



# MEETING AND BUSINESS EVENT COMPETENCY STANDARDS



CANADIAN TOURISM  
HUMAN RESOURCE  
COUNCIL

CONSEIL CANADIEN DES  
RESSOURCES HUMAINES  
EN TOURISME



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**FUTURE DEVELOPMENT OF THE MEETING AND BUSINESS EVENT COMPETENCY STANDARD**

We welcome your comments and suggestions. If you have observations about the competency standards or would like to provide suggestions on their content or application, send an email to [standards@cthrc.ca](mailto:standards@cthrc.ca). Feedback informs the maintenance and update of the competency standards. They are periodically updated to ensure they remain relevant and reflect current and emergent practices endorsed by leading practitioners.

Download this standard from the CTHRC at [http://emerit.ca/en/free\\_downloads/occupational\\_standards.aspx](http://emerit.ca/en/free_downloads/occupational_standards.aspx) or from MPI at [www.mpiweb.org/portal/research](http://www.mpiweb.org/portal/research).

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“

It is one thing to call ourselves professionals and another thing altogether to be regarded and respected as professionals by organizations and employers outside the meeting industry. Having recognized standards will provide the necessary framework and increased credibility we have been seeking for decades. ”

Carol Krugman, MEd, CMP, CMM  
Director, Meeting & Business Event Management  
Metropolitan State College of Denver  
Department of Hospitality, Tourism and Events  
Management  
U.S.

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## INTRODUCTION

### MEET THE INDUSTRY

Meetings and business events drive sales and profitability and enable organizations to deliver on key strategic objectives. They serve as a catalyst for education and professional development, motivation, behavior change and concrete action. Meetings and business events are held for numerous reasons from sharing information, training and building business relationships to promoting products and planning projects.

Meetings and business events impact the success of organizations and individuals as well as their communities. Local economies rely on job creation and tax revenue produced by meetings and events. In the U.S. alone, the economic impact of meetings on the economy in 2009 was US\$263 billion (PricewaterhouseCoopers); in Canada, that impact was CAD\$71 billion in 2008 (Maritz Research). Business travelers spend two times more than leisure travelers and fuel local economies.

For every dollar invested in business travel for face-to-face meetings, companies realize US\$12.50 in incremental revenue, and the average U.S. business would forfeit 17 percent of its profits in the first year without business travel, according to a study by the U.S. Travel Association and Oxford Economics.

As the demands for meetings and business events continue to grow and evolve, the competencies required of meeting and business event professionals become more acute and complex. Competency standards are essential to demonstrating the broad range of knowledge and skills required of those who work in the meeting and business event industry.

### HISTORY

These standards were developed through a process of consultation and validation with an expert group of industry stakeholders. Following, find the key phases of that development.

1. The Canadian Tourism Human Resource Council (CTHRC), whose mandate it is to improve the quality of the tourism workforce, introduced some of the first events-related national occupational standards in 1993 and has routinely updated them to keep pace with market needs and to help ensure that the industry remains globally competitive.

2. In 2009, the CTHRC set its first international competency standards with expert practitioners from more than 20 countries. The *Event Management International Competency Standards* were the first set of competency standards to achieve industry validation on a global scale.

3. In 2007, MPI recognized the need for a comprehensive international body of knowledge and skills that could guide the professional development of meeting and business event professionals. The competency standards had to apply to the diversity of the industry—the many types of business and meeting events, dynamic career paths and varied levels of expertise.

4. MPI decided to collaborate with the CTHRC to build on the existing *Event Management International Competency Standards* to establish global standards specific to meetings and business events. The resulting *Meeting and Business Event Competency Standards* (MBECS) represents a comprehensive summary of the knowledge and skills that should be possessed by experienced meeting and business event experts.

### STANDARDS USE

The *Meeting and Business Event Competency Standards* provide the meeting and business event industry with a comprehensive description of the competencies required of industry professionals. Such a repository of performance and knowledge standards is essential to clearly outlining what is required for success at

“ This document outlines the essential core competencies of the profession and should be used as a blueprint when creating and assessing program and course learning outcomes. This will allow future industry leaders to have confidence that they are focusing on the knowledge, skill and ability elements essential to be successful in this field. ”

Amanda Cecil, PhD, CMP

School of Physical Education and Tourism,  
Management Department of Tourism,  
Conventions and Event Management  
Indiana University  
Chair, MPI Body of Knowledge Taskforce  
U.S.

“ The MPI standards project is a wake-up call for the meeting and business event industry. Meetings mean business. It takes confident and savvy business people who are not only nimble problem solvers for the organizations they serve, but are personally strategic in obtaining the well-rounded, necessary education and skills that will better position them for a long-term and successful career—no matter the roles or venues. ”

Chrissy Ward, MS, CAE

Director, Membership & Operations,  
Society of Gynecologic Oncologists  
U.S.

## INTRODUCTION

all levels in this diverse industry. Any profession must have standards that outline required competencies.

Specific groups that can benefit from these standards include industry professionals, associations, educators/trainers, students, employers, supervisors, clients, governments and local authorities. Your particular job context and your level of responsibility will determine if all or only select competencies apply to you.

### Are you a meeting professional?

Use these standards as a guide to:

- learn more about the meeting and business event industry
- recognize and promote your skills to employers and clients
- plan, implement and evaluate meeting and business events
- enhance your performance
- increase your job mobility across industry occupations and countries
- plan your professional development
- plot your career path

### Are you a meeting or business event industry association?

Use the standards as a guide to:

- identify members' training needs
- develop programs that are consistent and globally recognized
- seek recognition for the skills and knowledge required by industry professionals

### Are you an educator or trainer?

Use the standards as a guide to:

- benchmark existing programs against industry standards
- develop programs that are consistent and globally recognized
- create new vocational qualifications
- explore areas for research in meeting and business event management

### Are you a student?

Use the standards as a guide to:

- learn about the knowledge and skills possessed by professionals in the meeting and business event industry
- determine if the meeting and business event industry matches interests and skills for career planning
- identify learning needs
- determine which educational programs meet your learning needs

## INDUSTRY TERMS

For any definitions regarding terms in these standards, please consult the APEX glossary on the Convention Industry Council's (CIC) website:

[www.conventionindustry.org/StandardsPractices/APEX/glossary.aspx](http://www.conventionindustry.org/StandardsPractices/APEX/glossary.aspx)

### Are you an employer or supervisor?

Use the standards as a guide to:

- identify workforce needs
- define job requirements
- write job advertisements
- create job descriptions
- assess potential employees
- plan learning and development activities
- assess employee performance and provide feedback

### Do you purchase meeting and business event services or do you represent a government or local authority?

Use the standards as a guide to:

- construct requests for proposals
- assess proposals
- inform the development of policy or regulations

“MBECS is a concrete commitment by our industry to identify the nature and level of requisite core competencies. As a professional congress organizer who defines clients' requirements and serves their organizational needs through developing multidisciplinary planning teams and delivering services, I'll use MBECS both as a benchmark and as a touchstone to identify skill gaps and development opportunities of team members. MBECS will improve the quality of the services, products and processes that we provide.”

Brent Moore, CMP, CMM

President  
Brent Moore & Associates Inc.  
Conferences and Expositions Services  
Canada

“Engaging MPI members from South Africa and across the world has been pivotal in defining a truly global perspective to the content of the MBECS. South Africa is a country that seeks to develop meeting and business event professionals of the highest standard, and MBECS defines the educational competencies required to do this.”

Peta Thomas MBA, CMP

Chief Financial Officer  
Total Impact Communications  
Business Tourism Events  
South Africa



## HOW TO USE THE STANDARDS

### Major Category

The standards are divided into 12 major categories or functional areas:

- Administration
- Communication
- Financial Management
- Human Resources
- Marketing
- Meeting or Event Design
- Professionalism
- Project Management
- Risk Management
- Site Management
- Stakeholder Management
- Strategic Planning

### A. STRATEGIC PLANNING

#### SKILL 1 Manage Strategic Plan for Meeting or Event

8 Years

Occasionally

4

#### Common Knowledge:

- Basic business management skills
- Trend analysis and forecasting methods
- Methods to analyze and interpret data

#### Subskills

1.01 Develop mission statement, goals and objectives of meeting or event

#### Knowledge and Abilities

##### Knowledge of:

- purpose and objectives for meeting or event
- mission statement, goals and objectives of organization and stakeholders
- target market(s)
- type of geographic location and local culture envisaged by organization
- type of meeting or event envisaged by organization, e.g., spectator, participatory
- sustainability objectives, e.g., financial, environmental, social
- financial resources that may be available
- target date(s)
- cross-cultural issues, e.g., holidays
- special conditions

##### Ability to:

- work with, communicate and understand stakeholder goals
- develop mission statement to specify purpose, philosophy and target markets
- create goal statements to specify how meeting or event will achieve its mission
- establish objectives to specify actions, time frames and performance measure-

### Skills

Most major categories contains one or more skills.

### Contextual Information<sup>1</sup>

Each skill is ranked on three dimensions:

The time it takes to master the skill or task

Frequency at which the task is performed or manifested

Level of importance of the skill or task relative to the total job

### Subskills

Each skill is made up of one or more sub-skills.

### Common Knowledge

Common knowledge lists the knowledge needed in all of the sub-skills.

### Knowledge and Abilities

Each sub-skill is described by the knowledge and abilities required to competently perform it.

### SUMMARY RANKINGS

The average number of years it takes to master the Meeting and Business Event Competency Standards is 4.625 years.

More than 2/3 of the overall skills defined in this standard were ranked at five or fewer years.

In terms of importance: 62.5 percent of skills or tasks are ranked at the highest level (5), followed by 22 percent rated at 4, 1 percent rated at 3 and only one skill rated at 1.

### Contextual Information

Each skill is ranked on three dimensions.

1. The time it takes to master the skill or task is characterized in terms of years based on the broad generalization of a typical industry professional who is 30 years old, has two or three years of post-secondary education (e.g., college) and has no experience in meeting planning and little or no experience in the industry.

Additionally, the expert panel made decisions on the premise that the new entrants would have ideal work conditions. They would be exposed to the complete range of skills as defined in the standards, taking into account the varying levels of complexity and work. Mastery could be achieved only if an individual had managed at least two large-scale events or 10 smaller events within a year. Their professional development would be supported through appropriate training or guidance by qualified practitioners and independence in making decisions.

2. Frequency at which the task is performed or manifested refers to the rate of occurrence of the skill or task. The panel was asked "How often is this skill or task performed?" The group set the following scale before ranking each item.

- Routinely: customary or regular course of procedure
- Occasionally: from time to time; less frequent than routinely
- Per Project: only when a project is initiated and often only required once
- Daily, weekly, monthly, annually

3. Level of importance of the skill or task relative to the total job defines the relative importance of the skill to the job or to the consequences of the skill not being performed or not being performed according to standard. The group worked with the following guidelines to make decisions.

1 = *Not important:*

Performance of this skill is not essential to the job

2 = *Somewhat important:*

Performance of this skill is minimally necessary to the job

3 = *Important:*

Performance of this skill is moderately essential to the job

4 = *Very important:*

Performance of this skill is essential to the job

5 = *Extremely important:*


Performance of this skill is critical; non-performance poses a risk

## Standards Summary

<b>A. STRATEGIC PLANNING</b>	<ol style="list-style-type: none"> <li>1. Manage Strategic Plan for Meeting or Event</li> <li>2. Develop Sustainability Plan for Meeting or Event</li> <li>3. Measure Value of Meeting or Business Event</li> </ol>
<b>B. PROJECT MANAGEMENT</b>	<ol style="list-style-type: none"> <li>4. Plan Meeting or Event Project</li> <li>5. Manage Meeting or Event Project</li> </ol>
<b>C. RISK MANAGEMENT</b>	<ol style="list-style-type: none"> <li>6. Manage Risk Management Plan</li> </ol>
<b>D. FINANCIAL MANAGEMENT</b>	<ol style="list-style-type: none"> <li>7. Develop Financial Resources</li> <li>8. Manage Budget</li> <li>9. Manage Monetary Transactions</li> </ol>
<b>E. ADMINISTRATION</b>	<ol style="list-style-type: none"> <li>10. Perform Administrative Tasks</li> </ol>
<b>F. HUMAN RESOURCES</b>	<ol style="list-style-type: none"> <li>11. Manage Human Resource Plan</li> <li>12. Acquire Staff and Volunteers</li> <li>13. Train Staff and Volunteers</li> <li>14. Manage Workforce Relations</li> </ol>
<b>G. STAKEHOLDER MANAGEMENT</b>	<ol style="list-style-type: none"> <li>15. Manage Stakeholder Relationships</li> </ol>
<b>H. MEETING OR EVENT DESIGN</b>	<ol style="list-style-type: none"> <li>16. Design Program</li> <li>17. Engage Speakers and Performers</li> <li>18. Coordinate Food and Beverage Services</li> <li>19. Design Environment</li> <li>20. Manage Technical Production</li> <li>21. Develop Plan for Managing Movement of Attendees</li> </ol>
<b>I. SITE MANAGEMENT</b>	<ol style="list-style-type: none"> <li>22. Select Site</li> <li>23. Design Site Layout</li> <li>24. Manage Meeting or Event Site</li> <li>25. Manage On-site Communications</li> </ol>
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<b>L. COMMUNICATION</b>	<ol style="list-style-type: none"> <li>33. Conduct Business Communications</li> </ol>

## SKILL 1 Manage Strategic Plan for Meeting or Event

 8 Years

 Occasionally

     4

### Common Knowledge:

- Basic business management skills
- Trend analysis and forecasting methods
- Methods to analyze and interpret data

Subskills		Knowledge and Abilities
1.01	Develop mission statement, goals and objectives of meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• purpose and objectives for meeting or event</li> <li>• mission statement, goals and objectives of organization and stakeholders</li> <li>• target market(s)</li> <li>• type of geographic location and local culture envisaged by organization</li> <li>• type of meeting or event envisaged by organization, e.g., spectator, participatory</li> <li>• sustainability objectives, e.g., financial, environmental, social</li> <li>• financial resources that may be available</li> <li>• target date(s)</li> <li>• cross-cultural issues, e.g., holidays</li> <li>• special conditions</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• work with, communicate and understand stakeholder goals</li> <li>• develop mission statement to specify purpose, philosophy and target markets</li> <li>• create goal statements to specify how meeting or event will achieve its mission</li> <li>• establish objectives to specify actions, time frames and performance measurements needed to achieve goals</li> <li>• align mission statement, goals and objectives of meeting or event and organization/stakeholders</li> <li>• manage cross-cultural issues</li> </ul>
1.02	Determine feasibility of meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting and event industry, including emerging trends</li> <li>• research methods suitable to ascertain viability of meeting or event</li> <li>• applicable legislation and regulatory requirements</li> <li>• sources of potential revenue</li> <li>• timeline constraints</li> <li>• societal trends</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• keep information about meeting or similar events including historical data, e.g., surveys, evaluations</li> <li>• evaluate similar or competitive events</li> <li>• network with resource people, e.g., previous hosting committees/communities, service groups, suppliers</li> <li>• identify legal and regulatory requirements</li> <li>• conduct market research, i.e., survey(s)</li> <li>• determine short-, medium- and long-term economic and social impacts on hosting community</li> <li>• develop profile of potential attendees</li> <li>• analyze costs and benefits</li> <li>• decide on complexity of meeting or event, e.g., size, duration, number of activities, service requirements and attendees</li> <li>• assess risk components</li> </ul>

		<ul style="list-style-type: none"> <li>• specify potential sources of revenue and other resources</li> <li>• define opportunities for strategic alliances, e.g., with existing facilities and events</li> <li>• recommend to organization/stakeholders whether or not to proceed with meeting or event</li> <li>• identify potential stakeholders</li> </ul>
1.03	Determine requirements to carry out meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event requirements, e.g., human resources, marketing, logistics/operations</li> <li>• legal and regulatory restrictions</li> <li>• cost/benefit analysis</li> <li>• tools or resources available for meeting or event planning, e.g., software</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify requirements based on scope of meeting or event, for example: <ul style="list-style-type: none"> <li>- planning cycle</li> <li>- sponsorship opportunities</li> <li>- additional sources of resources</li> <li>- meeting or event evaluation</li> <li>- administrative needs</li> <li>- leadership and management</li> <li>- logistics and operations structure</li> <li>- cross-cultural needs</li> <li>- marketing</li> <li>- human resources, e.g., number of people, wage rates</li> <li>- meeting or event timing, location and size</li> <li>- data flow, storage and manipulation</li> <li>- public relations</li> <li>- systems to track progress towards goals, e.g., sales to financial plan</li> </ul> </li> <li>• research options available to meet requirements</li> <li>• evaluate costs and benefits for options available</li> <li>• select and record best options/strategies</li> <li>• obtain support and involvement of organization in strategic planning</li> </ul>
1.04	Develop financial summary	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• types of financial information required for a strategic plan</li> <li>• tools or resources for financial planning, e.g., spreadsheets, software</li> <li>• options available to meet needs and respective costs, e.g., contract and employment situations for personnel</li> <li>• foreign currency implications</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• compile financial information, for example: <ul style="list-style-type: none"> <li>- financial results</li> <li>- current financial position</li> <li>- sources and applications for funding</li> <li>- current balance sheet details, e.g., assets, liabilities, equity</li> <li>- statement of operational costs</li> <li>- cash flow statements</li> <li>- projected closing balance sheets</li> <li>- break-even analysis</li> <li>- projected return on investment</li> <li>- applicable taxes or levies</li> </ul> </li> <li>• seek professional assistance as required, e.g., accountant, banker</li> <li>• understand impact of foreign currency</li> </ul>

1.05	Monitor strategic plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• mission statement, goals and objectives of organization</li><li>• financial plan</li><li>• logistics and critical path</li><li>• inter-relatedness of all aspects of meeting or event</li><li>• potential impact of changes on all other aspects of meeting or event</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• compare meeting or event progress to mission statement, goals and objectives</li><li>• monitor cash flow to determine financial standing</li><li>• financial resources</li><li>• analyze all data available when deciding to change course</li><li>• record change control details, e.g., date, rationale, implementation plan</li><li>• seek professional assistance as required, e.g., accountant, banker</li><li>• suggest changes or revisions to strategic plan, if needed, with organization and/or key stakeholders</li></ul>
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**SKILL 2** Develop Sustainability Plan for Meeting or Event

 5 Years

 Per Project

**Common Knowledge:**

- Concepts of sustainability, i.e., integration of economic, social and environmental considerations in meeting or event planning

- Capacity planning and need for growth
- Mission statement, goals and objectives of organization
- Inter-relatedness of all aspects of meeting or event
- target market(s)

Subskills		Knowledge and Abilities
2.01	Implement sustainability management plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• geographic location, local populations, their culture(s) and history</li> <li>• local issues and concerns, e.g., social, economic, environmental</li> <li>• meeting or event concept and image</li> <li>• quality standards for meeting or event, e.g., ISO 20121, BS8901</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review evaluations and feedback from previous and/or similar meetings or events</li> <li>• consider potential short- and long-term impacts of meeting or event</li> <li>• determine needs for sustaining meeting or event, e.g., systems, quality control</li> <li>• comply with legislation, e.g., environmental, local zoning, human rights, health and safety, labor</li> <li>• select strategies to create positive outcomes and mitigate negative impacts of meeting or event, for example:                             <ul style="list-style-type: none"> <li>- support initiatives for community development, e.g., infrastructure, social programs</li> <li>- utilize local residents</li> <li>- use local and fair-trade goods and services</li> <li>- protect cultural and historical sites</li> </ul> </li> <li>• align sustainability practices with existing organizational process(es), if required</li> </ul>
2.02	Demonstrate environmental responsibility	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• environmental issues and concerns of local area</li> <li>• environmental capacity of community, e.g., waste management infrastructure</li> <li>• current environmental technology and practices</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• integrate environmental awareness into meeting or event management</li> <li>• apply conservation practices, for example:                             <ul style="list-style-type: none"> <li>- reduce energy use</li> <li>- reduce water consumption</li> </ul> </li> <li>• implement recycling programs, for example:                             <ul style="list-style-type: none"> <li>- purchase recyclable products</li> <li>- set up recycling collection systems</li> </ul> </li> <li>• reduce pollution, for example:                             <ul style="list-style-type: none"> <li>- minimize noise and light pollution</li> <li>- control use of harmful substances, e.g., chemicals, paints</li> </ul> </li> <li>• purchase goods and services from environmentally responsible suppliers, as appropriate</li> </ul>

### SKILL 3 Measure Value of Meeting or Business Event

 8 Years

 Routinely/Regularly

 5

#### Common Knowledge:

- Mission statement, goals and objectives of meeting or event and organization
- Return on investment methods
- Types of research and evaluation appropriate for all aspects of meeting or event

Subskills		Knowledge and Abilities
3.01	Develop evaluation plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event objectives</li> <li>• stakeholders</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define return on investment objectives/expected outcomes, e.g., efficiency, effectiveness, accountability, justifying investments</li> <li>• decide what data will be collected, e.g., costs, attendee feedback</li> <li>• determine timing and sequencing of data collection</li> <li>• identify resource requirements</li> </ul>
3.02	Measure return on investment	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• data collection methods</li> <li>• data analysis</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• collect data, e.g., evaluation-related, attendance</li> <li>• analyze data</li> <li>• present/report data</li> </ul>
3.03	Evaluate/audit meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• information management plan, e.g., available sources of information</li> <li>• integrated communication plan</li> <li>• extent of responsibility for evaluation</li> <li>• information analysis processes</li> <li>• methods and principles of evaluation</li> <li>• generally accepted accounting principles</li> <li>• sources of information, e.g., plans, budget, variance reports, progress reports</li> <li>• data collection methods</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review critical success factors for meeting or event, i.e., benchmarks</li> <li>• implement evaluation/audit procedures as scheduled, for example:                             <ul style="list-style-type: none"> <li>- collect and analyze information</li> <li>- verify validity and reliability of information</li> <li>- identify and report any difficulties accessing information</li> <li>- identify and address irregularities</li> </ul> </li> <li>• evaluate information, e.g., identify reasons for success/failure and key lessons for future meetings or events</li> <li>• develop report:                             <ul style="list-style-type: none"> <li>- detail information used and information sources</li> <li>- explain how information has been analyzed</li> <li>- draw conclusions and make recommendations based on evidence</li> <li>- use best format for organizations. key personnel and stakeholders</li> </ul> </li> </ul>

		<ul style="list-style-type: none"><li>• follow integrated communication plan for distribution of evaluation/audit report and confidentiality guidelines</li><li>• debrief internal and external stakeholders</li></ul>
3.04	Evaluate effectiveness of risk management plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• risk management plan</li><li>• risk management strategies and techniques</li><li>• applicable legislation, e.g., fire, liability, public health, environmental protection</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• collect and evaluate information on how risks were dealt with</li><li>• monitor use of resources allocated to risk management:<ul style="list-style-type: none"><li>- ensure sufficient resources are available</li></ul></li><li>• identify areas for improvement</li><li>• inform key personnel of effectiveness or deficiencies of techniques and strategies, and identify necessary action to be taken</li><li>• make changes to risk management plan as needed</li><li>• communicate to stakeholders as needed</li></ul>



**SKILL 4** Plan Meeting or Event Project

 3 Years

 Daily



**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Types of research and evaluation appropriate for all aspects of meeting or event
- Meeting or event details, e.g., features, critical path
- Scope and requirements of meeting or event, e.g., human resources, marketing, logistics/operation

Subskills		Knowledge and Abilities
4.01	Develop project plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• target market(s)</li> <li>• meeting or event planning tools, e.g., Gantt chart, software</li> <li>• stakeholder requirements</li> <li>• processes to deliver meeting or event</li> <li>• possible constraints or conditions, e.g., regulations</li> <li>• types of event and meeting formats</li> <li>• attendee profile</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review historical data, e.g., previous project plan(s):                             <ul style="list-style-type: none"> <li>- identify strengths and weaknesses</li> <li>- review goals and objectives</li> <li>- compare results to goals and objectives</li> </ul> </li> <li>• develop processes that will contribute to achieving goals</li> <li>• specify the actions, time frames and performance measurements needed to achieve objectives</li> <li>• identify resources available, e.g., financial, material, staff</li> <li>• involve relevant stakeholders in planning process, for example:                             <ul style="list-style-type: none"> <li>- include attendees</li> <li>- conduct exploratory research</li> <li>- seek peer reviews</li> </ul> </li> </ul>
4.02	Develop quality standards, policies and procedures	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event industry (national and international) standards</li> <li>• research methods</li> <li>• organizational standards and policies</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review legal, regulatory, ethical and social requirements for meeting or event</li> <li>• examine existing standards, policies and procedures</li> <li>• develop contracts</li> <li>• define areas requiring standards, policies or procedures</li> <li>• conduct research</li> <li>• obtain expert advice and information when necessary</li> <li>• gain support of organization and key stakeholders</li> </ul>
4.03	Develop theme for meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• range of creative, promotional, technical and operational options</li> <li>• key stakeholders</li> <li>• budget parameters</li> <li>• target market(s)</li> <li>• marketing and public relations options</li> <li>• destination branding and brand management</li> </ul>

		<ul style="list-style-type: none"> <li>• program objectives</li> <li>• cross-cultural elements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine stakeholder expectations:             <ul style="list-style-type: none"> <li>- research target market(s)</li> <li>- analyze post-event reports</li> <li>- research attendee expectations</li> </ul> </li> <li>• generate ideas, e.g., brainstorm, network</li> <li>• conceive a meeting or event theme that will complement or integrate with organization’s marketing and brand strategy</li> <li>• design meeting or event from participant/spectator perspective</li> <li>• engage expertise if required, e.g., marketing firm, consultant</li> <li>• conceptualize theme:             <ul style="list-style-type: none"> <li>- identify core concepts, topics or messages</li> <li>- create appealing images, e.g., logo</li> <li>- identify means to integrate theme into all aspects of meeting or event</li> <li>- involve stakeholders, e.g., consider requirements of sponsors</li> <li>- consider cultural environment and norms</li> <li>- identify destination attributes</li> </ul> </li> <li>• integrate branding and theme imagery into aspects of meeting or event experience</li> </ul>
<p>4.04</p>	<p>Develop procurement plan</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• how to conduct a cost/benefit analysis</li> <li>• request for proposal process</li> <li>• organizational strategies and policies</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• evaluate past patterns of resource use, trends and developments</li> <li>• identify need for supplementary products and services, including required range and quantity</li> <li>• research options available to meet needs that minimize risk</li> <li>• assess costs and benefits for options available</li> <li>• select best options/strategies, e.g., purchase or rent equipment, issue a request for proposals for services</li> <li>• adjust activities if products/services are not available</li> <li>• record best options/strategies and financial information</li> <li>• evaluate and determine best housing method, e.g., housing bureau, rooming list, online direct to property, etc.</li> </ul>
<p>4.05</p>	<p>Establish milestones and critical path</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• tasks and phases required for meeting or event</li> <li>• interdependence of tasks and phases</li> <li>• schedule development and revision</li> <li>• planning and managing projects</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify specific, realistic, measurable and achievable tasks and phases required to meet meeting or event objectives</li> <li>• set goals and objectives</li> <li>• prioritize goals and objectives</li> <li>• determine links, dependencies, timelines and critical dates</li> <li>• estimate task durations</li> <li>• assign tasks to specific committees or individuals</li> <li>• schedule regular review of critical path</li> <li>• identify potential risks</li> <li>• adjust critical path as needed</li> </ul>

<p>4.06</p>	<p>Develop integrated communication plan</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• applicable legislation, e.g., intellectual rights, privacy</li> <li>• organizational structure</li> <li>• strategic plan and goals</li> <li>• differences (e.g., priorities, views) of respective stakeholders, e.g., intra-departmental, project team, external</li> <li>• marketing, public relations, and communications plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• design meeting or event communication plan that will complement or integrate with organization’s communication plan, internal organization’s plan and external stakeholders’ plan</li> <li>• establish standardized documentation and document design procedures</li> <li>• develop information retrieval systems</li> <li>• create information collection policies, procedures and structures</li> <li>• construct information distribution policies, procedures and structures</li> <li>• generate policies and procedures to maintain system security and integrity, e.g., develop privacy policy, develop accessibility policy</li> <li>• set up data reporting and monitoring systems</li> <li>• establish record-keeping and filing systems</li> <li>• develop information preservation and archiving policies and procedures</li> <li>• create plan for site communication, e.g., use of two-way radios, protocols, emergency contacts, risk management plan, on-site logistics</li> <li>• source and select technology for site communication</li> <li>• analyze and select different technologies, e.g., database, paper filing system</li> </ul>
<p>4.07</p>	<p>Develop evaluation/audit procedures</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• evaluation processes and procedures</li> <li>• generally accepted accounting principles</li> <li>• setting measureable objectives</li> <li>• meeting or event-related elements or activities that may be evaluated/audited before, during and after meeting or event</li> <li>• stakeholder requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define purpose of evaluation/audit</li> <li>• identify areas to be evaluated, e.g., mission, goals, program, sponsorship program, attendance, finances</li> <li>• determine critical success factors for meeting or event, i.e., benchmarks</li> <li>• design evaluation/audit procedures, for example:             <ul style="list-style-type: none"> <li>- determine who will conduct evaluation/audit</li> <li>- identify information required for evaluation/audit, e.g., plans, budgets, variance reports, progress reports</li> </ul> </li> <li>• select date(s) for implementation</li> <li>• establish reporting process</li> </ul>

**SKILL 5** Manage Meeting or Event Project

 5 Years

 Daily



**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Organizational policies and procedures
- Organizational structure

Subskills		Knowledge and Abilities
5.01	Manage critical path	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• critical path and review schedule</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify specific tasks and projects required to achieve mission, goals and objectives of meeting or event</li> <li>• prioritize tasks and projects</li> <li>• determine timelines and critical dates</li> <li>• create meeting or event briefs outlining relevant information for specific stakeholders, e.g., committee members, suppliers, agencies, project team</li> <li>• assign tasks to specific groups or individuals based on skills or areas of expertise</li> <li>• schedule regular review of critical path:                             <ul style="list-style-type: none"> <li>- assess variations between estimated and actual time</li> <li>- analyze resource deficiencies and overages</li> </ul> </li> <li>• take corrective action based on results of review</li> <li>• keep key personnel informed of progress and changes</li> </ul>
5.02	Manage contracts	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• principles of negotiation, stages of negotiating process and different negotiation techniques</li> <li>• components of legal contracts</li> <li>• meeting or event and organization’s requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify requirements for contract:                             <ul style="list-style-type: none"> <li>- prepare specifications</li> </ul> </li> <li>• communicate request for proposal process to potential suppliers of goods and services</li> <li>• evaluate proposals against criteria</li> <li>• negotiate contracts:                             <ul style="list-style-type: none"> <li>- strive for beneficial outcomes for all parties involved</li> <li>- determine what is negotiable and non-negotiable</li> <li>- explain organization’s position and viewpoint</li> <li>- listen to and validate other parties’ positions and viewpoints</li> <li>- discuss options</li> <li>- agree on most viable options, e.g., service, timelines</li> <li>- decide on sources of information for evaluation</li> </ul> </li> <li>• consult legal opinion, if needed</li> <li>• integrate contractual obligations into meeting or event’s critical path</li> <li>• maintain productive relationship with contractors:                             <ul style="list-style-type: none"> <li>- monitor progress on a regular basis to ensure organization and contractors are fulfilling obligations</li> <li>- agree on action to rectify non-compliance</li> <li>- deal with breaches of contract within acceptable time frame</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>• assess contractors’ performance to identify strengths and weaknesses</li> <li>• monitor contractors’ expenditures against contract</li> <li>• compare organization’s performance against contract (evaluate own performance)</li> </ul>
<p>5.03</p>	<p>Manage running of meeting or event</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• critical path and schedule</li> <li>• on-site resources and personnel</li> <li>• on-site meeting or event management</li> <li>• integrated communication plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• follow agreed-upon plans for meeting or event</li> <li>• maintain flow/sequence of activities during meeting or event</li> <li>• ensure all resources, personnel and supports are in place and ready</li> <li>• make sure all personnel and participants are briefed, e.g., submit event guide to all stakeholders</li> <li>• provide authorizations for elements of meeting or event to take place, where necessary</li> <li>• receive and distribute funding</li> <li>• oversee the work of key personnel and other stakeholders throughout meeting or event:                             <ul style="list-style-type: none"> <li>- follow integrated communications plan</li> </ul> </li> <li>• implement risk management techniques and strategies to minimize disruption to participants and attendees and to deal with problems that arise</li> <li>• keep key personnel informed of progress and changes</li> <li>• maintain records</li> </ul>

**SKILL 6** Manage Risk Management Plan

 8 Years

 Routinely/Regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event plans, e.g., critical path
- Common risk factors
- Common risk management procedures

Subskills		Knowledge and Abilities
6.01	Identify risks	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• research methods</li> <li>• importance of risk management</li> <li>• organizational resources</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review meeting or event plan, e.g., type of meeting or event, location of meeting or event, time of year, time of day, duration of meeting or event, profile of attendees, number of attendees</li> <li>• review any investigations of previous incidents</li> <li>• determine scope and nature of legal, ethical and regulatory obligations:                             <ul style="list-style-type: none"> <li>- consider range of legal and regulatory issues, e.g., contracts</li> <li>- determine jurisdictions responsible, e.g., national and local governments</li> <li>- identify legislation, codes, ordinances, mandates and regulations applicable to meeting or event and its operations</li> <li>- identify authorities, agencies or governing bodies responsible</li> <li>- determine process for acquiring authorizations</li> </ul> </li> <li>• consult with other relevant individuals, e.g., colleagues, clients, contractors, performers, legal, security personnel, venues</li> <li>• evaluate venue and geographic location for potential hazards, threats, vulnerabilities or other risks</li> <li>• assess the need for specialist advice or assistance in addressing legal, regulatory and jurisdictional requirements</li> <li>• conduct risk assessment</li> </ul>
6.02	Analyze risks	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• authorities, agencies and governing bodies that preside over specific activities within a jurisdiction</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine:                             <ul style="list-style-type: none"> <li>- what is exposed to damage, loss or liability, e.g., property, persons, cash, reputation, environment</li> <li>- what could cause damage, loss or liability</li> <li>- who could suffer damage, loss or liability</li> <li>- when damage, loss or liability might occur</li> </ul> </li> </ul>
6.03	Develop management and implementation plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• authorities, agencies and governing bodies that preside over specific activities within a jurisdiction</li> <li>• risk analysis</li> <li>• organizational structure</li> <li>• legislation, regulations and possible impacts on plan</li> <li>• location situational analysis</li> </ul>

		<ul style="list-style-type: none"> <li>• risk management options, for example: <ul style="list-style-type: none"> <li>- loss prevention, e.g., security, incorporation, copyright</li> <li>- risk financing, e.g., insurance, hold backs, payments, liens</li> <li>- risk control, e.g., safety precautions, safety training, maintenance programs</li> </ul> </li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• evaluate options to meet legal requirements and mitigate risks: <ul style="list-style-type: none"> <li>- seek advice from regulatory authorities and specialists</li> <li>- put supports in place to minimize risks</li> </ul> </li> <li>• identify health and safety requirements: <ul style="list-style-type: none"> <li>- select available options to meet requirements</li> </ul> </li> <li>• establish risk management policies and procedures, e.g., travel policy concerning insurance requirements or number of individuals from one organization on the same flight: <ul style="list-style-type: none"> <li>- seek input from regulatory authorities and specialists, e.g., underwriters</li> <li>- obtain approval from supervisor/leadership</li> </ul> </li> <li>• prepare risk management plan, including: <ul style="list-style-type: none"> <li>- chain of command</li> <li>- emergency and control procedures</li> <li>- spokesperson</li> <li>- implementation strategies, e.g., decision-making authority, resource requirements, coordination requirements</li> </ul> </li> <li>• gain support of organization and key personnel for risk management</li> <li>• implement plan to manage risks</li> <li>• communicate plan and procedures, e.g., to emergency services, media, suppliers, senior management and staff</li> <li>• assess risk management plan on ongoing basis</li> <li>• comply with regulations, where applicable</li> <li>• consult experts, where needed</li> <li>• obtain insurance: <ul style="list-style-type: none"> <li>- review insurance coverage needs and levels periodically</li> <li>- update insurance coverage as needed</li> </ul> </li> </ul>
6.04	Develop and implement emergency response plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• local- and venue-specific emergency response protocols</li> <li>• decision-making authority</li> <li>• emergency response plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• conduct a threat assessment to identify potential threats, hazards or emergencies, e.g., earthquake, disease outbreak, hazardous material spill, utility failure, bomb threat, structure collapse</li> <li>• perform a capability assessment to determine resources available to respond to an emergency, e.g., medical, fire, rescue, security</li> <li>• confer with authorities to determine requirements and appropriate emergency procedures, for example: <ul style="list-style-type: none"> <li>- access, egress and locations for emergency services</li> <li>- exit route configuration for site evacuation</li> <li>- on-site medical services required, e.g., number and locations of first-aid stations and emergency medical technicians</li> <li>- internal and external communication systems</li> <li>- roles, responsibilities, lines of authority and delegation of duties</li> </ul> </li> <li>• implement emergency response plans and communication procedures</li> <li>• carry out contingency and business continuity plans as appropriate</li> </ul>

6.05	Arrange security	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• risk analysis</li><li>• types of security alternatives</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• determine needs, considering:<ul style="list-style-type: none"><li>- type of meeting or event</li><li>- hours of operation</li><li>- type of venue</li><li>- types of activities, e.g., serving alcohol</li><li>- number and nature of attendees and VIPs</li><li>- number and nature of entrances and exits</li><li>- traffic patterns</li><li>- insurance requirements</li></ul></li><li>• comply with legislation</li><li>• inform authorities—e.g., fire, police—of meeting or event time, dates and activities</li><li>• arrange for:<ul style="list-style-type: none"><li>- security staff and facilities</li><li>- training for staff and volunteers</li><li>- accreditation for security staff</li></ul></li><li>• attain certificates of insurance from suppliers:<ul style="list-style-type: none"><li>- obtain additional coverage, as needed</li></ul></li><li>• detail security procedures for emergency situations, for example:<ul style="list-style-type: none"><li>- crowd control</li><li>- site evacuation</li><li>- natural disaster</li><li>- terrorist activities</li></ul></li><li>• implement internal and external security communication systems</li><li>• establish system for reporting and recording incidents</li></ul>
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**SKILL 7** Develop Financial Resources

 5 Years

 Routinely/Regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features, budget and decision deadline
- Applicable legislation and legally binding documents, e.g., contracts
- Meeting or event plans, e.g., critical path
- Target markets

Subskills		Knowledge and Abilities
7.01	Manage sponsorship process	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• sponsorship goals/targets including on-site and post-meeting or event deliverables</li> <li>• sponsorship protocols, e.g., preferred method of communication</li> <li>• sponsorship restrictions and constraints, e.g., regulations</li> <li>• measurement procedures</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• establish sponsorship levels:                             <ul style="list-style-type: none"> <li>- identify financial or in-kind values for each level</li> <li>- define benefits for each level</li> <li>- estimate costs for providing benefits</li> </ul> </li> <li>• obtain support of key stakeholders for proposed sponsorship arrangements</li> <li>• seek legal opinion as needed</li> <li>• identify potential sponsors, considering:                             <ul style="list-style-type: none"> <li>- compatibility with meeting or event</li> <li>- exclusivity</li> <li>- income or cost-avoidance goals</li> <li>- advertising and budget limitations</li> </ul> </li> <li>• produce sponsor benefit packages containing:                             <ul style="list-style-type: none"> <li>- overview and history of meeting or event</li> <li>- corporate identity to be presented, e.g., use of logos</li> <li>- value for sponsorship</li> <li>- letter of proposal</li> <li>- audience demographics</li> <li>- return-on-investment measures and opportunities</li> <li>- sponsorship benefits and limitations</li> <li>- pre-event/meeting sponsorship restrictions</li> </ul> </li> <li>• distribute sponsor benefit packages to potential sponsors</li> <li>• contact potential sponsors, e.g., primary decision-maker or person of influence:                             <ul style="list-style-type: none"> <li>- determine type of support available, e.g., cash, discounts, products</li> <li>- establish relationships with sponsors' creative agencies</li> <li>- negotiate sponsor commitment, e.g., distribution, product sales, set-up, tear-down, sampling</li> </ul> </li> <li>• consider how sponsors may complement or conflict with each other</li> <li>• prepare contracts for committed sponsors, outlining:                             <ul style="list-style-type: none"> <li>- details of meeting or event</li> <li>- responsibilities of both parties, e.g., liabilities, personnel, entertainment</li> <li>- financial obligations</li> <li>- release forms and waivers</li> <li>- policy regarding meeting or event cancellation</li> <li>- insurance requirements</li> </ul> </li> <li>• maintain relationships with sponsors, e.g., provide regular updates</li> <li>• manage contractual fulfillment, e.g., delivery of benefits</li> <li>• follow up, e.g., evaluate sponsor involvement, return on investment from sponsors' points of view</li> </ul>

7.02	Manage donor process	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• financial targets for donors</li> <li>• public relations and marketing plan</li> <li>• establishing partnerships and alliances</li> <li>• previous donor list for event or meeting</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify potential donors</li> <li>• specify possible donor opportunities</li> <li>• determine need for donor recognition</li> <li>• develop donor recognition program, e.g., benefactor, friend, supporter</li> <li>• coordinate approach for soliciting potential donors</li> <li>• contact potential donors: <ul style="list-style-type: none"> <li>- outline how donations will be used and expectations will be met</li> <li>- request specific contribution if appropriate</li> </ul> </li> <li>• implement donor recognition program</li> <li>• carry out communications plan</li> </ul>
7.03	Manage program funding process	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• financial targets for funding</li> <li>• funding sources, e.g., grants, government programs, sponsors, registrations, products</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review budget and set goals for funding</li> <li>• research potential funding sources, e.g., government, corporations, foundations, associations: <ul style="list-style-type: none"> <li>- identify available funding, e.g., grants</li> <li>- determine eligibility for funding</li> <li>- identify contact persons</li> </ul> </li> <li>• obtain and complete applications</li> <li>• compile support materials, for example: <ul style="list-style-type: none"> <li>- letters of recommendation</li> <li>- budgets/financial statements</li> <li>- business plans</li> <li>- benefits</li> </ul> </li> <li>• submit applications and support materials to appropriate parties</li> <li>• follow up on status of applications, e.g., by telephone, send letter</li> <li>• meet requirements of funding that is awarded, e.g., reporting</li> </ul>
7.04	Manage registration process	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• financial targets for registration</li> <li>• previous registration list for meeting or event</li> <li>• public relations and marketing plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify potential attendees and types of attendees</li> <li>• communicate attendee benefits in pre-registration information packet containing: <ul style="list-style-type: none"> <li>- overview and history of meeting or event</li> <li>- location of and cost to attend meeting or event</li> <li>- identity of meeting or event sponsor</li> <li>- educational value of attending</li> <li>- meeting or event agenda</li> <li>- criteria for acceptance of registration (if applicable)</li> <li>- additional programming offerings, e.g., tours, spouse programming, hospitality</li> </ul> </li> <li>• identify potential supplier partners, i.e., application service provider, full-service registration contractor</li> </ul>

**SKILL 8** Manage Budget

 3 Years

 Routinely/Regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Financial goals
- Financial statements and management systems

Subskills		Knowledge and Abilities
8.01	Develop budget	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• scope of meeting or event</li> <li>• meeting or event objectives</li> <li>• type of insurance</li> <li>• basic accounting principles</li> <li>• required budget format</li> <li>• organization’s cash flow</li> <li>• fluctuations in currency</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define budget format and categories</li> <li>• identify, access and interpret data and data sources needed for budget preparation, e.g., previous budgets, audits</li> <li>• analyze internal and external factors for potential impacts on budget, e.g., new legislation, market trends</li> <li>• determine potential sources of revenue, for example:                             <ul style="list-style-type: none"> <li>- grants</li> <li>- sponsorships</li> <li>- sales, e.g., ticket sales, souvenirs</li> <li>- registration</li> <li>- advertising</li> <li>- exhibitor fees</li> </ul> </li> <li>• allocate budget amounts for meeting or event activities, for example:                             <ul style="list-style-type: none"> <li>- programming</li> <li>- production</li> <li>- marketing</li> <li>- administration</li> <li>- human resources, e.g., volunteers, staff</li> <li>- transportation</li> <li>- food and beverage</li> <li>- accommodations</li> <li>- shipping costs</li> <li>- insurance</li> <li>- taxes</li> <li>- gratuities</li> </ul> </li> <li>• establish contingency plan and funds</li> <li>• create chart of accounts:                             <ul style="list-style-type: none"> <li>- break down into weekly or monthly budgets</li> <li>- detail projected cash flow</li> </ul> </li> <li>• specify fixed and variable costs</li> <li>• comply with budget control guidelines, e.g., payment policies and procedures, cost controls, deposit policies and procedures for cash, credit cards and payments</li> <li>• schedule regular budget reviews</li> </ul>

		<ul style="list-style-type: none"> <li>• submit budget for approval, if necessary, e.g., to senior management, partners or organization: <ul style="list-style-type: none"> <li>- revise budget as required</li> </ul> </li> <li>• communicate budget decisions to those affected</li> </ul>
8.02	Establish pricing	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• profit requirements and desired profit margin</li> <li>• cost of sales</li> <li>• attendee income profiles</li> <li>• annual consumer price index trends</li> <li>• currency and credit card procedures for multi-national meetings or events</li> <li>• credit card handling costs</li> <li>• currency fluctuations</li> <li>• pricing information of similar meetings or events (past and present)</li> <li>• tax structures in host location</li> <li>• perceived market value of products and services</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• collect and analyze information related to current market conditions</li> <li>• calculate direct and indirect costs</li> <li>• establish pricing structure, e.g., percentage increase or cost plus, member discount rates</li> </ul>
8.03	Establish financial controls and procedures	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• cash flow requirements, e.g., human resources, marketing, inventory, logistics/operations</li> <li>• organization's policies and procedures concerning financial controls, e.g., banking procedures and policies</li> <li>• tax implications and reporting requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• schedule regular budget reviews to: <ul style="list-style-type: none"> <li>- compare actual to projected costs and revenues</li> <li>- analyze variances</li> <li>- identify revisions needed</li> </ul> </li> <li>• determine acceptable forms of payment, e.g., cash, cheque, credit, debit: <ul style="list-style-type: none"> <li>- take into account transactions fees</li> </ul> </li> <li>• make arrangements for credit, e.g., credit accounts with suppliers</li> <li>• establish systems and controls, for example: <ul style="list-style-type: none"> <li>- two signatures on cheques <ul style="list-style-type: none"> <li>- purchase orders</li> <li>- recorded change orders</li> <li>- inventory control and tracking systems</li> <li>- on-site cash management procedures</li> <li>- approvals</li> </ul> </li> </ul> </li> <li>• monitor systems and controls, for example: <ul style="list-style-type: none"> <li>- establish internal and external audit procedures</li> <li>- produce month-end reports</li> <li>- check bank reconciliations</li> <li>- produce balance statements</li> </ul> </li> </ul>

8.04	Manage cash flow	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• internal, local and international accounting procedures, as required</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review accounting procedures regularly: <ul style="list-style-type: none"> <li>- examine receivables, payables, inventory and cash flow</li> </ul> </li> <li>• examine financial statements monthly for accuracy</li> <li>• assess cash management procedures for effectiveness and security</li> <li>• inform key personnel immediately if fraudulent activities are identified</li> </ul>
8.05	Monitor budget performance	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• budget control guidelines</li> <li>• importance of budget control</li> <li>• reporting mechanisms and audit procedures</li> <li>• performance indicators</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• adhere to budget control guidelines and respond to variances</li> <li>• monitor revenues and expenses within established time frames: <ul style="list-style-type: none"> <li>- review bank reconciliations, expenses and variance</li> <li>- compare budgeted amounts to actual amounts</li> </ul> </li> <li>• identify variances between budgeted and actual figures: <ul style="list-style-type: none"> <li>- determine cause(s)</li> <li>- identify impacts</li> <li>- respond accordingly, e.g., revise activities, reallocate funds</li> <li>- communicate information and decisions to those affected</li> </ul> </li> <li>• define opportunities for improved budget performance: <ul style="list-style-type: none"> <li>- proactively source new suppliers and revenue streams</li> <li>- discuss desired budgetary outcomes with colleagues</li> <li>- present recommendations to appropriate individuals or departments</li> </ul> </li> <li>• obtain approval for amended budget, where required</li> <li>• pursue ideas for increasing income or reducing expenditures</li> <li>• communicate budget performance to key personnel</li> <li>• complete financial reports: <ul style="list-style-type: none"> <li>-deliver to stakeholders</li> </ul> </li> </ul>
8.06	Revise budget	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• budget development/revision guidelines</li> <li>• limits of authority, and authority of others, e.g., who has signing authority</li> <li>• communication requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• revise or propose revisions to budget, e.g., reallocate funds to cover unexpected expenditures or revenues</li> <li>• seek approval as required</li> <li>• update plan as required</li> <li>• communicate with impacted vendor or stakeholder, as needed</li> </ul>

## SKILL 9 Manage Monetary Transactions



1 Year



Routinely/Regularly



3

### Common Knowledge:

- Financial accounting and internal controls and procedures
- Security measures

Subskills		Knowledge and Abilities
9.01	Establish cash handling procedures	<b>Ability to:</b> <ul style="list-style-type: none"> <li>• communicate policies and procedures to staff and volunteers</li> <li>• take steps to prevent theft</li> <li>• coordinate money handling:               <ul style="list-style-type: none"> <li>- set up central cash office</li> <li>- establish record-keeping systems, e.g., receipts</li> <li>- set up cash collection and deposit systems</li> <li>- arrange for security and audit systems</li> </ul> </li> </ul>
9.02	Monitor cash handling procedures	<b>Ability to:</b> <ul style="list-style-type: none"> <li>• review security procedures</li> <li>• monitor revenues and expenses</li> <li>• monitor cash handling procedures</li> <li>• monitor audit documentation</li> <li>• revise procedures as needed</li> </ul>

## SKILL 10 Perform Administrative Tasks

 2 Years

 Daily

### Common Knowledge:

- Basic technology terminology
- Applicable legislation, e.g., protection of data and privacy
- Organizational policies and procedures

Subskills		Knowledge and Abilities
10.01	Coordinate office administration	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• operating and maintenance guidelines for office equipment</li> <li>• attendee needs, e.g., required use of fax machine in the absence of Internet service</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• standardize administrative functions, e.g., systems, policies and procedures for record-keeping, selecting/purchasing supplies and equipment, maintaining equipment</li> <li>• monitor administrative functions to ensure they are being completed as required</li> <li>• ensure routine maintenance is carried out and/or planned: <ul style="list-style-type: none"> <li>- arrange service agreements with supplier as required</li> </ul> </li> </ul>
10.02	Manage information system	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• budget allocation for information system</li> <li>• types of information to be managed</li> <li>• information interface, e.g., human to non-human (how it will happen)</li> <li>• audit trail, e.g., paper, electronic</li> <li>• data storage and retrieval requirements</li> <li>• security requirements</li> <li>• business writing formats, e.g., letters/correspondence</li> <li>• filing systems and protocols for electronic and paper files</li> <li>• storage options, e.g., in-house, off-site</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify information to be managed and resources available</li> <li>• standardize document protocols, e.g., naming protocol</li> <li>• design system that meets needs and budget, e.g., set up integrated filing system for electronic and other files</li> <li>• provide training to users</li> <li>• monitor use of information system</li> <li>• assess and adjust information systems to better meet stakeholder needs</li> <li>• review records storage system: <ul style="list-style-type: none"> <li>- keep records accurate and current, e.g., delete outdated records</li> </ul> </li> <li>• maintain security of information system, e.g., require passwords for access to records, secure essential records off-site</li> <li>• follow procedures for back-up of electronic files</li> <li>• resolve problems</li> </ul>
10.03	Write reports	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• organizational reporting requirements, e.g., reports, research, deadlines</li> <li>• audience</li> <li>• research techniques and methods</li> <li>• relevant sources of information</li> <li>• report formats, structures and styles for commonly used business documents</li> <li>• business writing skills</li> <li>• effect of formatting on readability and appearance of documents</li> </ul>

- options for presentation, e.g., design, layout
- options for security, e.g., “read-only”
- capabilities and limitations of computer software programs, e.g., where to access manuals, user documentation and online help

**Ability to:**

- use computer hardware and software, e.g., word processing software, spreadsheet software
- research information using formal and informal methods
- organize information to assist analysis
- analyze and assess data for relevance
- identify key ideas to develop a clear message
- determine document purpose, audience and presentation requirements with appropriate personnel
- design structure and layout, considering needs of audience
- use language and style appropriate to audience
- input text and data into format
- edit and proofread
- obtain feedback and approvals, as necessary
- follow information management system protocols, e.g., follow file naming convention, create back-up file



**SKILL 11** Manage Human Resource Plan

 5 Years

 Routinely/Regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Job descriptions
- Current and emerging approaches on managing workplace diversity
- Organizational policies and procedures
- Applicable legislation, e.g., labor, liquor
- Labor agreements, if applicable
- Organizational structure
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
11.01	Determine workforce requirements	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• requirements of meeting or event plans</li> <li>• project hours</li> <li>• seasonal needs</li> <li>• benefits and implications of workplace diversity</li> <li>• staff turnover rate and reasons for turnover</li> <li>• suppliers’ obligations and deliverables</li> <li>• labor regulations</li> <li>• existing staff and volunteers</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• conduct task/function analysis</li> <li>• assess benefits, costs and risks to organization in relation to volunteer involvement, e.g., requirement for additional insurance</li> <li>• define roles and responsibilities of staff and volunteers:                             <ul style="list-style-type: none"> <li>- determine what needs to be outsourced (contracted)</li> </ul> </li> <li>• determine human resources needed for particular meeting or event, e.g., required employees or outsourced (contracted) positions</li> <li>• identify human resources needed for organization</li> <li>• establish wage rates and salary expectations</li> <li>• develop plans that show respect for workplace diversity</li> <li>• select recruitment techniques to address shortfalls, e.g., hire contractors</li> </ul>
11.02	Establish workforce policies and procedures	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• shift requirements/project requirements</li> <li>• team-building principles and practices</li> <li>• labor agreements, where applicable</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• establish policies in applicable areas, such as:                             <ul style="list-style-type: none"> <li>- recruitment</li> <li>- orientation</li> <li>- training</li> <li>- supervision</li> <li>- performance reviews</li> <li>- conflict resolution</li> <li>- discipline</li> <li>- termination</li> <li>- roles and responsibilities</li> <li>- rewards and recognition, e.g., volunteer rewards</li> <li>- sick leave</li> </ul> </li> <li>• ensure that proposed policies and procedures comply with legislation</li> <li>• communicate policies and procedures to staff</li> <li>• monitor implementation of policies and procedures</li> </ul>

<p>11.03</p>	<p>Develop training plan</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• performance expectations/roles and responsibilities</li> <li>• local employment conditions</li> <li>• working culture and practices of industry sector</li> <li>• learning initiatives and arrangements that apply to industry sector</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• assess current skills and abilities of staff/volunteers and organization as a whole</li> <li>• determine gaps in training, e.g., examine common customer complaints, review changes to technology</li> <li>• prioritize training needs:                             <ul style="list-style-type: none"> <li>- identify most suitable method for training</li> </ul> </li> <li>• estimate time required to complete training</li> <li>• research current training trends</li> <li>• review budget and determine funds available for training</li> <li>• set measurable objectives</li> <li>• address gaps in training through external or internal training strategies</li> <li>• develop criteria to evaluate success of training plans, e.g., tests</li> <li>• put resources and policies in place to support training, e.g., time off to attend sessions</li> <li>• identify specialists or expertise needed to provide instruction</li> </ul>
<p>11.04</p>	<p>Monitor human resource plan</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• local employment conditions</li> <li>• staff turnover rates for industry</li> <li>• staffing shortfalls</li> <li>• current skills and abilities of staff/volunteers</li> <li>• current wage rates</li> <li>• performance appraisal process</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• measure staff turnover and reasons for leaving</li> <li>• adjust human resources to address trends and issues</li> <li>• review and update job descriptions</li> <li>• conduct performance appraisals</li> <li>• conduct exit interviews</li> </ul>

**SKILL 12** Acquire Staff and Volunteers

 3 Years

 Occasionally

     4

**Common Knowledge:**

- Job descriptions
- Applicable legislation, e.g., labor
- Organizational structure
- Organizational policies and procedures
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
12.01	Develop selection criteria	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• local employment conditions</li> <li>• local labor laws</li> <li>• skill sets required for specific positions</li> <li>• local terms and conditions applied to volunteers, where applicable</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• seek input from current staff about duties and responsibilities</li> <li>• review documentation as required, for example:                             <ul style="list-style-type: none"> <li>- organizational chart</li> <li>- comments from exit interviews</li> </ul> </li> <li>• document job requirements, for example:                             <ul style="list-style-type: none"> <li>- job title</li> <li>- summary of duties</li> <li>- required qualifications and skill sets</li> <li>- level of responsibility, authority and accountability</li> <li>- wages and/or benefits</li> <li>- days/hours of work or time commitment required</li> <li>- grooming and dress codes</li> <li>- option for job to be conducted outside of office, i.e., ‘virtually’</li> </ul> </li> </ul>
12.02	Recruit staff and volunteers	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• recruiting methods</li> <li>• costs associated with recruitment</li> <li>• budget restrictions</li> <li>• sources for volunteers</li> <li>• security checks</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine best methods for recruiting target group, for example:                             <ul style="list-style-type: none"> <li>- promote opportunities through local media</li> <li>- promote within organization</li> <li>- seek referrals through networking</li> <li>- participate in work education programs</li> <li>- review applications</li> <li>- contact or hire employment agency</li> </ul> </li> <li>• ensure process is fair, consistent, and effective</li> <li>• design recruitment ads if required, including:                             <ul style="list-style-type: none"> <li>- job description</li> <li>- minimum qualifications</li> <li>- how to apply</li> <li>- deadline for applying</li> <li>- contact information</li> </ul> </li> <li>• ensure recruitment information is clear and accurate</li> </ul>

		<ul style="list-style-type: none"> <li>• consult with supervisors to assist with recruitment</li> <li>• implement recruiting method, e.g., attend job trade fair</li> <li>• screen applicants by comparing applications to requirements:             <ul style="list-style-type: none"> <li>- complete pre-employment security or police record checks, if required</li> </ul> </li> <li>• select applicants for interview process based on objective criteria</li> </ul>
<p>12.03</p>	<p>Interview candidates</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• evaluation criteria</li> <li>• labor laws</li> <li>• effective interviewing protocols, e.g., preparing post-interview reports for future analysis</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• prepare for the interview, including:             <ul style="list-style-type: none"> <li>- preparing questions and evaluation criteria                 <ul style="list-style-type: none"> <li>- assembling necessary documents, e.g., wage scales, job descriptions</li> <li>- ensuring that content expert is present if necessary, e.g., food and beverage expert</li> <li>- selecting quiet, comfortable place for interview</li> <li>- scheduling applicants</li> </ul> </li> </ul> </li> <li>• greet applicant and put at ease</li> <li>• introduce self and other members of the interview team</li> <li>• review key information from application form</li> <li>• provide applicant with overview of organization and proposed position</li> <li>• gain insight into applicant’s personality and skills by asking open-ended questions, e.g., inquiring about strengths and weaknesses</li> <li>• explain the selection process</li> <li>• encourage questions</li> <li>• determine applicant’s available starting date and compensation expectations</li> <li>• record comments and ratings based on evaluation criteria</li> </ul>
<p>12.04</p>	<p>Select best candidates and offer positions</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• evaluation criteria</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review comments and ratings from interview forms</li> <li>• rank candidates</li> <li>• contact references to verify information, e.g., past performance, dates of employment</li> <li>• perform other security or reference checks, e.g., driver’s abstract, police record check</li> <li>• test candidate’s skills, if applicable</li> <li>• select most suitable candidate and alternates</li> <li>• contact most suitable candidate to offer position and confirm details, e.g., commencement date, benefits</li> <li>• allow reasonable time frame for response</li> <li>• determine reason if candidate declines offer</li> <li>• provide written offer if candidate accepts:             <ul style="list-style-type: none"> <li>- may include a contract and confidentiality or privacy agreement</li> </ul> </li> <li>• notify unsuccessful candidates</li> <li>• process and file documentation</li> </ul>

**SKILL 13 Train Staff and Volunteers**

 3 Years

 Occasionally

     4

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event features and details
- Job descriptions
- Applicable legislation, e.g., labor
- Labor agreements, if applicable
- Organizational structure
- Organizational policies and procedures
- Communication protocols and reporting structures
- Current knowledge, understanding and skills of staff
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
13.01	Provide orientation	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• orientation and training procedures</li> <li>• company expectations and hiring guidelines</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• liaise with colleagues to ensure orientation is conducted in a way that minimizes disruptions</li> <li>• welcome new staff/volunteers to the organization</li> <li>• inform staff/volunteers about organization, e.g., structure, policies and procedures, culture</li> <li>• clarify roles, responsibilities and levels of authority</li> <li>• encourage questions</li> <li>• conduct tour of workplace or meeting or event site</li> <li>• introduce staff/volunteers to others in the organization</li> <li>• provide documentation, if needed, e.g., meeting or event briefing</li> <li>• identify areas that may require training, for example:                             <ul style="list-style-type: none"> <li>- knowledge of legislation, e.g., liquor laws</li> <li>- cash controls</li> <li>- communication devises</li> <li>- expense accounts</li> <li>- office equipment operation</li> <li>- emergency/risk management procedures</li> <li>- use of technology</li> </ul> </li> <li>• finalize and file documentation</li> </ul>
13.02	Provide training	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• training program development and delivery methods</li> <li>• subject matter to be taught</li> <li>• learning styles and teaching methods</li> <li>• roles of staff, including limits of responsibilities and their personal work objectives</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• assess training needs, physical and financial resources and time restrictions</li> <li>• set measurable objectives</li> <li>• research existing programs</li> <li>• prepare training programs, including:                             <ul style="list-style-type: none"> <li>- subject(s)</li> <li>- list of participants</li> <li>- method of delivery to meet learning styles of participants</li> <li>- equipment required</li> <li>- opportunities for practice</li> </ul> </li> </ul>

- |  |   |
|--|---|
|  | <ul style="list-style-type: none"><li>- length of program</li><li>- time, date and location</li><li>- instructors</li><li>- method of evaluation<ul style="list-style-type: none"><li>• conduct training session</li></ul></li><li>• recognize successful completion of training</li><li>• evaluate effectiveness of training program</li><li>• adjust program if necessary</li></ul> |
|--|---|

**SKILL 14** Manage Workforce Relations

 10 Years

 Daily

  5

**Common Knowledge:**

- Job descriptions
- Applicable labor legislation
- Labor agreements, if applicable
- Organizational structure, policies and procedures
- Performance expectations

Subskills		Knowledge and Abilities
14.01	Supervise staff and volunteers	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• good practices, e.g., importance of feedback, conflict resolution</li> <li>• mentoring and coaching</li> <li>• methods of recognizing and rewarding employees</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• model high standards of performance and behavior, e.g., promote acceptance of workplace diversity</li> <li>• communicate expectations, roles and responsibilities of team members and leaders</li> <li>• promote teamwork</li> <li>• encourage effective communication</li> <li>• resolve conflicts</li> <li>• coach and mentor staff</li> <li>• delegate tasks and responsibilities</li> <li>• monitor individual and team performance towards goal(s)</li> <li>• provide regular feedback on job performance</li> <li>• identify training needs and set priorities with staff</li> <li>• address performance problems</li> </ul>
14.02	Motivate staff and volunteers	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• motivational techniques, e.g., empowerment, providing sense of ownership</li> <li>• importance of maximizing volunteer retention</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify individual motivational needs of staff and volunteers, e.g., socialization, experience, acknowledgement, status</li> <li>• accommodate individual needs</li> <li>• provide additional guidance and training</li> <li>• use positive reinforcement</li> <li>• employ incentives where appropriate</li> <li>• recognize and reward efforts, e.g., letter, recognition event, gift, letter of achievement</li> </ul>
14.03	Manage teams	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• purpose of team</li> <li>• required mix of expertise, knowledge and skills to achieve team purpose</li> <li>• leadership styles</li> <li>• team dynamics and stages of growth</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• communicate purpose of team clearly</li> <li>• set measurable objectives</li> <li>• identify staff/volunteers' areas of expertise, knowledge, skills, attitudes and their roles within the team</li> </ul>

		<ul style="list-style-type: none"> <li>• select staff/volunteers to build team and recruit staff to fill in gaps</li> <li>• agree on acceptable team behaviors that will help team achieve goals</li> <li>• facilitate introduction of new team members</li> <li>• review team performance at critical points, e.g., review key performance indicators</li> <li>• encourage open communication between team members to:             <ul style="list-style-type: none"> <li>- provide feedback on each other and team as a whole</li> <li>- find solutions to problems</li> </ul> </li> <li>• help individuals understand their contributions to the team</li> <li>• celebrate team and individual successes</li> <li>• recognize and debrief team when purpose has been achieved</li> <li>• match leadership style with team characteristics</li> </ul>
14.04	Evaluate staff	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• principles for measuring performance</li> <li>• organizational performance policies</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine format of performance review for purposes</li> <li>• provide regular feedback on performance</li> <li>• prepare for periodic performance review, e.g., schedule, review job performance</li> <li>• conduct periodic performance review, including:             <ul style="list-style-type: none"> <li>- state purpose of review</li> <li>- begin and end with positive feedback</li> <li>- compare performance to job requirements</li> <li>- seek input, feedback and discussion</li> <li>- discuss and agree on follow-up plans</li> <li>- update follow-up plans</li> </ul> </li> <li>• document information related to performance</li> </ul>
14.05	Process terminations and resignations	<p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine reasons for resignation, e.g., conduct exit interview</li> <li>• offer reasons for termination</li> <li>• seek approvals:             <ul style="list-style-type: none"> <li>- follow organizational procedures, e.g., consult with supervisor</li> </ul> </li> <li>• provide copies of required documentation</li> <li>• explain details of compensation and benefits, if applicable</li> <li>• take security measures, if necessary, e.g., escort staff off premises, change access and security codes</li> <li>• notify others who may be affected by termination or resignation, e.g., payroll, customers, suppliers</li> <li>• acquire company-owned equipment</li> <li>• complete appropriate documentation</li> </ul>



## SKILL 15 Manage Stakeholder Relationships



7 Years



Routinely/regularly



5

### Common Knowledge:

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event details, e.g., features, critical path

Subskills		Knowledge and Abilities
15.01	Identify stakeholders	<b>Ability to:</b> <ul style="list-style-type: none"> <li>• identify internal and external stakeholders, e.g., clients, officials, sponsors, participants, providers</li> <li>• define stakeholder interest, issues and priorities</li> <li>• determine opportunities and challenges that each stakeholder presents</li> </ul>
15.02	Assess stakeholders	<b>Ability to:</b> <ul style="list-style-type: none"> <li>• determine potential impacts of stakeholders on meeting or event, and vice versa</li> <li>• assess validity, power and urgency of each stakeholder</li> <li>• define stakeholder roles and desired support and resulting obligations</li> <li>• develop plans for acquiring strategic, economic and political alliances locally, regionally and nationally</li> </ul>
15.03	Classify stakeholders	<b>Ability to:</b> <ul style="list-style-type: none"> <li>• categorize stakeholders</li> <li>• prioritize stakeholders according to power, influence and interest</li> <li>• identify linkages between stakeholder groups</li> </ul>
15.04	Manage stakeholder activities	<b>Knowledge of:</b> <ul style="list-style-type: none"> <li>• applicable legislation, e.g., liquor laws, professional codes</li> <li>• appropriate protocols and local customs, e.g., dress code, VIP treatment</li> </ul> <b>Ability to:</b> <ul style="list-style-type: none"> <li>• recognize and integrate varied interests and goals of stakeholders</li> <li>• determine activities that meet the needs of stakeholders, e.g., site tours, pre-launch party, donor appreciation program, committee meetings</li> <li>• acknowledge and monitor stakeholder concerns and capabilities</li> <li>• follow appropriate protocols when communicating with stakeholders</li> <li>• communicate appropriate protocols to stakeholders</li> <li>• sequence and synchronize activities</li> <li>• develop schedules of activities</li> <li>• liaise with all stakeholders</li> </ul>
15.05	Manage stakeholder relationships	<b>Knowledge of:</b> <ul style="list-style-type: none"> <li>• codes of practice and ethics including customer and consumer rights</li> <li>• legal and regulatory requirements</li> <li>• meeting or event products and services</li> <li>• meeting or event stakeholders</li> <li>• stakeholder satisfaction survey methods</li> <li>• strengths and weaknesses of products and services</li> <li>• competitors' activities, products and services</li> </ul>

**Ability to:**

- ensure staff understand expectations of stakeholders
- make sure staff understand their own roles and responsibilities for meeting stakeholder expectations
- empower staff and volunteers to deliver good stakeholder service
- confirm that clear and effective conflict resolution processes are in place
- investigate and resolve reoccurring problems
- communicate acceptable day-to-day behavior that matches organization's values
- recognize contribution of 'front line' staff who work with stakeholders
- establish system to evaluate/monitor stakeholder satisfaction
- make recommendations to improve service

**SKILL 16** Design Program

 5 Years

 Routinely/regularly

  5

**Common Knowledge:**


- Mission statement, goals and objectives of meeting or event and organization
- Creative concept and theme of meeting or event
- Target market(s)
- Previous entertainment/performance programs
- Budgetary restrictions, constraints and financial targets
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
16.01	Determine program components	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• potential program components, e.g., activities, food and beverages, décor and design, educational sessions</li> <li>• structure and sequence of program components</li> <li>• sources of human, physical and financial resources</li> <li>• meeting or event objectives</li> <li>• attendee profile</li> <li>• previous program evaluation results/report</li> <li>• legal and regulatory requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• analyze previous year's(s') program and evaluation report, if applicable</li> <li>• consider meeting or event objectives, and education and learning principles</li> <li>• research new ideas:                             <ul style="list-style-type: none"> <li>- review programs of other similar meeting or events</li> <li>- survey target market(s)</li> <li>- determine attendee expectations, e.g., conduct brainstorming and other idea-generating exercises</li> <li>- identify opportunities for innovation</li> </ul> </li> <li>• identify desired program components, e.g., speakers, entertainment, attractions, activities, ancillary programs</li> <li>• ensure desired components meet legal and regulatory requirements</li> <li>• obtain cost estimates and discuss details with colleagues, as applicable</li> <li>• gain stakeholder support for program components</li> </ul>
16.02	Select program content and delivery formats	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• education and learning principles</li> <li>• theme of meeting or event</li> <li>• desired program components</li> <li>• projected attendance</li> <li>• legal requirements</li> <li>• marketing activities</li> <li>• participation patterns</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• research options, e.g., send out requests for proposals/bids, contact agents and speakers' bureaus, identify key personnel</li> <li>• communicate meeting or event needs with speakers and entertainers</li> <li>• match program format and outcomes to stakeholder objectives</li> <li>• select options that meet needs and constraints, e.g., legal, site, budget, educational goals</li> <li>• consider compatibility to meeting or event objectives, other program components and marketing strategies</li> </ul>

16.03	Structure and sequence program components	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• program components' requirements</li><li>• contract requirements</li><li>• time frame</li><li>• meeting or event critical path</li><li>• site design</li><li>• marketing activities</li><li>• program sequencing tools, e.g., flow charts, Gantt charts, meeting minutes</li><li>• communication plan</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• determine location and duration requirements for each program component</li><li>• consider pace, set-up requirements</li><li>• identify contiguous and concurrent program components</li><li>• accommodate protocols for ceremonial/religious components</li><li>• include marketing activity requirements, e.g., contest winners, competitions, announcements</li><li>• compile program agenda</li><li>• assign roles to personnel appropriate to their responsibilities and skills</li><li>• allocate resources</li><li>• develop contingency plan for program components</li><li>• create required documents, including:<ul style="list-style-type: none"><li>- script, if required</li><li>- detailed agenda</li><li>- production schedule</li></ul></li></ul>
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**SKILL 17 Engage Speakers and Performers**

 2 Years

 Occasionally

**Common Knowledge:**

- Applicable legislation, e.g., labor, copyright/intellectual property rights
- Meeting goals and objectives
- Adult learning principles
- Organizational structure, policies and procedures
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
17.01	Determine meeting or event requirements for speakers and performers	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• times, locations or activities that require speakers and performers</li> <li>• requirements for performers</li> <li>• types of speakers and performers, e.g., musicians, presenters</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine types of speakers or performers to meet goals and objectives of meeting or event</li> <li>• source speakers and performers, e.g., use speaker bureaus, agents, directories</li> </ul>
17.02	Develop selection criteria	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• audience demographics</li> <li>• type of program required</li> <li>• proposed time, duration and location</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• seek input on selection criteria</li> <li>• document selection criteria, for example:                             <ul style="list-style-type: none"> <li>- type of performer or speaker required</li> <li>- duration and location of performance or program</li> <li>- compensation and/or benefits</li> <li>- hours of work or time commitment required</li> </ul> </li> <li>• use selection criteria to choose suitable performers and speakers</li> </ul>
17.03	Select candidates	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• selection criteria</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• prepare for selection, including:                             <ul style="list-style-type: none"> <li>- questions and selection criteria</li> <li>- selection committee</li> <li>- supply speaker(s) and performer(s) selection criteria</li> </ul> </li> <li>• review key information, e.g., overview of requirements</li> <li>• observe candidates' performance, e.g., live selection or recorded</li> <li>• record comments and ratings based on selection criteria</li> <li>• select best performer or speaker</li> </ul>
17.04	Secure contracts and communicate expectations	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• principles of negotiation</li> <li>• components of legal contracts</li> <li>• meeting or event requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• negotiate contracts</li> </ul>

- **monitor to ensure obligations are fulfilled**
- **communicate regularly with speaker(s) and performer(s), including:**
  - expectations of both parties
  - attendee expectations
  - goals of meeting
  - logistics
  - attendee profile
  - performance limitations, e.g., dress code, cultural information
- **integrate contractual obligations into meeting or event's critical path**
- **follow up on issues:**
  - agree on action to rectify non-compliance
  - deal with breaches of contract within acceptable time frame
- **evaluate contractors' performances to identify strengths and weaknesses**

**SKILL 18** Coordinate Food and Beverage Services

 3 Years

 Routinely/regularly

**Common Knowledge:**

- Meeting or event profile, features, budget and theme
- Target market(s)
- Applicable legislation, e.g., liquor laws, public health, food safety, responsible beverage service
- Meeting or event plans, e.g., critical path


Subskills		Knowledge and Abilities
18.01	Determine food and beverage service requirements	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• operational constraints due to venue, site or climatic conditions</li> <li>• dietary needs or concerns</li> <li>• principles and legal requirements of food safety</li> <li>• attendee profile</li> <li>• program schedule</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify considerations, for example:                             <ul style="list-style-type: none"> <li>- theme</li> <li>- sponsors</li> <li>- licensing requirements</li> <li>- attendee profile</li> <li>- trends</li> </ul> </li> <li>• develop guidelines for, for example:                             <ul style="list-style-type: none"> <li>- acquiring products and services, e.g., tendering, direct purchase</li> <li>- establishing controls, e.g., quality, security</li> <li>- methods of distribution, e.g., paid or complimentary</li> </ul> </li> <li>• comply with legislation, e.g., liquor, public health</li> <li>• confirm date, time and location of food and beverage services</li> <li>• perform quantity calculations</li> <li>• determine supplies and equipment required, e.g., dishes, cutlery, glasses, tables, table linens, ice, tickets</li> <li>• arrange for:                             <ul style="list-style-type: none"> <li>- equipment to be set up and operational</li> <li>- supplies to be delivered and available</li> <li>- delivery, storage, returns and recycling of bottles</li> <li>- security for cash, alcohol and tickets</li> <li>- staff training in responsible beverage service</li> </ul> </li> <li>• schedule staff:                             <ul style="list-style-type: none"> <li>- determine number of staff required</li> <li>- identify tasks to be completed</li> </ul> </li> <li>• post schedule</li> </ul>
18.02	Select menu(s)	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• attendee profile</li> <li>• current food and beverage trends</li> <li>• event history, e.g., past selections</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine requirements for meal services:                             <ul style="list-style-type: none"> <li>- menu</li> <li>- arrangements to meet dietary needs or concerns</li> </ul> </li> </ul>

		<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• number of people             <ul style="list-style-type: none"> <li>- cancellation policy</li> <li>- margin for adjustment, e.g., 10%</li> <li>- minimum guarantee</li> </ul> </li> <li>• identify requirements for refreshment and beverage services:             <ul style="list-style-type: none"> <li>- supplies, e.g., alcohol, mixes, condiments, glassware, ice</li> <li>- type of bar service, e.g., cash or host</li> </ul> </li> <li>• address storage, e.g., refrigeration, space requirements</li> <li>• set menus:             <ul style="list-style-type: none"> <li>- consult with key stakeholders or sponsor</li> <li>- incorporate nutritional requirements</li> <li>- accommodate dietary restrictions</li> <li>- address cost considerations</li> </ul> </li> <li>• ensure that serving staff are knowledgeable about menu and ingredients</li> </ul>
18.03	Plan service style(s)	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• types of service styles</li> <li>• principles and practices of food safety</li> <li>• program schedule</li> <li>• attendee profile</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine appropriate service style(s) for meeting or event, e.g., table service, cocktail service, buffet, concessions</li> <li>• identify possible room set-ups:             <ul style="list-style-type: none"> <li>- check layout and amenities, e.g., electrical, water, service and storage areas</li> </ul> </li> <li>• select service style(s) for meeting or event</li> <li>• develop service style plan, for example:             <ul style="list-style-type: none"> <li>- timing</li> <li>- staffing</li> <li>- equipment</li> </ul> </li> <li>• confirm arrangements with suppliers</li> </ul>
18.04	Select food and beverage provider(s)	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• qualified food and beverage providers</li> <li>• on-site and off-site food and beverage capabilities</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• conduct research for best value/price</li> <li>• source food and beverage suppliers</li> <li>• select food and beverage provider(s)</li> <li>• sign and date service contracts</li> <li>• maintain communication as meeting or event approaches</li> </ul>
18.05	Manage alcohol service	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• training programs</li> <li>• applicable legislation, e.g., legal drinking age</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• address liabilities and insurance requirements</li> <li>• identify type of alcohol service, e.g., cash bar, host bar</li> <li>• ensure that staff are trained in responsible beverage service</li> <li>• monitor alcohol service</li> <li>• comply with applicable legislation</li> </ul>



**SKILL 19** Design Environment

 5 Years

 Per project

**Common Knowledge:**

- Meeting or event theme and branding
- Target market(s)
- Meeting or event plans, e.g., critical path
- Applicable legislation, e.g., special effects, capacity


Subskills		Knowledge and Abilities
19.01	Establish functional requirements	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• design concepts of meetings or events, e.g., learning formats, ergonomics</li> <li>• current trends</li> <li>• requirements for attendees with special needs</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• enhance attractiveness and functionality of meeting or event</li> <li>• incorporate movement, methodology and message into design concept</li> <li>• design an environment that:                             <ul style="list-style-type: none"> <li>- enhances performance</li> <li>- encourages desired behavior and learning</li> <li>- fulfils stakeholder contract obligations, e.g., meets organization’s brand requirements</li> </ul> </li> <li>• integrate theme, branding and ambience into meeting or event environment</li> <li>• determine needs, e.g., registration area, meeting rooms, exposition, storage</li> <li>• comply with legislation, e.g., balloon releases, fireworks, lasers, capacity</li> </ul>
19.02	Select décor and furnishings	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of décor elements for functional and experiential contexts</li> <li>• props, scenery, decorations</li> <li>• design trends</li> <li>• theme, budget and objectives of meeting or event</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review theme, budget and objectives of meeting or event</li> <li>• identify assets and limitations of site</li> <li>• determine desired atmosphere for meeting or event</li> <li>• design elements of décor plan:                             <ul style="list-style-type: none"> <li>- include meeting or event theme and images</li> <li>- incorporate signage obligations, e.g., as defined in contract requirements</li> <li>- incorporate audiovisual or technical elements as appropriate</li> <li>- comply with legislation, e.g., fire-retardant materials</li> </ul> </li> <li>• submit draft plan for approval as necessary, e.g., board of directors, clients</li> <li>• communicate plan to appropriate parties, e.g., site manager, meeting or event coordinator</li> <li>• source décor and furnishing suppliers</li> <li>• secure selected décor and furnishings</li> </ul>
19.03	Coordinate meeting or event signage	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of effective signage</li> <li>• types of signage, e.g., digital, human, printed</li> <li>• people and vehicular traffic patterns and traffic flow design</li> </ul>

**Ability to:**

- identify signage requirements for meeting or event, e.g., language
- develop signage that provides information and identification
- select signage that enhances desired and/or required traffic flow
- source and select appropriate suppliers
- coordinate installation and placement of signage at meeting or event

**SKILL 20** Manage Technical Production

 5 Years

 Per project

**Common Knowledge:**

- Product and service terminology, features and options and current technology in key areas of staging, e.g., lighting
- Applicable legislation, e.g., permits, occupational health and safety
- Risk management, e.g., safety considerations
- Problem solving and decision making
- Meeting or event plans, e.g., critical path
- Meeting goals and objectives
- Labor agreements
- Communication order of command

Subskills		Knowledge and Abilities
20.01	Determine requirements for staging and technical equipment	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• installation and operation of production elements</li> <li>• physical constraints of site</li> <li>• program objectives</li> <li>• audio-visual fundamentals</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review program elements</li> <li>• determine staging needs, e.g., size, height, surface, capacity</li> <li>• identify equipment needs, e.g., lighting, sound, audiovisual, infrastructure, safety equipment, special effects</li> <li>• secure permits or approvals for staging and equipment</li> <li>• specify spatial needs, temporal and infrastructure requirements and restrictions</li> </ul>
20.02	Acquire staging and technical equipment	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event staging and technical equipment specifications</li> <li>• qualified suppliers and contractors</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• develop specifications:                             <ul style="list-style-type: none"> <li>- detail precise requirements for staging and equipment to be acquired</li> <li>- use proper product and service terminology</li> </ul> </li> <li>• source suppliers and contractors:                             <ul style="list-style-type: none"> <li>- obtain quotes as necessary</li> <li>- negotiate and obtain staging and equipment</li> </ul> </li> </ul>
20.03	Install staging and technical equipment	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• installation of staging and equipment</li> <li>• mechanics of production installation</li> <li>• skilled personnel for installation</li> <li>• hiring process for installation specialists</li> <li>• contingency plans</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• coordinate logistics of installing staging and equipment within meeting or event site, e.g., timing of arrival and delivery, placement</li> <li>• address safety issues or concerns, e.g., electrical cords</li> <li>• ensure availability of installation equipment, machinery, tools and other assistive devices</li> <li>• hire skilled installation professionals as required, e.g., stagehands, riggers, electricians</li> <li>• monitor installation to identify necessary adjustments</li> </ul>

		<ul style="list-style-type: none"> <li>• tour stage area with appropriate person (e.g., technician, stage manager) to ensure that requirements have been met for:             <ul style="list-style-type: none"> <li>- stage</li> <li>- lighting and audiovisual</li> <li>- special effects</li> <li>- stage security and safety</li> <li>- storage areas</li> </ul> </li> <li>• make arrangements to address concerns</li> </ul>
20.04	Oversee technical production operation	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• stage management, including typical problems and resolutions</li> <li>• team leading and delegating</li> <li>• safety and integrity of staging and equipment, e.g., power and floor loads</li> <li>• location from which technicians will operate, e.g., booth, table, area, trailer</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• liaise with technical director and equipment operators as needed</li> <li>• communicate roles, responsibilities, restrictions and timelines with technical personnel</li> <li>• provide sufficient time and access for performer and technical rehearsals and equipment checks:             <ul style="list-style-type: none"> <li>- evaluate all elements of program, e.g., program content, entertainers, sound, special effects</li> <li>- adjust timing and sequencing if necessary</li> </ul> </li> <li>• monitor technical issues during meeting or event</li> <li>• manage disruption to performance or program, where necessary</li> </ul>

**SKILL 21** Develop Plan for Managing Movement of Attendees

 3 Years

 Routinely/regularly

     4

**Common Knowledge:**

- Meeting or event profile, features and budget
- Applicable legislation
- Meeting or event plans, e.g., critical path
- Attendee/participant needs

Subskills		Knowledge and Abilities
21.01	Develop admittance credential systems	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• admission and access control methods</li> <li>• registration methods, e.g., ticketing systems</li> <li>• admission support systems, e.g., crowd control, ushers, signage</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• analyze needs and requirements, e.g., capacity, criteria of access, restrictions</li> <li>• select admittance systems to be used, e.g., registration procedures, tickets, name tags, photo identification, wristbands</li> <li>• select technology to support admission systems</li> <li>• consult with specialists (e.g., local police, security company) as required</li> <li>• draft plan for admittance, including:                             <ul style="list-style-type: none"> <li>- criteria</li> <li>- levels, e.g., general admission, VIPs</li> <li>- methods</li> <li>- security</li> <li>- requirements for other on-site admission</li> <li>- communication policy</li> <li>- special needs of attendees</li> </ul> </li> </ul>
21.02	Select crowd management techniques	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• communication plan</li> <li>• access control methods</li> <li>• local regulations</li> <li>• traffic flow, circulation and congregation management</li> <li>• queue management</li> <li>• sources of specialist assistance in relation to crowd control, e.g., security companies, police</li> <li>• technology and equipment used in crowd management</li> <li>• specific risk management issues associated with crowds</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• develop crowd management strategies for:                             <ul style="list-style-type: none"> <li>- traffic flow, e.g., circulation, congregation</li> <li>- conditions exceeding thresholds, e.g., regulatory capacity levels</li> <li>- attendee behavior and restrictions</li> </ul> </li> <li>• determine appropriate entry and exit locations, considering:                             <ul style="list-style-type: none"> <li>- admittance credentials</li> <li>- seating systems</li> <li>- safety</li> <li>- traffic flow</li> </ul> </li> <li>• establish queue management if necessary</li> <li>• ensure that space, facilities and services are adequate for attendees</li> </ul>

		<ul style="list-style-type: none"> <li>• verify that appropriate signage is used</li> <li>• communicate policies and expectations regarding attendee behavior and restrictions</li> <li>• use systems and personnel to manage and monitor crowd conditions and behavior:             <ul style="list-style-type: none"> <li>- have systems in place to respond to situations that exceed pre-established thresholds</li> </ul> </li> <li>• obtain services and equipment, for example:             <ul style="list-style-type: none"> <li>- ushers</li> <li>- security</li> <li>- signs</li> <li>- barricades</li> </ul> </li> <li>• secure approval of authorities, e.g., fire marshals</li> <li>• make sure specific risk management issues associated with crowds are in place</li> </ul>
<p>21.03</p>	<p>Coordinate accommodations and transportation</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• types of accommodations and transportation available</li> <li>• reservation procedures and policies</li> <li>• cancellation policies</li> <li>• deposit requirements</li> <li>• payment procedures</li> <li>• room blocks and rates</li> <li>• corporate travel policies</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• coordinate accommodations:             <ul style="list-style-type: none"> <li>- inform participants of reservation process and responsibility, e.g., housing bureau, self-booking</li> <li>- monitor room bookings and rooming lists if necessary</li> </ul> </li> <li>• organize transportation:             <ul style="list-style-type: none"> <li>- analyze needs and options, e.g., airlines, taxis, charter buses</li> <li>- negotiate and contract suppliers</li> <li>- inform participants of reservation process and responsibility, e.g., deadlines, rates, self-booking</li> </ul> </li> </ul>
<p>21.04</p>	<p>Manage protocol requirements</p>	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• precedence</li> <li>• titles</li> <li>• styles of address</li> <li>• honor and salutes</li> <li>• flags</li> <li>• religious, cultural and ritual requirements</li> <li>• meeting or event logistics</li> <li>• regulatory issues, e.g., immigration, traffic laws</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine protocol requirements for:             <ul style="list-style-type: none"> <li>- invitations</li> <li>- reception room</li> <li>- seating arrangements</li> <li>- introductions</li> <li>- transportation</li> <li>- accommodations</li> <li>- security</li> </ul> </li> <li>• secure appropriate personnel, e.g., to conduct ceremonies, to accompany VIPs</li> <li>• arrange for ceremonial equipment, e.g., flags</li> <li>• coordinate logistical requirements, e.g., to arrange food and beverage or transportation needs of VIPs</li> </ul>

**SKILL 22** Select Site

 3 Years

 Routinely/regularly

  5


**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features and budget
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
22.01	Determine site specifications	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• target market(s)</li> <li>• type of venues</li> <li>• accessibility needs of special populations, e.g., VIPs, individuals operating motorized vehicles</li> <li>• purpose of event or meeting</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review nature, scope, complexity and fiscal requirements of meeting or event, e.g., budget, profile and image, facilities licensing, season, anticipated attendance, flexibility, accessibility (including for those with disabilities), security needs</li> <li>• determine desired or required geographic location and type of facility for meeting or event</li> <li>• define spatial needs, proximity, and housing patterns and accessibility requirements for site</li> <li>• identify dates and durations of site occupancy</li> <li>• develop site selection criteria</li> </ul>
22.02	Identify and inspect sites	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• selection criteria</li> <li>• site infrastructure</li> <li>• risk management factors</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• research potential sites, e.g., review sites of similar types and scopes of meeting or events</li> <li>• conduct site inspection:                             <ul style="list-style-type: none"> <li>- investigate and evaluate site, e.g., use site checklist</li> <li>- verify viability of facilities and services</li> <li>- determine availability of services</li> </ul> </li> <li>• prioritize selection criteria</li> <li>• evaluate possible sites, for example:                             <ul style="list-style-type: none"> <li>- evaluate location based on proximity to hotels, availability of parking in area, and accessibility, e.g., public transportation, air lift</li> <li>- rate sites based on dates, rates, space, guest rooms and other capabilities or constraints</li> </ul> </li> <li>• determine best site and communicate information to colleagues and key stakeholders to secure approval</li> <li>• reserve and confirm site, e.g., negotiate and contract facility, outline responsibilities</li> <li>• maintain and develop effective working relationship with venue personnel</li> </ul>

**SKILL 23** Design Site Layout

 3 Years

 Per Project

**Common Knowledge:**

(No common knowledge identified for this skill)

	Subskills	Knowledge and Abilities
23.01	Design site layout	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• adult learning principles</li> <li>• meeting or event profile, features, budget and program</li> <li>• meeting or event concept and theme</li> <li>• site infrastructure and capacity</li> <li>• budgetary implications</li> <li>• applicable legislation, e.g., access, fire codes</li> <li>• site design and site planning, e.g., access points, location of emergency exits</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine needs, for example:                             <ul style="list-style-type: none"> <li>- space</li> <li>- structures—fixed and temporary</li> <li>- adult learning needs</li> <li>- utilities, e.g., power, water, sewage, gas</li> <li>- parking</li> <li>- communications</li> <li>- areas for first aid and lost children</li> <li>- emergency access</li> <li>- bylaw requirements, e.g., fire regulations</li> <li>- signage</li> <li>- translation or interpretation needs</li> </ul> </li> <li>• confirm location of structures and facilities within site</li> <li>• draft site plan, recognizing:                             <ul style="list-style-type: none"> <li>- structures—existing permanent and temporary</li> <li>- facilities</li> <li>- services</li> <li>- exhibit space</li> <li>- meeting or event program</li> <li>- attractions</li> <li>- human and vehicular traffic flow</li> <li>- environmental implications</li> <li>- best use of resources</li> <li>- security</li> </ul> </li> <li>• establish space assignments and set-up configurations:                             <ul style="list-style-type: none"> <li>- obtain expert advice on configuration when needed</li> <li>- build in flexibility to allow for adjustments</li> <li>- detail placement and configuration, e.g., orientation of temporary structure openings</li> </ul> </li> <li>• inspect site and review site plan, for example:                             <ul style="list-style-type: none"> <li>- accessibility</li> <li>- washrooms</li> <li>- obstructions</li> <li>- capacity limits</li> <li>- loading dock or loading entrance</li> <li>- special needs parking</li> </ul> </li> </ul>




- vehicle road access
- utilities

- prepare accurate scale diagrams as required
- inform organization/stakeholders/clients when changes are necessary, e.g., when a planned temporary structure cannot be installed
- adjust site plan as required
- obtain support of key stakeholders for planned layout

**SKILL 24** Manage Meeting or Event Site

 6 Years

 Routinely/regularly

**Common Knowledge:**


- Meeting or event profile, features and budget
- Applicable legislation, e.g., occupancy, fire codes, occupational health and safety
- Roles and responsibilities of individuals
- Problem solving and decision making
- Team leading and delegating
- Health, safety and security considerations
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
24.01	Create logistics action plan for site set-up and take-down	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• timing and sequencing</li> <li>• human resources</li> <li>• existing physical resources</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• confirm access to site, e.g., specific date(s) and time(s)</li> <li>• prepare detailed production schedule, including:                             <ul style="list-style-type: none"> <li>- floor plans</li> <li>- timing</li> <li>- room set-ups</li> <li>- personnel required</li> <li>- roles and responsibilities</li> </ul> </li> <li>• make arrangements for shipping/receiving and storage</li> <li>• ensure that human resources are available for set-up and take-down</li> <li>• define and implement site move-out requirements and restoration including key contact points</li> <li>• communicate plan to appropriate individuals</li> <li>• integrate plan with other aspects of meeting or event</li> </ul>
24.02	Set up site	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• site set-up and take-down action plan</li> <li>• contractual obligations with suppliers</li> <li>• delivery schedules</li> <li>• health, safety, security and environmental considerations</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• confirm access to site</li> <li>• communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers</li> <li>• ensure personnel are familiar with equipment being used</li> <li>• follow up to ensure progress according to production schedule, for example:                             <ul style="list-style-type: none"> <li>- arrival of services, deliveries and equipment</li> <li>- arrival of related groups</li> <li>- technical rehearsal time and performer/participant orientation</li> <li>- special facilities, e.g., dressing rooms, guest rooms/lounges, equipment rooms, staff office</li> </ul> </li> <li>• ensure equipment is checked and operational</li> <li>• coordinate inbound receiving</li> <li>• determine inbound inventory</li> <li>• liaise with facility management and site-specific personnel as appropriate</li> </ul>

		<ul style="list-style-type: none"> <li>• coordinate with appropriate colleagues and outside service people, e.g., refer issues outside area of responsibility to appropriate personnel</li> <li>• adapt plan to changing circumstances as necessary:</li> <li>- brief all personnel involved</li> </ul>
24.03	Monitor site during meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• typical systems, procedures and logistics for on-site management</li> <li>• techniques for managing stress and time during operation of meeting or event</li> <li>• contractual obligations</li> <li>• risk management</li> <li>• contingency plans</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• monitor meeting or event operation through observation and appropriate communication and control mechanisms</li> <li>• identify and analyze operational problems or need for additional services as issues arise</li> <li>• implement solutions to problems immediately</li> <li>• liaise with appropriate parties (e.g., clients) throughout meeting or event to ensure it is progressing to their satisfaction</li> <li>• monitor and ensure effective delivery of services through ongoing liaison with contractors</li> <li>• monitor and manage room block (e.g., VIPs, amenities, attrition, overbooking, dishonored reservations, etc.)</li> </ul>
24.04	Take down site	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• site set-up and take-down action plans</li> <li>• contractual obligations</li> <li>• environmental considerations</li> <li>• health, safety, security and environmental considerations</li> <li>• time allotted for take-down</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers</li> <li>• coordinate withdrawal of services and equipment, e.g., arrange for utilities to be disconnected</li> <li>• allow enough time for take-down</li> <li>• coordinate human resources</li> <li>• arrange for specialized equipment if required</li> <li>• clean, count, and pack equipment:             <ul style="list-style-type: none"> <li>- check for missing and/or damaged items</li> <li>- return rented equipment</li> <li>- repair and store equipment</li> </ul> </li> <li>• liaise with appropriate colleagues and outside service people</li> <li>• return site to condition specified in contract/agreement, for example:             <ul style="list-style-type: none"> <li>- ensure equipment is checked and operational</li> <li>- confirm suppliers have removed their items from site</li> <li>- remove hazards caused by installation of temporary structures</li> <li>- remove waste and decorations: consider recycling options</li> </ul> </li> <li>• conduct site inspection with facility representative to ensure that site clean-up is satisfactory</li> <li>• debrief personnel and identify relevant points for meeting or event evaluation</li> <li>• complete all relevant documents and records according to organization's procedures</li> <li>• establish outbound inventory counts, e.g., supplies, computers</li> <li>• coordinate shipping</li> </ul>

**SKILL 25** Manage On-Site Communications

 3 Years

 Per project

  5

**Common Knowledge:**

- Communication technology and terminology
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
25.01	Establish communications framework	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of communications framework</li> <li>• effective communication skills</li> <li>• communication protocols</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define communication needs of meeting or event, e.g., individuals, meeting or event features</li> <li>• identify types of messages to be communicated to internal and external public and personnel, e.g., announcements, updates, results, changes:                             <ul style="list-style-type: none"> <li>- outline content and style of messages to be communicated including terminology and language</li> </ul> </li> <li>• create a flowchart of communication responsibilities that:                             <ul style="list-style-type: none"> <li>- outlines distribution structure</li> <li>- identifies decision-making hierarchy</li> </ul> </li> <li>• develop communication resources, for example:                             <ul style="list-style-type: none"> <li>- verification documentation, e.g., specifications guidebook, production book</li> <li>- contact lists, e.g., attendees, staff, suppliers, emergency services</li> </ul> </li> <li>• set up communication channels that facilitate flow and scope of communication needs</li> </ul>
25.02	Determine and acquire required communication equipment and resources	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• communication equipment and resources</li> <li>• budget</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• analyze needs, considering:                             <ul style="list-style-type: none"> <li>- type and size of venue</li> <li>- users, e.g., staff and volunteers, emergency personnel</li> </ul> </li> <li>• develop guidelines for:                             <ul style="list-style-type: none"> <li>- issuing and maintaining equipment</li> <li>- users, e.g., frequencies, usage</li> </ul> </li> <li>• determine technology appropriate for communication needs</li> <li>• obtain equipment and services, for example:                             <ul style="list-style-type: none"> <li>- cellular telephones</li> <li>- two-way radios</li> <li>- pagers</li> <li>- PA system</li> <li>- web-based</li> </ul> </li> <li>• integrate technology from all parts of meeting or event into communication plan, e.g., technical production, signage</li> </ul>

25.03	Specify communication procedures and protocols	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• communication equipment protocols</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• specify techniques for internal and external communications, e.g., written, audio, visual and electronic</li><li>• identify types of messages to be communicated</li><li>• coordinate briefing and debriefing meetings</li><li>• establish communication protocols, e.g., radio discipline</li><li>• create a plan and team for crisis or emergency situations, e.g., equipment failure</li><li>• ensure that on-site communication is available in a timely manner</li><li>• train staff in:<ul style="list-style-type: none"><li>- use of equipment</li><li>- locations of services</li><li>- protocol, e.g., what is appropriate to relay by radio</li></ul></li><li>• monitor communication systems on-site:<ul style="list-style-type: none"><li>- distribute and retrieve equipment</li><li>- ensure that protocol is followed</li></ul></li></ul>
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**SKILL 26** Manage Marketing Plan

 7 Years

 Routinely/Regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event profile, features and budget
- Target market(s)
- Meeting or event plans, e.g., critical path

Subskills		Knowledge and Abilities
26.01	Conduct situational analysis	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• sources of market information—current and historical</li> <li>• data collection and analyzing techniques</li> <li>• marketing concepts, such as ‘marketing mix’</li> <li>• mission statement, goals and objectives</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• review historical data, e.g., surveys, evaluations, budget</li> <li>• evaluate meeting or event features, e.g., location, service, merchandise, resources, promotion, price, image</li> <li>• determine strengths, weaknesses, opportunities and threats to meeting or event and/or organization</li> <li>• assess target market(s)</li> <li>• define attendee/participant current and future needs and expectations</li> <li>• consider competition, e.g., evaluate strengths and weaknesses</li> <li>• research economic, political and social conditions</li> <li>• analyze community infrastructure and resources</li> <li>• note new marketing techniques and mediums available</li> <li>• identify opportunities to expand into new markets and innovations to better meet attendee/participant needs</li> <li>• discern legal and regulatory restrictions that may impact meeting or event</li> <li>• summarize results of situational analysis:                             <ul style="list-style-type: none"> <li>- make recommendations and conclusions considering budget</li> </ul> </li> </ul>
26.02	Define target market segments	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• target market analysis, e.g., demographic and psychographic research</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• develop profiles of potential meeting or event attendees/participants including, for example:                             <ul style="list-style-type: none"> <li>- demographics</li> <li>- psychographics</li> </ul> </li> <li>• match target segment profile to features, products and services</li> <li>• define geographic reach of meeting or event</li> </ul>

26.03	Develop branding for meeting or event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event concept/theme</li> <li>• target markets</li> <li>• products and services</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify unique value for target market</li> <li>• position meeting or event amidst other meeting or events</li> <li>• identify marketing message for each target market</li> <li>• develop logo and other visual and verbal identifiers: <ul style="list-style-type: none"> <li>- engage expertise, if required</li> </ul> </li> <li>• ensure consistency with brand and message with mission statement, goals and objectives</li> </ul>
26.04	Select marketing distribution channels	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• available marketing distribution channels, e.g., advertising, publicity, direct marketing, cross-promotions/partnerships, Internet (e-commerce, web marketing, online registration)</li> <li>• strengths and weaknesses of different types of mediums</li> <li>• meeting or event messages and branding</li> <li>• how to generate preferences for types of mediums</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• analyze available distribution channels(s) for market penetration</li> <li>• match messages to target market(s) using best approach</li> <li>• select most effective distribution channels that provide best return on investment</li> </ul>
26.05	Develop integrated marketing strategy	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• situational analysis data</li> <li>• target market segment analysis</li> <li>• stakeholder needs and expectations, e.g., stakeholder package requirements</li> <li>• message and brand of meeting or event</li> <li>• selected marketing mediums</li> <li>• legal, regulatory and ethical requirements affecting marketing of meeting or event products and services</li> <li>• media contact</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• design meeting or event marketing strategy that will complement or integrate with organization's marketing strategy</li> <li>• create schedule of marketing activities to build up to and/or during meeting or event</li> <li>• integrate activities to build on and reinforce each other</li> <li>• maintain consistency of marketing activities</li> <li>• determine budget allocations, staff responsibilities and milestones in conjunction with meeting or event critical path</li> <li>• identify resource requirements to implement plan</li> <li>• forecast demand based on situational analysis</li> <li>• define marketing goals and objectives for products and services</li> <li>• prioritize segments in relation to products and services</li> <li>• develop measurement methods and key performance indicators to monitor effectiveness of plan</li> <li>• establish information collection, record-keeping and reporting requirements</li> <li>• correlate marketing data to business goals</li> </ul>

26.06	Implement marketing plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• available marketing mediums</li><li>• strengths and weaknesses of different types of mediums</li><li>• target market preferences</li><li>• negotiation techniques</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• communicate goals and objectives of plan—and any changes—to marketing staff</li><li>• determine critical dates</li><li>• coordinate activities with other aspects of meeting or event production</li><li>• monitor activities and results on ongoing basis:<ul style="list-style-type: none"><li>- ensure that goals and objectives are being met</li><li>- maintain records of activities, e.g., costs, results</li></ul></li></ul>
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## SKILL 27 Manage Marketing Materials

 3 Years

 Routinely/Regularly

    3

### Common Knowledge:

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event budget, e.g., allocations
- Meeting or event plans, e.g., critical path
- Target market segments

Subskills		Knowledge and Abilities
27.01	Determine needed marketing materials for event	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• available marketing distribution channels, e.g., print/imprint, electronic, social networking sites</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine marketing collateral needed for marketing and meeting or event activities, e.g., brochures, programs, tickets</li> <li>• analyze media available to meet requirements, e.g., print, electronic</li> <li>• identify marketing message for each target market segment</li> <li>• select suitable and cost-effective medium for each type of meeting or event material to be produced</li> </ul>
27.02	Develop content and design parameters	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event features, theme/concept, branding and message</li> <li>• meeting or event details, e.g., date, time, location</li> <li>• materials to be produced</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine style of marketing collateral, e.g., design, format</li> <li>• use appropriate language and formats for respective audiences</li> <li>• incorporate branding message, e.g., logos, slogans, positioning statements</li> <li>• prepare content of text</li> <li>• approve/prepare layout for printing and production</li> <li>• monitor consistency of meeting or event theme/concept, branding and message</li> <li>• secure permission to use intellectual property as necessary, e.g., seek 'approval for printing' waivers</li> <li>• obtain permission to use copyrighted and licensed materials, if required</li> </ul>
27.03	Produce marketing materials	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• procurement plan and processes</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define specifications for each item</li> <li>• source and solicit suitable providers</li> <li>• determine delivery deadlines</li> <li>• monitor quality and accuracy of text and match to specifications</li> <li>• understand potential impact of geographic location of provider, e.g., customs, shipping</li> </ul>

27.04	Distribute marketing materials	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• contact distribution lists</li><li>• contact personnel for internal and external operations</li><li>• promotional activities schedule</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• determine delivery method for each item produced, e.g., coordinate delivery logistics</li><li>• develop distribution schedule</li><li>• organize and assemble materials for distribution</li><li>• comply with information management plan for archiving printed/imprinted materials</li></ul>
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**SKILL 28** Manage Meeting or Event Merchandise

 2 Years

 Occasionally

  2

**Common Knowledge:**


- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event plans, e.g., critical path
- Target market segments

Subskills		Knowledge and Abilities
28.01	Develop product(s) design and specifications	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event theme/concept, branding and message(s)</li> <li>• historical data on past merchandise</li> <li>• brand guidelines</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• leverage post-meeting or event merchandising sales opportunities</li> <li>• review historical data, e.g., types of merchandise, how and where sold, price points</li> <li>• research customer needs and interests</li> <li>• assess need to modify or discontinue existing merchandise:                             <ul style="list-style-type: none"> <li>- identify new or replacement merchandise</li> </ul> </li> <li>• evaluate competition, e.g., other similar products, price points, merchandising venues</li> <li>• determine potential liabilities and legalities associated with merchandise</li> <li>• define product design and production specifications</li> <li>• note new marketing techniques and mediums available</li> <li>• identify other/new market opportunities</li> <li>• integrate product concepts with other marketing activities, e.g., advertising poster upgraded to merchandise quality poster</li> </ul>
28.02	Determine pricing	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• marketing objectives</li> <li>• historical data on price points of previous merchandise</li> <li>• financial goals</li> <li>• market conditions</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• calculate direct and indirect costs</li> <li>• determine profit requirements</li> <li>• research pricing of similar merchandise:                             <ul style="list-style-type: none"> <li>- assess competition</li> <li>- review historical data</li> </ul> </li> <li>• set prices for each type of merchandise considering:                             <ul style="list-style-type: none"> <li>- price points for target market segments</li> <li>- merchandise quality</li> <li>- perceived value</li> <li>- opportunity for sales, e.g., one time only during meeting or event, after meeting or event</li> </ul> </li> </ul>

28.03	Control brand integrity	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• meeting or event brand and messaging</li> <li>• legal rights</li> <li>• brand guidelines</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• assess potential of licensing</li> <li>• negotiate licensing controls and concessions: <ul style="list-style-type: none"> <li>- develop contract</li> </ul> </li> <li>• establish specifications for commemorative or legacy products</li> <li>• protect brand integrity: <ul style="list-style-type: none"> <li>- establish means to differentiate between real product and replicas</li> <li>- control release/launch of products</li> </ul> </li> <li>• monitor internal and external merchandise sales</li> <li>• implement fraud deterrents</li> </ul>
28.04	Produce merchandise	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• procurement plan and process</li> <li>• budget allocation</li> <li>• merchandise specifications</li> <li>• launch dates for merchandise</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• source suitable merchandise manufacturers</li> <li>• negotiate purchase agreements</li> <li>• determine quantities of merchandise</li> <li>• define import and export requirements</li> <li>• monitor quality</li> </ul>
28.05	Distribute merchandise	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• launch dates for merchandise</li> <li>• procurement plan and process</li> <li>• point of sale restrictions, e.g., selling products on display floor</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine physical outlets</li> <li>• specify online sales outlets</li> <li>• negotiate distribution agreements</li> <li>• establish inventory management systems</li> <li>• define shipping arrangements and associated shipping costs</li> <li>• coordinate distribution of suitable point of purchase and other sales displays</li> <li>• identify payment methods</li> </ul>
28.06	Coordinate hospitality	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• local meetings or events and attractions</li> <li>• hospitality protocol</li> <li>• target market(s)</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine hospitality requirements</li> <li>• organize hospitality services and facilities, for example: <ul style="list-style-type: none"> <li>- designate reception areas</li> <li>- book tickets for local meetings or events and attractions</li> <li>- arrange for transportation</li> <li>- arrange food and beverage services</li> <li>- arrange for information on local meetings or events/attractions</li> </ul> </li> <li>• make arrangements for hospitality services</li> </ul>

## SKILL 29 Promote Meeting or Event

 5 Years

 Per project

### Common Knowledge:


- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event plans, e.g., critical path
- Target market segments
- Meeting or event concept/theme

Subskills		Knowledge and Abilities
29.01	Develop advertising plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• budget allocation</li> <li>• evaluation plan and processes</li> <li>• potential markets</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine advertising needs of internal and external operations</li> <li>• evaluate strengths and weaknesses of available media outlets and techniques</li> <li>• identify suitable media outlets</li> <li>• negotiate and purchase media goods and services</li> <li>• verify delivery and evaluate performance of media buys</li> </ul>
29.02	Develop cross-promotional activities	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• official meeting or event sponsors, suppliers, donors</li> <li>• impact of meeting or event on local community, e.g., economic benefits, social responsibilities</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• assess potential partnership opportunities with sponsors, donors, suppliers and other compatible organizations</li> <li>• evaluate opportunities and costs to promote meeting or event at venues of other non-competing meetings or events with similar target market segments</li> <li>• select mix of activities for promotions, e.g., multi-tiered, cross-promotions</li> <li>• negotiate reciprocal agreements for logo and brand usage: <ul style="list-style-type: none"> <li>- seek approval for use of logo(s) as necessary</li> </ul> </li> <li>• determine resource requirements, e.g., print materials and merchandise</li> <li>• liaise with partners</li> <li>• coordinate launch dates of each promotional activity</li> </ul>
29.03	Develop contests	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• official meeting or event sponsors, suppliers, donors</li> <li>• budget allocation</li> <li>• branding and message of meeting or event</li> <li>• permits or legal requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• determine type of contest(s) to hold</li> <li>• assess liabilities and legalities</li> <li>• establish rules, regulations, selection criteria, entry procedures</li> <li>• define prize system</li> <li>• seek out cross-promotional opportunities with sponsors and suppliers, e.g., media supplier</li> <li>• define resource requirements, e.g., print materials</li> <li>• coordinate presentation logistics</li> </ul>

29.04	Coordinate sales promotions	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• meeting or event features</li><li>• message and brand of meeting or event</li><li>• selected marketing mediums</li><li>• cross-promotional activities</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• determine requirements for each promotional activity</li><li>• assess each activity on its ability to create demand</li><li>• establish strategies to create purchasing urgency</li><li>• develop schedule of promotional activities to build up to meeting or event</li><li>• integrate activities to build on and reinforce each other</li><li>• maintain consistency of promotional activities</li></ul>
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**SKILL 30** Contribute to Public Relations Activities

 5 Years

 Per project

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event features, concept/theme
- Meeting or event plans, e.g., critical path
- Target market segments
- Stakeholders’ needs and expectations
- Communication plan and protocols

Subskills		Knowledge and Abilities
30.01	Contribute to public relations strategy	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• marketing plan and promotional activities</li> <li>• communication plan</li> <li>• public relations strategies</li> <li>• emergency response and risk management plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• define objectives for public relations</li> <li>• identify scope and characteristics of public</li> <li>• determine information needs of each sector of the public</li> <li>• develop proactive and reactive strategies to address meeting or event and organizations’ needs and objectives</li> <li>• generate well-articulated and credible messages to be communicated to sectors of the public</li> </ul>
30.02	Contribute to publicity plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• marketing plan and promotional activities</li> <li>• key internal and external issues affecting meeting or event and/or organization</li> <li>• organization’s key messages</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify legal, regulatory and ethical requirements affecting implementation of public relations strategies</li> <li>• define public relations objectives for meeting or event</li> <li>• source and select suitable media and communication outlets to reach sectors of the public</li> <li>• determine resource requirements, e.g., print materials</li> <li>• integrate public relations activities with advertising and promotions activities as part of overall marketing plan</li> <li>• develop schedule of publicity campaign activities, e.g., media blitz, media announcements</li> <li>• assemble media list with contact information and protocols</li> <li>• specify key performance indicators, e.g., ‘number of hits per target’</li> </ul>
30.03	Develop media relations	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• publicity strategies and plan</li> <li>• selected media and communication outlets</li> <li>• media contacts and protocols</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• prepare timely and newsworthy media releases</li> <li>• respect and accommodate media needs and restrictions</li> <li>• identify spokesperson(s)</li> <li>• provide media with appropriate access and facilities</li> <li>• supply accurate, credible information</li> </ul>

30.04	Contribute to implementation of publicity plan	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• message and brand of meeting or event</li> <li>• impact of meeting or event on local community, e.g., economic benefits, spin-off benefits</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• establish relationships with government, community and stakeholders</li> <li>• identify issues and trends that may impact meeting or event objectives and/or production</li> <li>• determine method to control interaction between meeting or event organization and the public</li> <li>• cultivate positive image and public opinion through promotional activities, advertising campaign and publicity plan</li> <li>• monitor news and stakeholder environments for anything that could affect meeting or event and its production</li> <li>• evaluate effectiveness of public relations activities</li> <li>• adjust plan and activities to address issues and changes to image</li> </ul>
30.05	Manage crises and controversies	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• selected media and communication outlets</li> <li>• media contacts and protocols</li> <li>• emergency response plan</li> <li>• current and emerging social concerns</li> <li>• risk management plan</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• monitor news related to meeting or event and stakeholder environments</li> <li>• recognize potential of incidents to escalate</li> <li>• follow communication protocols</li> <li>• gather facts to verify or dispute claims</li> <li>• integrate control of crises and controversies with public relations activities</li> <li>• maintain consistent, agreed-upon messages in keeping with mission statement, goals and objectives of meeting or event and organization</li> <li>• document findings</li> <li>• access legal counsel</li> </ul>



**SKILL 31** Manage Sales Activities

 7 Years

 Routinely/regularly

  5

**Common Knowledge:**

- Mission statement, goals and objectives of meeting or event and organization
- Meeting or event products, e.g., registration, merchandise, tickets, booth/concession space, accommodations packages
- Target market segments
- Communication plan and protocols
- Site design

Subskills		Knowledge and Abilities
31.01	Develop sales plan and objectives	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• target market segmentation analysis and purchasing behavior</li> <li>• marketing plan</li> <li>• competitors' sales practices</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify legal, regulatory and ethical requirements for sales</li> <li>• specify revenue sources, e.g., registration fees, advertising, products</li> <li>• set sales objectives for all meeting or event products:                             <ul style="list-style-type: none"> <li>- review historical data on previous sales figures</li> <li>- identify previous target market segments</li> </ul> </li> <li>• define potential target market segments</li> <li>• decide on sales tools and tactics to use with each target market segment and product</li> <li>• evaluate sales team abilities to maximize strengths</li> <li>• set up sales organizational structure, e.g., geographically based, customer-based, product-based</li> <li>• integrate sales plan and objectives with business and marketing plan strategies</li> <li>• establish key performance indicators of sales plan</li> <li>• set sales target for sales team</li> <li>• communicate sales plan and sales objectives to sales staff</li> <li>• determine documentation requirements</li> </ul>
31.02	Conduct sales activities	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• sales plan and objectives, tools and tactics, targets</li> <li>• principles of selling, sales communication and relationship-building</li> <li>• procurement plan and process</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• integrate sales tactics with promotional and advertising activities to encourage desired consumer behavior</li> <li>• use sales tools and tactics, e.g., qualify leads, conduct sales calls, deliver sales presentations, package products, provide sales incentives, provide giveaways, use telephone sales, overcome client objections</li> <li>• close sales:                             <ul style="list-style-type: none"> <li>- negotiate sales details, e.g., cost/price, shipping fees</li> <li>- set dates for product delivery, e.g., booth set-up, merchandise delivery</li> </ul> </li> <li>• check for unauthorized on-site or remote sales activities, e.g., scalpers</li> <li>• monitor and evaluate success of sales plan by comparing to key performance indicators and sales targets</li> <li>• make adjustments to sales plan as required by variations in performance and timelines in meeting sales targets</li> <li>• communicate changes to sales plan to key stakeholders and sales staff</li> <li>• identify and correct breaches of legal, regulatory, ethical and social requirements:                             <ul style="list-style-type: none"> <li>- examine causes and take corrective action or re-examine requirements</li> </ul> </li> <li>• monitor sales documentation</li> </ul>

Subskills		Knowledge and Abilities
31.03	Determine sales platforms	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• meeting or event marketing materials</li><li>• promotional activities, e.g., website</li><li>• sponsors and stakeholders</li><li>• distribution options</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• research legal, regulatory, ethical, social responsibility requirements and cost-effectiveness of sales procedures</li><li>• select appropriate sales platforms for target market segments and meeting or event products and services</li><li>• determine resources for sales, e.g., gate set-up, merchandise type and quantities, booths, staff, floats, sales transaction equipment</li><li>• identify online sales tools required, e.g., links to site, site design, secure payment software, ease of use</li><li>• establish resources required and parameters of sale activities of authorized external sales outlets, e.g., quantity of tickets, price structure, promotional materials</li></ul>

**SKILL 32 Exhibit Professional Behavior**

(contextual information not applicable)

**Common Knowledge:**

- Organizational policies and procedures
- Organizational structure

Subskills		Knowledge and Abilities
32.01	Project a professional image	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of presenting a professional image</li> <li>• appropriate protocols</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• maintain professional conduct and appearance</li> <li>• exhibit: <ul style="list-style-type: none"> <li>- approachability</li> <li>- dedication</li> <li>- flexibility</li> <li>- patience</li> </ul> </li> <li>• follow appropriate protocols, e.g., VIP, dress codes</li> </ul>
32.02	Determine leadership	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• own role and responsibilities</li> <li>• own level of authority</li> <li>• personal strengths and limitations</li> <li>• strengths, limitations and potential of staff</li> <li>• different leadership styles</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• act as a role model</li> <li>• delegate responsibly</li> <li>• use leadership style appropriate to situations and people</li> <li>• apply authority appropriately</li> <li>• communicate organization's and meeting or event's vision and values</li> <li>• take initiative</li> <li>• facilitate change</li> <li>• recognize stages in team development and promote teamwork</li> <li>• handle difficulties, challenges and conflict</li> <li>• recognize and encourage creativity and innovation in others</li> <li>• provide support to staff, especially during times of setback and/or change</li> <li>• empower staff within agreed-upon limits</li> </ul>
32.03	Demonstrate ethical behavior	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• code of ethics accepted and used by industry sector and country</li> <li>• importance of acting ethically</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• take responsibility for obligations, actions and decisions</li> <li>• represent capabilities and conditions accurately and without deception</li> <li>• exhibit fairness and transparency in all transactions and interactions</li> <li>• adhere to ethical standards of conduct</li> <li>• develop, implement and enforce policies and procedures that promote ethical practices and behaviors</li> </ul>

32.04	Work with colleagues	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• standards of behavior and performance expected by organization</li> <li>• communication plan and protocols</li> <li>• appropriate protocols, e.g., dress, VIP</li> <li>• meeting or event details, e.g., features, critical path</li> <li>• social and cultural differences</li> <li>• roles and responsibilities of colleagues</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify colleagues' needs and expectations</li> <li>• consult with colleagues when making decisions to obtain other points of view</li> <li>• advise colleagues of difficulties that may impact work</li> <li>• communicate regularly and listen to others</li> <li>• respect roles, responsibilities, interests and concerns of colleagues</li> </ul>
32.05	Work in a diverse environment	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• general characteristics and key aspects of main social and cultural groups encountered</li> <li>• types of disabilities and implications for the workplace</li> <li>• appropriate protocols, e.g., dress, VIP</li> <li>• meeting or event details, e.g., features, critical path</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• communicate with colleagues from diverse backgrounds</li> <li>• identify issues that may cause conflict in the workplace</li> <li>• accommodate colleagues and customers with special needs</li> <li>• consider and understand cultural differences/etiquettes when difficulties occur</li> <li>• seek assistance when required, e.g., refer to appropriate resource person</li> </ul>
32.06	Manage time	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• time management tools and how they are used</li> <li>• meeting or event details, e.g., features, critical path</li> <li>• interrelatedness of timelines of meeting or event elements</li> <li>• implications of communication/data flow on timelines</li> <li>• need to balance quality of meeting or event, timelines and deliverables</li> <li>• impacts of timelines on budgets</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• set and prioritize short- and long-term goals</li> <li>• outline objectives to be achieved for each goal</li> <li>• identify tasks that need to be completed for each objective: <ul style="list-style-type: none"> <li>- prioritize tasks according to importance and urgency</li> <li>- state performance measure to be used</li> <li>- determine how much time each task will take</li> </ul> </li> <li>• use time management system, e.g., day planner, computer</li> <li>• create action plans</li> <li>• schedule tasks</li> <li>• monitor progress of tasks and action plan</li> <li>• review goals and objectives periodically</li> </ul>
32.07	Manage stress	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• when and how to say 'no'</li> <li>• time management</li> <li>• stressors</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• attend to own personal, physical, emotional and spiritual needs</li> </ul>

		<ul style="list-style-type: none"> <li>• maintain a sense of humor</li> <li>• recognize own limitations</li> <li>• identify personal indicators of stress</li> <li>• recognize how own stress and attitude affects others</li> <li>• establish a comfortable work environment</li> <li>• take action to reduce stress, e.g., balance home and work life, set realistic goals, engage in hobbies</li> <li>• ask for assistance when needed</li> </ul>
32.08	Make decisions	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of timing when making decisions</li> <li>• integrated communication plan</li> <li>• who has final decision-making authority for all aspects of meeting or event</li> <li>• importance of having all facts prior to making decisions</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify issues</li> <li>• assess time constraints</li> <li>• identify effects on other areas of organization or meeting or event</li> <li>• make choices in timely manner</li> <li>• document details, action taken and results, when necessary</li> </ul>
32.09	Solve problems	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• importance of timing when solving problems</li> <li>• importance of correct problem resolution, e.g., customer satisfaction, organizational efficiency</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify and investigate problem</li> <li>• assess severity of problem</li> <li>• think creatively</li> <li>• analyze and determine possible solutions objectively</li> <li>• identify what can be controlled to resolve problems</li> <li>• choose and implement best solution</li> <li>• follow up to ensure problem is resolved</li> <li>• monitor outcome</li> <li>• document details, action taken and results</li> <li>• communicate results to appropriate parties</li> </ul>
32.10	Keep up to date with changes in meeting and events industry	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• industry publications</li> <li>• industry websites</li> <li>• industry associations and their social functions</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• source and access information on current and emerging: <ul style="list-style-type: none"> <li>- trends</li> <li>- ethical and legal issues</li> <li>- technology</li> </ul> </li> <li>• network with colleagues in the meeting or events industry</li> <li>• research competition</li> </ul>

32.11	Facilitate continuous improvement	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• best practices</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• develop strategies to ensure team members are encouraged to participate in decision making processes and take initiative</li> <li>• communicate continuous improvement strategies to all stakeholders</li> <li>• monitor and adjust performance strategies, e.g., source new technology</li> <li>• improve customer service strategies through ongoing review of techniques and processes</li> <li>• liaise with staff and volunteers to identify opportunities for improvement</li> </ul>
32.12	Participate in professional development activities	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• industry resources, e.g., associations, publications, educational opportunities</li> <li>• membership requirements in professional associations</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• participate in industry associations</li> <li>• read industry publications, e.g., journals, magazines</li> <li>• network with other meeting or event practitioners and professionals</li> <li>• participate in educational opportunities, e.g., attend courses, workshops and seminars</li> <li>• pursue professional designations/accreditations</li> </ul>

**SKILL 33** Conduct Business Communications

(contextual information not applicable)

**Common Knowledge:**

- Organizational policies and procedures
- Organizational structure
- Protocols, e.g., communications, appearance, VIP
- Communication needs and preferences of audience(s), e.g., cultural differences
- Meaning of technical terms and industry jargon

Subskills		Knowledge and Abilities
33.01	Communicate verbally	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• information requirements</li> <li>• public and non-public information</li> <li>• importance of listening</li> <li>• legal requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• consider needs and limitations of audience</li> <li>• organize ideas before speaking</li> <li>• ensure information is current, accurate and complete</li> <li>• determine appropriate time and place to deliver message</li> <li>• be concise</li> <li>• speak clearly</li> <li>• vary tone, volume, inflection and rate of speech</li> <li>• make eye contact</li> <li>• exhibit appropriate non-verbal behavior</li> <li>• be considerate of listener(s)</li> <li>• confirm understanding, e.g., ask for feedback, review what was explained</li> <li>• encourage and answer questions</li> <li>• minimize interference or disruptions when communicating</li> </ul>
33.02	Communicate in writing	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• business writing formats, e.g., letters, reports, press releases</li> <li>• public and non-public information</li> <li>• legal requirements</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• provide current, accurate, complete and concise information</li> <li>• use format, tone and style suited to purpose</li> <li>• consider audience, e.g., needs, reading ability, technical understanding</li> <li>• organize ideas logically</li> <li>• be clear and concise</li> <li>• proofread</li> <li>• keep copy on file</li> </ul>
33.03	Use communication tools	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• office technology</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• use business communication technology effectively, e.g., telephone system, email</li> <li>• choose appropriate technology for the message, e.g., fax documents with signatures</li> <li>• check for messages regularly and respond in a timely fashion</li> </ul>

33.04	Make effective presentations	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• technology related to presentation, e.g., software, how to operate hardware</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• identify prospective audience's background and motivation for attending presentation</li> <li>• research topic</li> <li>• organize material logically</li> <li>• use language appropriate to audience</li> <li>• speak clearly</li> <li>• vary tone, volume, inflection and rate of speech</li> <li>• be accurate</li> <li>• use presentation aids, e.g., audio, visual, print</li> <li>• prepare support materials , e.g., brochures, pamphlets, registration forms</li> <li>• arrive early and set up room</li> <li>• interact with audience, e.g., make eye contact</li> <li>• keep presentation within time limit and on topic</li> </ul>
33.05	Plan and conduct meetings	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• purpose of meeting</li> <li>• meeting's level of authority</li> <li>• consequences of inaccurate recording and filing practices, e.g., legal implications</li> </ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"> <li>• establish purpose and objectives of meeting</li> <li>• identify who should attend meeting</li> <li>• determine type of meeting required, e.g., information-sharing, decision-making</li> <li>• confirm availability of key participants</li> <li>• prepare for meeting: <ul style="list-style-type: none"> <li>- draft outline or agenda</li> <li>- make meeting room arrangements</li> <li>- determine resources or materials required</li> </ul> </li> <li>• invite participants: <ul style="list-style-type: none"> <li>- provide sufficient notice</li> <li>- state importance and preparation required</li> <li>- supply information, e.g., agenda</li> <li>- state date, time and place of meeting</li> </ul> </li> <li>• start on time</li> <li>• set parameters at beginning of meeting</li> <li>• ensure minutes are recorded and distributed</li> <li>• facilitate meeting: <ul style="list-style-type: none"> <li>- encourage constructive contributions from participants</li> <li>- keep discussion on time and on topic</li> <li>- manage time with flexibility</li> <li>- summarize discussion at key points</li> </ul> </li> <li>• adjourn meeting at scheduled time</li> <li>• ensure that follow-up is completed: <ul style="list-style-type: none"> <li>- take decisions and action plans forward to those responsible</li> </ul> </li> <li>• evaluate whether meeting was effective</li> <li>• identify ways to improve future meetings</li> </ul>



33.06	Establish and conduct business relationships	<p><b>Knowledge of:</b></p> <ul style="list-style-type: none"><li>• industry networking</li><li>• legal issues affecting agreements</li></ul> <p><b>Ability to:</b></p> <ul style="list-style-type: none"><li>• establish relationships in manner that promotes goodwill and trust between organization, customers and suppliers</li><li>• build trust and respect through effective communication</li><li>• maintain regular contact with customers and suppliers</li><li>• confirm agreements in writing, using formal contracts where appropriate</li><li>• gain appropriate approvals for formal agreements</li><li>• identify need for and seek specialist advice when appropriate</li><li>• honor agreements</li></ul>
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## APPENDICES / ACKNOWLEDGEMENTS

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## CTHRC *IEMS* SURVEY

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During the validation phase, more than 150 event practitioners responded to the validation survey, thereby providing their feedback on the relevance and criticality of each skill contained in the standards. Survey respondents work and/or teach in the following countries and areas.

#### Countries surveyed

- Australia
- Bahrain
- Belgium
- Canada
- Germany
- Ireland
- Netherlands
- New Zealand
- Oman
- Qatar
- Saudi Arabia
- South Africa
- Taiwan
- Thailand
- Turkey
- Uganda
- United Arab Emirates
- United Kingdom
- United States
- Zimbabwe

#### Industry Associations

- International Festivals and Events Association
- International Special Events Society
- MPI

#### National Skills Sector Bodies

- People 1st, United Kingdom
- Services SETA, South Africa
- Service Skills, Australia

## APPENDICES / BIBLIOGRAPHY

### Resources Used to Develop the *Meeting and Business Event Competency Standards*

Canadian Tourism Human Resource Council (2010). *Event Management - International Competency Standards*. Ottawa, Ontario.

APEX Project & Glossary

CMP Blueprint

### Resources Used to Develop the *Event Management - International Competency Standards*

The following list presents sources used in the creation of the *Event Management - International Competency Standards*. These resources encompass various publications and initiatives from different countries and international associations, and are presented in alphabetical order.

Australian Government Department of Education, Science and Training (2007). *SIT07 Tourism, Hospitality and Events Training Package*:

- Volume I Overview
- Volume II Cross-Sector Units of Competency Part 1
- Volume III Cross-Sector Units of Competency Part 2
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- Secondary resources (current and past versions) include:
  - Association for Convention Operations Management (ACOM) Core Competencies
  - ASAE CAE Exam Blueprint
  - Australian TAFE standards and Service Skills Australia competency
  - Certified Hospitality Sales Professional (CHSP) Core Competencies
  - CIC APEX Project & Glossary
  - CIC Job Analysis (New CMP Blueprint)
  - CMP Blueprint
  - CSEP Blueprint & Competency Outline (as of 2007)
  - CTHRC EVC & EVM Standards
  - Event Solutions Services Sort Fields
  - Global Performance Based Standards for Project Management Personnel
  - GWU Event Management Program core courses curriculum (2000)
  - IFEA Core Curriculum and Oglebay Park Curriculum
  - Illinois Occupation Skill Standards
  - Johnson & Wales Event Leadership DACUM
  - E.U. Leonardo Project MATRIX
  - MPI curricula
  - Ontario Curriculum Standards
  - PCMA Principles of Professional Performance

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- Temple University Event Leadership curriculum
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- National Certificate—Event Coordination NQF Level 5, September 2007
- National Diploma—Event Coordination NQF Level 5, October 2007

## ABOUT THE CANADIAN TOURISM HUMAN RESOURCE COUNCIL

The Canadian Tourism Human Resource Council (CTHRC) is one of 33 national sector councils whose overall goal is to improve the quality of the Canadian labor force and to help businesses be more flexible in meeting changing competitive demands. Regarded as an exemplary council by Human Resources and Skills Development Canada, the CTHRC conducts research, manages development projects and undertakes collaborative activities to increase labor and learner mobility including skills development, labor market research, newcomer integration, recognition of foreign qualifications and credentials and a comprehensive suite of National Occupational Standards, training and certification resources marketed under the emerit Tourism Training brand.

## ABOUT MEETING PROFESSIONALS INTERNATIONAL

Established in 1972, Meeting Professionals International (MPI) is the leading global community committed to shaping and defining the future of the meeting and event industry. As the largest trade association for the meeting industry, MPI defines the return on investment and strategic value meetings bring to individuals, organizations and the global economy. MPI helps its members enhance their professional value by providing them with best practices, superior education, latest research and trends, professional development and networking opportunities.

### **MPI Vision**

To build a rich global meeting industry community.

### **MPI Mission**

To make our members successful by building human connections through knowledge and ideas, relationships and marketplaces

Along with MPI's mission to build connections through knowledge and ideas, one of the members' Principles of Professionalism is to "actively pursue educational growth through training, sharing of knowledge, expertise and skills, to advance the meeting industry."

MPI plays a leadership role in the development of their members and the meeting industry and believes that these standards will play an integral part in this role.

### **MPI Global Training Practice**

In 2007, MPI recognized the need for a body of knowledge that would guide the development of meeting and business event professionals around the world. Since that time, it has worked with industry partners to establish a career and learning plan that clarifies expectations and contributes to consistency in and recognition of credentials throughout the global meeting industry.

The goals of the Global Training Practice are as follows.

- To define the body of knowledge and skills that are required by meeting and business event professionals at an expert level
- To provide clear and multiple career paths
- To provide guidance and training resources that allow professionals to accelerate mastery of the body of knowledge and skills
- To promote recognition and transferability of knowledge, skills and credentials on a global basis

As part of that goal, MPI has worked with experts in the meeting and business event industry to develop education and training materials that are based on these standards. For more information about MPI's Global Training Practice, visit [www.mpiweb.org/Education/Global-Training/Home](http://www.mpiweb.org/Education/Global-Training/Home).

In addition to the learning resources provided through the Global Training Practice, there is an array of other training and career development opportunities (live events, distance learning, searchable Web content, journals, chapter programs) that allows for continuous learning. Where applicable, organizations offering learning experiences for meeting and business event professionals are encouraged to develop or revise their products so they reflect the competencies described in these standards. A curriculum guide will be available to educators and trainers to assist with these activities.