procedures			
E. ADMINISTRATION	10. Perform Administrative Tasks	10.01 Coordinate office administration			
		10.02 Manage information system			
		10.03 Write reports			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
F. HUMAN RESOURCES	11. Manage Human Resource Plan	11.01 Determine workforce requirements			
		11.02 Establish workforce policies and procedures			
		11.03 Develop training plan			
		11.04 Monitor human resources plan			
	12. Acquire Staff and Volunteers	12.01 Develop selection criteria			
		12.02 Recruit staff and volunteers			
		12.03 Interview candidates			
		12.04 Select best candidate and offer position			
	13. Train Staff and Volunteers	13.01 Provide orientation			
		13.02 Provide training			
	14. Manage Workforce Relations	14.01 Supervise staff and volunteers			
		14.02 Motivate staff and volunteers			
		14.03 Manage teams			
		14.04 Evaluate staff			
		14.05 Process terminations and resignations			
G. STAKEHOLDER MANAGEMENT	15. Manage Stakeholder Relationships	15.01 Identify stakeholders			
		15.02 Assess stakeholders			
		15.03 Classify stakeholders			
		15.04 Manage stakeholder activities			
		15.05 Manage stakeholder relationship			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
H. MEETING OR EVENT DESIGN	16. Design Program	16.01 Determine program components			
		16.02 Select program content and delivery formats			
	17. Engage Speakers and Performers	16.03 Structure and sequence program components			
		17.01 Determine event requirements for speakers and performers			
		17.02 Develop selection criteria			
		17.03 Select candidates			
		17.04 Secure contracts and communicate expectations			
	18. Coordinate Food and Beverage Services	18.01 Determine food & beverage service requirements			
		18.02 Select menu(s)			
		18.03 Plan service style(s)			
		18.04 Select food and beverage provider(s)			
		18.05 Manage alcohol service			
	19. Design Environment	19.01 Establish functional requirements			
		19.02 Select decor and furnishings			
		19.03 Coordinate meeting or event signage			
	20. Manage Technical Production	20.01 Determine requirements for staging and technical equipment			
		20.02 Acquire staging and technical equipment			
		20.03 Install staging and technical equipment			
		20.04 Oversee technical production operation			
	21. Develop Plan for Managing Movement of Attendees	21.01 Develop admittance credential systems			
		21.02 Select crowd management techniques			
		21.03 Coordinate accommodation and transportation			
		21.04 Manage protocol requirements			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
I. SITE MANAGEMENT	22. Select Site	22.01 Determine site specifications			
		22.02 Identify and inspect sites			
	23. Design Site Layout	2.01 Design site layout			
	24. Manage Meeting or Event Site	24.01 Create logistics action plan for set-up & take-down			
		24.02 Set up site			
		24.03 Monitor site during meeting or event			
		24.04 Take down site			
	25. Manage On-site Communication	25.01 Establish communications framework			
		25.02 Determine & acquire required communication equipment			
		25.03 Specify communication procedures and protocols			
J. MARKETING	26. Manage Marketing Plan	26.01 Conduct situational analysis			
		26.02 Define target market segments			
		26.03 Develop branding for meeting or event			
		26.04 Select marketing distribution channels			
		26.05 Develop integrated marketing strategy			
		26.06 Implement marketing plan			
	27. Manage Marketing Material	27.01 Determine marketing materials needed for event			
		27.02 Develop content and design parameters			
		27.03 Produce marketing materials			
		27.04 Distribute marketing materials			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
J. MARKETING (cont.)	28. Manage Meeting or Event Merchandise	28.01 Develop product(s) design and specifications			
		28.02 Determine pricing			
		28.03 Control brand integrity			
		28.04 Produce merchandise			
		28.05 Distribute merchandise			
		28.06 Coordinate hospitality			
	29. Promote Meeting or Event	29.01 Develop advertising plan			
		29.02 Develop cross-promotional activities			
		29.03 Develop contests			
		29.04 Coordinate sale promotion			
	30. Contribute to Public Relations Activities	30.01 Contribute to public relations strategy			
		30.02 Contribute to publicity plan			
		30.03 Develop media relations			
		30.04 Contribute to implementation of publicity plan			
		30.05 Manage crises and controversies			
	31. Manage Sales Activities	31.01 Develop sales plan and objectives			
		31.02 Conduct sales activities			
		31.03 Determine sales platforms			
K. PROFESSIONALISM	32. Exhibit Professional Behavior	32.01 Project a professional image			
		32.02 Demonstrate leadership			
		32.03 Demonstrate ethical behavior			
		32.04 Work with colleagues			
		32.05 Work in a diverse environment			
		32.06 Manage time			
		32.07 Manage stress			
		32.08 Make decisions			
		32.09 Solve problems			
		32.10 Keep up to date w/ changes in meetings/ event industry			
		32.11 Facilitate continuous improvement			
		32.12 Participate in professional development activities			

Category	Skill (breadth)	Sub-skills (depth)	Include	Don't Include	Include in next revision
L. COMMUNICATION	33. Conduct Business Commun-ications	33.01 Communicate verbally			
		33.02 Communicate in writing			
		33.03 Use communication tools			
		33.04 Make effective presentations			
		33.05 Plan and conduct meetings			
		33.06 Establish and conduct business relationships			

SUMMARY	
No. of skills/sub-skills included in our curriculum	
Additional sub-skill areas to incorporate in program revision	

Using Template C for a Manage Level Program

Option 1: At a consolidated level (focus on skills):

1. Look at a skill listed in the category (Skill 1 in A. Strategic Planning).
2. Consider knowledge ratings for each sub-skill. Note whether your program covers all the required knowledge content (sub-skills) and knowledge rating for "manage." List courses and course outcome(s) that cover the *MBECS* sub-skills, and note the K rating for your program. (Sub-skills identified at the coordinate level would be incorporated into the manage program at that level, or could be required as pre-requisites. Sub-skills identified at the "direct" level would need outcomes at the manage level in your program.)
3. Consider performance ratings for each sub-skill detail for the skill. Note whether your program covers the competencies at the rated level, or note your program outcome level rating.
4. Summarize your program for the category in the summary table provided.
5. Identify any areas of your program you wish to enhance or increase in your revision.
6. Note if you feel your program is equivalent to the stated curriculum levels for this category.

Option 2: At detailed level (focus on sub-skills)

1. Read each sub-skill listed in the skill.
2. List any courses and course outcomes that you feel cover that sub-skill. Note whether your course(s) cover the sub-skill at the knowledge rating of the *MBECS* or at a lower level (note your level).
3. For sub-skills identified at the direct level in the *MBECS* curriculum, note whether your program rating is at a K 4 or 5 level, applicable for an undergraduate manage program.
4. Note whether your course(s) cover the sub-skill at the performance level rating of the *MBECS*, or at a lower level (note your level)
5. Summarize your program for the category in the table provided.
6. Identify any areas of your program you wish to enhance or increase in your revision.
7. Note if you feel your program is equivalent to the stated curriculum levels for this category.

NOTE: These details may provide important evidence of incorporation of industry competency standards for program articulation, credit transfer or accreditation processes.

[1]Ratings criteria according to adapted Bloom's taxonomy can be found in chart in Appendix 2

Importance: 1-5 (5 being highest) • **Knowledge & Performance Levels:** 1-6 (6 being highest and most complex)
Ratings definitions are found in Appendix 5.

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	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
A. STRATEGIC PLANNING	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
Skill 1. Manage Strategic Plan for Meeting or Event	8 yrs	5						
1.01 Develop mission goals & objectives			Direct	6	6			
1.02 Determine feasibility of meeting or event			Manage	5	3			
1.03 Determine requirements to carry out meeting/eve			Manage	5	3			
1.04 Develop financial summary			Coordinate	3	4			
1.05 Monitor strategic plan			Direct	5	4			
Overall skill equivalency for Skill 1				Av 5	Av 4			
Skill 2. Develop Sustainability Plan for Meeting or Event	5 yrs	4						
2.01 Implement sustainability management plan			Direct	6	6			
2.02 Demonstrate environmental responsibility			Direct	6	4			
Overall skill equivalency for Skill 2				Av 6	Av 5			
Skill 3. Measure Value of Meetings and Business Events	8 yrs	5						
3.01 Develop evaluation plan			Direct	6	6			
3.02 Measure return on investment			Manage	4	5			
3.03 Evaluate/audit meeting or event			Direct	5	4			
3.04 Evaluate effectiveness of risk management plan			Direct	5	4			
Overall skill equivalency for Skill 3				Av 5	Av 5			

This step will be necessary for proof of equivalency in program articulation, credit transfer and possibly accreditation process.

	Context Rating	Curriculum exit level	Blooms Taxonomy	Our Program	
A. STRATEGIC PLANNING : Our program summary				3 Skills	11 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.					
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.					
Number of the *MBECS* skills that are not incorporated in our curriculum.					
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.					
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.					
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.					
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.					
Average performance rating of our program for skills (performance) in this category.					
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)					
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).					

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
B. PROJECT MANAGEMENT	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
Skill 4. Plan Meeting or Event								
4.01 Develop project plan			Direct	6	4			
4.02 Develop quality standards, policies, procedures			Direct	6	4			
4.03 Develop theme for event			Direct	6	4			
4.04 Develop procurement plan	3 yrs	5	Direct	6	3			
4.05 Establish milestones and critical path			Direct	6	4			
4.06 Develop integrated communication plan			Direct	6	4			
4.07 Develop evaluation/audit procedures			Direct	6	4			
Overall skill equivalency for Skill 4				Av 6	Av 4			
Skill 5. Manage Meeting or Event Project								
5.01 Manage critical path			Manage	5	4			
5.02 Manage contracts	5 yrs	5	Manage	5	4			
5.03 Manage running of meeting or event			Manage	3	4			
Overall skill equivalency for Skill 5				Av 4	Av 4			

B. PROJECT MANAGEMENT: Our program summary	2 Skills	10 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
C. RISK MANAGEMENT	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
6. Manage Risk Management Plan	8 yrs	5						
6.01 Identify risks			Mange	3	4			
6.02 Analyze risks			Direct	5	4			
6.03 Develop management and implementation plan			Direct	6	5			
6.04 Develop and implement emergency response plan			Direct	6	5			
6.05 Arrange security			Coordinate	3	3			
Overall skill equivalency for Skill 6				Av 5	Av 4			

C. RISK MANAGEMENT: Our program summary	1 Skills	5 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
D. FINANCIAL MANAGEMENT	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
7. Develop Financial Resources								
7.01 Manage sponsorship process	5 yrs	5	Direct	5/6	5			
7.02 Manage donor process			Direct	6	4			
7.03 Manage program funding process			Direct	5/6	6			
7.04 Manage registration process			Manage	4	4			
Overall skill equivalency for Skill 7				Av 5	Av 5			
8. Manage Budget								
8.01 Develop budget	3 yrs	5	Manage	4	4			
8.02 Establish pricing			Direct	6	4			
8.03 Establish financial controls and procedures			Manage	4	4			
8.04 Manage cash flow			Manage	4	3			
8.05 Monitor budget performance			Manage	4	3			
8.06 Revise budget			Manage	4	4			
Overall skill equivalency for Skill 8				Av 4	Av 4			
9. Manage Monetary Transactions								
9.01 Establish cash handing procedures	1 yr	3	Coordinate	3	3			
9.02 Monitor cash handling procedures			Coordinate	3	3			
Overall skill equivalency for Skill 9				Av 3	Av 3			

D. FINANCIAL MANAGEMENT: Our program summary	3 Skills	12 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
E. ADMINISTRATION	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
10. Perform Administrative Tasks	2 yrs	3						
10.01 Coordinate office administration			Manage	4	4			
10.02 Manage information system			Manage	5	4			
10.03 Write reports			Manage	5	4			
Overall skill equivalency for Skill 10				Av 5	Av 4			

E. ADMINISTRATION: Our program summary	1 Skills	3 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
F. HUMAN RESOURCES	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
11. Manage Human Resource Plan	5 yrs	5						
11.01 Determine workforce requirements			Manage	5	5			
11.02 Establish workforce policies and procedures			Direct	6	4			
11.03 Develop training plan			Direct	6	4			
11.04 Monitor human resources plan			Manage	5	3			
Overall skill equivalency for Skill 11				Av 6	Av 4			
12. Acquire Staff and Volunteers	3 yrs	4						
12.01 Develop selection criteria			Direct	6	4			
12.02 Recruit staff and volunteers			Manage	5	4			
12.03 Interview candidates			Manage	3	4			
12.04 Select best candidate and offer position			Manage	5	4			
Overall skill equivalency for Skill 12				Av 5	Av 4			
14. Manage Workforce Relations	10 yrs	5						
14.01 Supervise staff and volunteers			Manage	5	5			
14.02 Motivate staff and volunteers			Manage	5	5			
14.03 Manage teams			Direct	6	5			
14.04 Evaluate staff			Manage	5	4			
14.05 Process terminations and resignations			Manage	2	3			
Overall skill equivalency for Skill 14				Av 5	Av 4			

F. HUMAN RESOURCES: Our program summary	4 Skills	15 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
G. STAKEHOLDER MANAGEMENT	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
15. Manage Stakeholder Relationships	7 yrs	5						
15.01 Identify stakeholders			Coordinate	2	3			
15.02 Assess stakeholders			Manage	4	4			
15.03 Classify stakeholders			Manage	4	4			
15.04 Manage stakeholder activities			Manage	3	5			
15.05 Manage stakeholder relationship			Direct	5	5/6			
Overall skill equivalency for Skill 15				Av 4	Av 4			

G. STAKEHOLDER MANAGEMENT: Our program summary	1 Skills	5 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
H. MEETING OR EVENT DESIGN	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
16. Design Program	5 yrs	5						
16.01 Determine program components			Manage	4	6			
16.02 Select program content and delivery formats			Direct	6	6			
16.03 Structure and sequence program components			Manage	4	5			
Overall skill equivalency for Skill 16								
17. Engage Speakers and Performers	2 yrs	3						
17.01 Determine event requirements for speakers and performers			Manage	5	3			
17.02 Develop selection criteria			Manage	3	3			
17.03 Select candidates			Manage	2	3			
17.04 Secure contracts and communicate expectations			Manage	5	4			
Overall skill equivalency for Skill 17								
18. Coordinate Food and Beverage Services	3 yrs	5						
18.01 Determine food & beverage service requirements			Manage	5	4			
18.02 Select menu(s)			Manage	3	3			
18.03 Plan service style(s)			Coordinate	2	3			
18.04 Select food and beverage provider(s)			Manage	3	3			
18.05 Manage alcohol service			Manage	3	4			
Overall skill equivalency for Skill 18								

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
H. MEETING OR EVENT DESIGN *(continued)*	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
19. Design Environment	5 yrs	4						
19.01 Establish functional requirements			Direct	6	6			
19.02 Select decor and furnishings			Manage	4	3			
19.03 Coordinate meeting or event signage			Coordinate	2	3			
Overall skill equivalency for Skill 19								
20. Manage Technical Production	5 yrs	4						
20.01 Determine requirements for staging and technical equipment			Manage	5	4			
20.02 Acquire staging and technical equipment			Manage	3	3			
20.03 Install staging and technical equipment			Manage	3	3			
20.04 Oversee technical production operation			Manage	3	3			
Overall skill equivalency for Skill 20								
21. Develop Plan for Managing Movement of Attendees	3 yrs	4						
21.01 Develop admittance credential systems			Manage	5	3			
21.02 Select crowd management techniques			Manage	5	4			
21.03 Coordinate accommodation and transportation			Manage	3	3			
21.04 Manage protocol requirements			Coordinate	2	3			
Overall skill equivalency for Skill 21								

H. MEETING OR EVENT DESIGN: Our program summary	6 Skills	23 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
I. SITE MANAGEMENT	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
22. Select Site	3 yrs	5						
22.01 Determine site specifications			Manage	3	3			
22.02 Identify and inspect sites			Manage	5	3			
Overall skill equivalency for Skill 22								
23. Design Site Layout	3 yrs	5						
23.01 Design site layout			Manage	3	5			
Overall skill equivalency for Skill 23								
24. Manage Meeting or Event Site	6 yrs	5						
24.01 Create logistics action plan for set-up & take-down			Manage	5	3			
24.02 Set up site			Coordinate	3	3			
24.03 Monitor site during meeting or event			Coordinate	3	3			
24.04 Take down site			Coordinate	3	3			
Overall skill equivalency for Skill 24								
25. Manage On-site Communication	3 yrs	5						
25.01 Establish communications framework			Manage	3	4			
25.02 Determine & acquire required communication equipment & resources			Coordinate	3	3			
25.03 Specify communication procedures and protocols			Coordinate	3	3			
Overall skill equivalency for Skill 25								

I. SITE MANAGEMENT: Our program summary	4 Skills	10 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
J. MARKETING	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
26. Manage Marketing Plan								
26.01 Conduct situational analysis			Direct	6	5			
26.02 Define target market segments			Manage	5	4			
26.03 Develop branding for meeting or event	7 yrs	5	Direct	6	4			
26.04 Select marketing distribution channels			Manage	5	3			
26.05 Develop integrated marketing strategy			Direct	6	6			
26.06 Implement marketing plan			Manage	4	4			
Overall skill equivalency for Skill 26								
27. Manage Marketing Material								
27.01 Determine marketing materials needed for event			Manage	3	4			
27.02 Develop content and design parameters	3 yrs	3	Direct	6	4			
27.03 Produce marketing materials			Manage	3	3			
27.04 Distribute marketing materials			Coordinate	2	3			
Overall skill equivalency for Skill 27								
28. Manage Meeting or Event Merchandise								
28.01 Develop product(s) design and specifications			Direct	6	4			
28.02 Determine pricing	2 yrs	2	Manage	5	4			
28.03 Control brand integrity			Manage	5	4			
28.04 Produce merchandise			Coordinate	3	3			
28.05 Distribute merchandise			Coordinate	2	3			
28.06 Coordinate hospitality			Coordinate	3	3			
Overall skill equivalency for Skill 28								

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
J. MARKETING *(continued)*	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
29. Promote Meeting or Event	5 yrs	5						
29.01 Develop advertising plan			Direct	6	4			
29.02 Develop cross-promotional activities			Direct	6	4			
29.03 Develop contests			Manage	4	4			
29.04 Coordinate sale promotions			Manage	3	4			
Overall skill equivalency for Skill 29								
30. Contribute to Public Relations Activities	5 yrs	4						
30.01 Contribute to public relations strategy			Direct	6	4			
30.02 Contribute to publicity plan			Manage	3	4			
30.03 Develop media relations			Manage	5	5			
30.04 Contribute to implementation of publicity plan			Manage	4	4/5			
30.05 Manage crises and controversies			Direct	6	6			
Overall skill equivalency for Skill 30								
31. Manage Sales Activities	7 yrs	5						
31.01 Develop sales plan and objectives			Manage	5	4			
31.02 Conduct sales activities			Manage	3	5			
31.03 Determine sales platforms			Manage	3	5			
Overall skill equivalency for Skill 31								

J. MARKETING: Our program summary	6 Skills	28 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
K. PROFESSIONALISM	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
32. Exhibit Professional Behaviour	NA	NA				Interwoven throughout levels		
32.01 Project a professional image								
32.02 Demonstrate leadership								
32.03 Demonstrate ethical behaviour								
32.04 Work with colleagues								
32.05 Work in a diverse environment								
32.06 Manage time								
32.07 Manage stress								
32.08 Make decisions								
32.09 Solve problems								
32.10 Keep up to date w/ changes in meetings/event industry								
32.11 Facilitate continuous improvement								
32.12 Participate in professional development activities								

K. PROFESSIONALISM: Our program summary	1 Skills	12 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

	Context Rating		Curriculum exit level	Blooms Taxonomy		Our Program		
L. COMMUNICATION	TIME TO MASTER	IMPORTANCE		KNOWLEDGE	PERFORMANCE (Ability)	List courses (and outcomes) that cover skill/sub-skills	Similar K level? Yes/No	Similar P level? Yes/No
33. Conduct Business Communications			All levels			Interwoven throughout program		
33.01 Communicate verbally								
33.02 Communicate in writing								
33.03 Use communication tools								
33.04 Make effective presentations								
33.05 Plan and conduct meetings								
33.06 Establish and conduct business relationships								

L. COMMUNICATION: : Our program summary	1 Skills	6 Sub-skills
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels.		
Number of the *MBECS* skills that are not incorporated in our curriculum.		
Number of the *MBECS* sub-skills that our curriculum has substantially equivalent outcomes in K levels at the manage rating or above.		
Number of the *MBECS* sub-skills that our curriculum introduces but does not have substantially equivalent outcomes in K levels at the manage rating.		
Number of the *MBECS* sub-skills that are not incorporated into our curriculum at all.		
Number of the *MBECS* skills that our curriculum has substantially equivalent outcomes in P ratings.		
Average performance rating of our program for skills (performance) in this category.		
Note which of the above *MBECS* skills and sub-skills might be included in our curriculum revision, based on our program/course purpose and overall outcomes desired. (List)		
Based on the comparison above, we consider our program outcomes to be equivalent to the *MBECS* at the manage level for the following skills in this category (note if in K only, or in K and P).		

Summary Results

- Skills areas that are substantially equivalent to our outcomes in both K and P (levels)
- Skills that are substantially equivalent to our outcomes in K, but not P
- Skills/sub-skills that are not substantially equivalent to our outcomes in either K or P
- Skills/sub-skills from the *MBECS* that are not incorporated into our curriculum

Identify which of the above might be included in a curriculum revision, based on analysis of each category.

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EM10 - Event Phase & Process 'loop system'

Janet Landey CSEP

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INSTITUTE OF EVENTS MANAGEMENT - EM10 - Event Phase & Process 'loop system'

PHASES	ELEMENTS				INPUT	ASSESS	SELECT	MONITOR	INTEGRATE	DOCUMENT	OUTPUT
Initiation	Mission	Goals	Objectives	Sustainability Plan	Good Idea						Event Concept
	Environmental Responsibility	Professionalism	Ethical Behaviour	Diversity							
	Teamwork	Time	Stress	Decisions							
	Problem Solving	Continuous Professional Development	Communication	Presentation Skills							
	Business Relationships		Professional Associations	Leadership							
Initiation	Feasibility	Situational Analysis	Define Target Market Profile	Theme Content & Design	Event Concept						Event Feasibility
	Stakeholders - Identify, Assess, Classify	Event Requirements / Resources	Integrated Communication Plan/ Framework	Marketing Strategy/ Medium							
	Identify Risk	Milestones & Critical Path	Sponsorship Process	Donor Process							
	Financial Summary	Programme Funding	Evaluation & Audit Process	Project Plan							
	Procurement Plan	HR Plan	Quality Management Systems	Policies & Procedures							
Initiation	Artistic & Functional Requirements	Programme Components	Programme Content	Marketing Material	Event Feasibility						Design Blueprint
	Programme Structure	Programme Sequence	Programme Delivery								
	Site Specs	Site Sourcing	Site Inspection	Site Layout							
	Theme Design	Decor Design	Furnishings	Signage							
	Food & Beverage/ Alcohol	Admittance Credentials	Crowd Management	Protocol							
	Entertainment Design	Staging & Technical Production	Attendee/Participant Plan	Training Plan							
	Hospitality	Accommodation	Transportation	Branding Integrity							
	Sales Plan	Sales Platforms	Quality Standards	Policies & Procedures							
	Cash Handling Procedures	Communication equipment	Procedures & Protocols	Advertising							
	Promotional Events	Cross Promotions	Sales Promotions	Contests							
	Publicity Plan	Project Plan	Public Relations Strategy	Logistics Plan							

Planning	Organisational Chart & HR	Resource Requirements	Administration Plan	Information System	**Design Blueprint**	**Event Proposal**
	Cash Flow	Procurement Plan	Monitoring & Evaluation Plan	Risk Techniques Strategies		
	Pricing	Manage Critical Path	Risk Analysis	Budget		
	Reporting Systems	Site Capabilities & Capacity / Augment	Contingency Plans	Legal & Regulatory Obligations		
	Insurance	Security	Event Merchandise	Brand Integrity		
Planning	Client Contracts	Sponsorship Contracts	Donor Contracts	Financial Plan	**Event Proposal**	**Event Contract**
	Controls & Procedures	Monitor/Revise Budget	Staff Recruitment	Training Implementation		
	Stakeholder Management		Performer Contracts			
Implementation	Communication	Monitor Risk	Food & Beverage	Emergency Management	**Event Contract**	**Event Plan**
	Health & Safety	Marketing Plan	Materials	Merchandise Material		
	Media Relations	Publicity Plan Implementation	Registration	Evaluation/Audit Procedures		
Implementation	Monitor Risk Management Plan	Site Set-up/Take Down	Distribute Marketing Materials	Merchandise Production / Distribution	**Event Plan**	**Event Notebook**
	Technical / Staging Installations	Production Schedule	Running Order / Time Line	Programme		
	Recognition / Motivation	Running Event	Attendee / Customer Management	Monitor Site		
The Event	Monitor Site	Monitor Set-up/ Risk/ Briefings	Run Event	Contingency Implementation	**Event Notebook**	**Event Checklists**
	Site Take Down	Feedback	Evaluate/Audit	Technical / Staging Production		
Implementation	Event Plan	Contracts	Logistics Plan	Communication Procedures	**Event Checklists**	**Event Evaluation**
	HR Staff / Volunteers	Marketing Plan/ Materials	Promotions/PR Crises and Controversies	Sales Activities		
	Risk Assessment	Monitor HR Plan	Communication Protocols	Monitor Strategic Plan		
Closure	Review	Evaluate	Develop Report	Deliver Report	**Event Evaluation**	**Event Report**

Meeting and Business Event Competency Standards Curriculum Guide, (MBECS), V1.0, September 26, 2012 available at mpiweb.org/MBECS.

Meeting Complexity Variables

1. Type of host organization (corporate, association, nonprofit)
2. Culture of host organization
3. Meeting goals and objectives
4. Relationship to other strategic and business plans (corporate/association/professional)
5. Profile of meeting attendees (variation in age, income level, cultures and language)
6. Local, regional, national or international in scope
7. First time or repeat event
8. Size and location of event
9. Financial parameters (sponsorship and funding requirements)

Scenario 1

Profile: Small corporation or association that holds an annual board meeting in its home-office region. Small group; most attendees know one another. The meeting purpose is to review year-end statistics and gain consensus on the strategy for next year.

Type of Host Organization: Corporate or association

Culture: Meetings are casual, but members are there to do business

Goals: Review year-end statistics and gain consensus on strategy for next year

Relationship to Other Business Plans: Association board may need to rationalize meeting costs within full annual budget; meeting results affect operating plan for two years

Attendee Profile: Ages range from 35-55 years; 75 percent male/25 percent female

Scope: Local

First Time or Repeat: Repeat

Size and Location: 50 people; home office location; needs one traditional venue

Financial Parameters: All costs paid by the association or corporation; no funding or registration fees required

Planning Details:

- One-day annual general meeting (AGM) of a small corporation or association with 50 people
- Traditional venue (hotel, conference center)
- Registration desk requires name badges only (attendees are pre-determined); check-in only; no registration fees
- Basic set-up requirements (rounds of 8)
- Basic audiovisual requirements including lectern mic, lavaliere mics, front projection, tripod screen
- All presenters are internal (affiliated with corporation or association)
- Food and beverage needs include one stand-up continental breakfast, one morning break (beverage service, fruit, yogurt), one sit-down luncheon (plated meal selected from standard venue menu), one afternoon break (beverage service, plus cookies)
- No dietary restrictions or cultural considerations for food and beverage

Scenario 2

Profile: Corporate, two-day professional development (PD) seminar. Medium-sized corporation that holds sales/motivational professional development seminars for regional sales people in home office location, on random schedule. Attendance is mandatory. Attendees are pre-registered, but select one of two PD offerings offered in breakout sessions.

Type of Host Organization: Corporate

Culture: Regional sales people who seldom see one another but enjoy the opportunity to get together to share experiences; company supports these meetings (including a social event) to strengthen the organization's operations and idea generation

Goals: Sales training and team building

Relationship to Other Business Plans: Host pays for quality facilities and food options; supports professional development; meeting is part of employee recognition program so some "extras" are included

Attendee Profile: Ages range from 30-50 years; 60 percent male/40 percent female

Scope: Regional

First Time or Repeat: Random schedule

Size and Location: 200 people; home office location, traditional venue (hotel, conference center)

Financial Parameters: Corporation pays all costs; no registration fees collected; provides quality rooms and food and beverage; adds additional features such as company advertising items and prizes

Planning Details:

- Registration desk requires name badges plus admission to Session A or B; no registration fees
- Traditional venue (hotel, conference center) with varying meeting room and food and beverage requirements; plenary and breakout rooms; bedrooms required for 50 out-of-city attendees; one social evening with cash bar, special menu and basic entertainment
- Basic set up of three meeting rooms, one in rounds of eight, the other two meeting rooms (break-outs) in theatre style for 100 each; 200 people for opening/closing plenaries and luncheons; large room for evening social
- Basic audiovisual setup in plenary with lectern mic, lavaliere mics, floor mics, rear/or flown projection, fully dressed stage and screen; two breakout rooms require basic audiovisual same as plenary; technician in each room to load, test and monitor speaker presentations, which include slideshow and audio components
- Plenary presenters are from the corporation; both of the PD presenters are professional motivational speakers hired through speakers bureaus
- Input required into selection of speakers; need to facilitate execution of speaker contracts; make arrangements for speaker travel, transfers and accommodation
- Local entertainment for evening social; basic sound equipment
- Food and beverage includes buffet breakfasts and plated luncheons each day in plenary room, plus morning and afternoon deluxe breaks (unique menu that varies from standard venue menus) in common foyer
- Dietary restrictions and cultural considerations were collected through registration process and must be communicated to catering manager, with confirmation of how wait staff will handle food service for attendees with special food needs

Scenario 3

Profile: National professional association three-day annual meeting for 500 people that brings together regional representatives for plenary discussions and professional development and organizes attendees into special interest groups for development of recommendations.

Type of Host Organization: Association

Culture: Diverse population, most people have never met

Goals: Professional development for members, plus special interest groups to develop recommendations to take forward to association board

Relationship to Other Business Plans: Association counts on revenue generation beyond covering the cost of meeting

Attendee Profile: Age ranges from 35-65 years; 50 percent male/50 percent female; two languages

Scope: National

First Time or Repeat: Annual, with revolving delegates each year

Size and Location: 500 people; central city with easy transportation access

Financial Parameters: Convention center for meeting space, and three hotels for bedrooms; registration fees are standard price and collected in advance; housing is handled on an individual, guest-pay basis directly to each hotel and guaranteed by guest credit card; no expenses reimbursed by association

Planning Details:

- Convention Centre required for meeting rooms; plenary space (theatre-style) for 500 people; breakfast, lunch dinner/gala space (banquet style in rounds of eight) for 500 people; five breakout rooms (100 people per room, theatre style)
- Exhibit space for 40 poster presentations/exhibits to combine as food and beverage common area with sufficient space for 500 people for breaks
- Speaker Ready Room with full audiovisual setup and dedicated tech for presenters to prep and rehearse
- VIP lounge for association executives
- Full audiovisual in all plenary space plus simultaneous translation booths (English and French) and certified translators
- Full audiovisual in all break-out rooms, but not simultaneous translation
- General presenters are from the association; five breakout presenters are professionals in negotiation, contract execution; all require arrangements for travel, accommodation, transfers, VIP handling (according to protocol) and food and beverage
- Registration collected information about special needs (wheelchairs, hearing impairments); needs to be communicated to various team members and venue departments
- Food and beverage requirements include buffet breakfasts each day; high-end custom-menu lunches each day to include 1) menu featuring local cuisine of hosting region, 2) luncheon hosted by next year's destination featuring that destination's food and entertainment, along with destination promotional video and 3) food-station luncheon prepared and served by local culinary college students; evening food and beverage includes 1) opening reception with hot and cold hors d'oeuvres and cash bar to eliminate any liquor liability issues, 2) optional free evening for delegates with dine-around choices at various local restaurants, available only through pre-registration and 3) closing gala evening with food stations and menus featuring cuisine representing the various cultures attending the meeting; closing performance by the host city's symphony orchestra and ballet (performer and stage-hand union contracts to be negotiated)
- Registration collected dietary restrictions and cultural considerations for food and beverage; these need to be communicated to all team members and venue departments

Scenario 4

Profile: Two-day meeting of top-ranking leaders of a currently seated national political party (60 people) to discuss and vote on a highly scrutinized policy that is drawing high levels of public and media attention.

Type of Host Organization: Government

Culture: Formal, political

Goals: Discuss and agree on highly scrutinized policy

Relationship to Other Business Plans: Cost must hold up to party operational plans and public scrutiny

Attendee Profile: Ages range from 40-75 years; 75 percent male/25 percent female, high-profile government party members, officials and staff

Scope: National

First Time or Repeat: No particular time pattern or host city history

Size and Location: 40 government officials, plus up to 20 staff; held in a hotel in a central major urban center

Financial Parameters: All costs paid with taxpayer dollars

Planning Details:

- Five-star flag hotel in downtown setting
- Upgraded accommodations for all attendees with all bedrooms located on concierge key-access levels with 24-hour security; 10 top-level VIP rooms
- Meeting room for 40 people at banquet tables, set in half-rounds; additional table seating elsewhere in room for staff; adjacent meeting room set in lounge-style with comfortable couches and chairs in small group-conversation configuration
- All meeting space on one floor, away from any public access and with no other meetings taking place on that floor
- Government security at entrance to hotel, meeting room floor and bedroom floors to ensure no media or public access
- Private dedicated security arranged for 10 of the 40 attendees
- All hotel staff and other suppliers requiring entry to meeting rooms (set up, wait staff) to be pre-cleared by government security and must be wearing access passes
- Audiovisual to include lectern mic and lavaliere mics, fully dressed screen, flown projection; no floor mics required
- Full simultaneous translation (English-French) with government approved interpreters; headsets available for all 40 attendees
- Food and beverage to include plated breakfast with custom menus both days, a custom-menu plated luncheon first day and a buffet luncheon the following day; morning and afternoon creative-menu breaks each day in the adjacent meeting room (lounge style); one evening dinner to be held off-site in private ranch location 30 minutes outside of the city, owned by prominent host-city business family, outdoor tented barbecue, offsite catering and performance by celebrity entertainer
- Security levels are high for all participants and celebrity entertainer including airport, hotel, ground transportation and offsite evening
- Extensive dietary restrictions collected from attendees' offices
- Protocol varies with attendees' level of government status; government protocol officer to be in attendance at all times, in all venues
- Each attendee personally greeted at airport and escorted via private limo company

Director of Meetings

Job Description

Alternate Titles

- Director of Events

Summary

Working within the scope of a corporate setting, a director of meetings oversees the entire meeting planning function for the organization. Types of meetings and events under the responsibility of the director may include sales meetings, product introductions and promotions, stockholder meetings, executive retreats, annual meetings, incentive trips and participation in industry-related trade shows and exhibits. For each activity, goals, objectives and a corresponding budget are set. Typically works under very limited supervision and direction. A high degree of creativity, discretion and latitude is required. Travel is also required.

Major Tasks, Responsibilities and Key Accountabilities

- Aligns meeting strategy to organizational strategy.
- Assess client needs and expectations, recommend production elements and budget expenditures and articulate program's goals and objectives.
- Make key decisions related to meeting design, content and treatment.
- Provide overall event strategy and choreography of meetings and events.
- Oversee daily operations of the meetings/events department.
- Hire, train, motivate and lead staff and other team members.
- Direct event team to provide meeting planning services that satisfy the needs and expectations of attendees and the organization.
- Establish, monitor and manage performance expectations for meetings, vendors and staff.
- Evaluate the impact of meetings using standardized measurement practices and tools.
- Integrate international business protocol and cultural sensitivities into meeting planning activities.
- Drive budget development, tracking and reconciliation of all meeting expenses.
- Prepare executive reports on group activities, such as meeting statistics and metrics.
- Provide onsite management of meetings and events to include oversight of vendors and staff.
- Anticipate, develop and implement contingency plans for meeting activities.
- Complete post-event tasks to include evaluation and follow up with client on meeting results.
- Develop, implement and evaluate parameters, policies and procedures for meetings.
- Develop, implement and evaluate meeting processes.
- Maintain logistical accountability of meetings.

Qualifications

- Bachelor's degree preferred or equivalent experience.
- 10+ years of related experience in the meeting industry.
- Five+ years of supervisory experience.

Knowledge, Skills, Abilities and Competencies

- Business acumen
- Interpersonal skills
- Consultative skills
- Customer service skills
- Organizing skills
- Attention to detail
- Time management skills
- Project management skills
- Change management skills
- Vendor management skills
- Negotiation skills
- Budgeting skills
- Supervisory skills
- Relationship management skills
- Problem-solving skills
- Analytical skills
- Verbal and written communication skills including active listening and questioning skills
- Computer literacy
- Ability to develop standardized operating procedures and give clear directions
- Ability to work independently and meet deadlines
- Ability to work well under pressure
- Ability to prioritize workflow and to coordinate the work of others
- Ability to influence others
- Ability to work flexible hours
- Knowledge of marketing and event disciplines
- Knowledge of meeting industry standards and best practices
- Knowledge of risk management strategies and practices
- Knowledge of process improvement strategies and standards
- Knowledge of international travel safety, business protocol and other destination-specific information as needed by attendees
- Organizational awareness and knowledge of corporate standards and procedures

Association Meeting Planner

Job Description

Alternate Titles

- Meeting and Event Planner
- Event Planner
- Meeting Planning Associate

Summary

Working within the scope of the association or non-profit sector, a meeting planner plans and executes conferences for local, regional, national or international attendees, which may include educational tracks, multiple speakers, exhibits and offsite programs. Typically includes the development of program content to encourage membership retention and growth. Works under supervision and direction of a supervisor. A moderate degree of creativity, discretion and latitude is required. Travel is also required.

Major Tasks, Responsibilities, and Key Accountabilities

- Consult with key stakeholders to determine program's goals, objectives and budget.
- Assists in identifying learner objectives and outcomes.
- Research, recommend and select meeting sites and activities that support objectives.
- Initiate proposals with vendors; negotiate and manage vendors and contracts.
- Develop meeting specifications including banquet event orders and work plans including timeline and budget.
- Coordinate and manage pre-planning meetings with project team; coordinate all information for meetings and events and disseminate appropriately.
- Coordinate logistics planning including agenda/program development, speaker engagement, food and beverage menu selections, air and ground transportation arrangements, registration and housing processes and audiovisual/technical needs.
- Track meeting and event expenditures to stay within or below budget.
- Track attendance, registration, hotel history and attendee satisfaction.
- Prepare and compile routine and ad hoc status reports on group activities, such as meeting statistics and metrics.
- Coordinate with all vendors to ensure services and materials are professional and appropriately reflect company standards.
- Complete checklists for event to ensure proper execution.
- Provide onsite management of meetings and events to include oversight of vendors.
- Implement contingency plans as needed onsite.
- Troubleshoot and solve onsite problems seamlessly.
- Complete post-event tasks including reconciliation of expenses, evaluation of event and report on meeting results.

Qualifications

- Bachelor's degree preferred or equivalent experience.
- Minimum three years of related experience in the meeting industry.

Knowledge, Skills, Abilities and Competencies

- Interpersonal skills
- Customer service skills
- Organizing skills
- Attention to detail
- Time management skills
- Project management skills
- Change management skills
- Vendor management skills
- Negotiation skills
- Budgeting skills
- Relationship management skills
- Problem-solving and analytical skills
- Verbal and written communication skills to include active listening and questioning skills
- Computer literacy
- Ability to implement standardized operating procedures and follow clear directions
- Ability to work independently and meet deadlines
- Ability to work well under pressure
- Ability to work in a team environment
- Ability to work flexible hours
- Knowledge of marketing and event disciplines
- Knowledge of meeting industry contracting standards and practices
- Knowledge of adult learning theories
- Organizational awareness and knowledge of corporate standards and procedures

Corporate Meeting Planner

Job Description

Alternate Titles

- Meeting and Event Planner
- Event Planner
- Meeting Associate
- Meeting Planning Associate

Summary

Working within the scope of a corporate setting, a meeting planner plans and executes activities such as sales meetings, product introductions and promotions, stockholder meetings, executive retreats, annual meetings, incentive trips and participation in industry-related trade shows and exhibits. For each activity, goals, objectives and a corresponding budget are set. Typically works under the general supervision and direction of a supervisor. A moderate degree of creativity, discretion and latitude is required. Travel is also required.

Major Tasks, Responsibilities and Key Accountabilities

- Consult with business owner to determine program's goals, objectives and budget.
- Research, recommend and select meeting sites and activities that support objectives.
- Initiate proposals with vendors on behalf of clients; works with internal client to finalize contracts; negotiate and manage vendors and contracts.
- Develop meeting specifications including banquet event orders and work plans including timeline and budget.
- Coordinate and manage pre-planning meetings with project team; coordinate all information for meetings and events and disseminate appropriately.
- Coordinate logistics planning including agenda/program development, food and beverage menu selections, air and ground transportation arrangements, registration and housing processes and audiovisual/technical needs.
- Track meeting and event expenditures to stay within or below budget.
- Track attendance, registration, hotel history and attendee satisfaction.
- Prepare and compile routine and ad hoc status reports on group activities, such as meeting statistics and metrics.
- Coordinate with all vendors to ensure services and materials are professional and appropriately reflect company standards.
- Complete checklists for event to ensure proper execution.
- Provide onsite management of meetings and events to include oversight of vendors.
- Implement contingency plans as needed onsite.
- Troubleshoot and solve onsite problems seamlessly.
- Complete post-event tasks include reconciliation of expenses, evaluation of event, and report out on meeting results.

Qualifications

- Bachelor's degree preferred or equivalent experience.
- Minimum three years of related experience in the meeting industry.

Knowledge, Skills, Abilities, and Competencies

- Interpersonal skills
- Customer service skills
- Organizing skills
- Attention to detail
- Time management skills
- Project management skills
- Change management skills
- Vendor management skills
- Negotiation skills
- Budgeting skills
- Relationship management skills
- Problem-solving and analytical skills
- Verbal and written communication skills to include active listening and questioning skills
- Computer literacy
- Ability to implement standardized operating procedures and follow clear directions
- Ability to work independently and meet deadlines
- Ability to work well under pressure
- Ability to work in a team environment
- Ability to work flexible hours
- Knowledge of marketing and event disciplines
- Knowledge of meeting industry contracting standards and practices
- Organizational awareness and knowledge of corporate standards and procedure

Meeting Coordinator

Job Description

Alternate Titles

- Meeting Planning Assistant
- Program Coordinator
- Administrative Assistant
- Executive Assistant

Summary

Working within the scope of the association or non-profit sector, a meeting coordinator provides administrative and logistical support to a meeting planner or team of meeting professionals in planning conferences for local, regional, national or international attendees that may include educational tracks, multiple speakers, exhibits and offsite programs. Works under the direct supervision and direction of meeting and event staff.

Major Tasks, Responsibilities and Key Accountabilities

Provide on-going administrative support to include the drafting of general correspondence and other communications; organizing data, files and materials; compiling information; preparing routine and ad hoc reports; making travel and meeting arrangements; and responding to requests for assistance.

- Follow well-defined meeting parameters and ensure that defined policies and procedures are implemented.
- Research venues, menus, amenities and activities.
- Coordinate specific logistics of meetings, such as speaker engagement, housing, transportation, material preparation, registration and signage.
- Maintain various databases.
- Disseminate information as directed.
- Assist with onsite meeting management.
- Track expenditures to budget and process approved invoices for payment
- Identify and solve problems within scope of responsibility.
- Provide customer service to internal and external customers.

Qualifications

- High school diploma preferred or its equivalent.
- Up to two years of related experience in the meeting industry.
- Two to four years of administrative experience.

Knowledge, Skills, Abilities and Competencies

- Interpersonal skills
- Customer service skills
- Organizing skills
- Multitasking and project management skills
- Attention to detail
- Computer literacy
- Problem-solving and analytical skills
- Verbal and written communication skills to include active listening and questioning skills
- Ability to implement standardized operating procedures and follow clear directions
- Ability to work independently and meet deadlines
- Ability to work flexible hours
- Organizational awareness and knowledge of corporate standards and procedures

What Can I Do With A Degree in Tourism, Conventions and Event Management?

Tourism Management:

The planning, development, organization and marketing of attractions and host destinations, and the understanding of the person traveling outside their usual habitat to experience these attractions

Permanent Attractions Management	Cultural/ Heritage/ Educational	Entertainment	Theme Parks
Destination Management and Planning	Visitors Bureaus	Development Agencies	Destination Marketing

Event Management:

The strategy, organization, planning and coordination of temporary, structured attractions

Cultural Events	Festivals/ Parades	Exhibits/Art & Museum	Fairs
Business Events	Conventions/ Expositions	Meetings	Sales Training
Sport Events	Hallmark Events	Professional Events	Amateur Events

Hospitality Management:

The planning, organizing, leading and controlling of the activities that support people when away from home

Lodging	Hotel Management	Bed & Breakfast	Time Share/ Condos
Food Service	Restaurants	Catering	Beverage Management
Travel	Travel Coordination	Mass Transit	Travel Managers
Facilities	Convention/ Meeting Venues	Sport Venues	Entertainment Venues

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