



**CEM LEARNING
CEM PROGRAM**
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Conference and Meeting Management



Table of Contents

ABOUT THE CEM LEARNING PROGRAM	4
LEARNING OBJECTIVES	5
LEARNING EXPERIENCES AT EXHIBITIONS	6
TYPES AND RESPONSIBILITIES OF MEETING MANAGERS/PROFESSIONALS.....	7
MEETING AND EVENT FORMATS	8
Formats	8
Types of Educational Meetings/Sessions	9
Business Meetings Held During Exhibitions/Events	9
PROGRAMMING AND EDUCATIONAL OFFERINGS	10
Needs Assessment.....	10
Attendee Needs and Demographics.....	10
Meeting Objectives	10
Program Objectives	11
Learning Objectives	11
Major Categories of Learning Outcomes.....	12
ADULT LEARNING PRINCIPLES	13
EVALUATION PROCESSES.....	15
Evaluation Considerations.....	15
Continuing Education	16
LEARNING ENVIRONMENT DESIGN AND DELIVERY CONSIDERATIONS	17
Exhibition Learning Formats	18
Challenges to Successful Exhibit Floor Education	19
EDUCATION MEETING ENVIRONMENTS	20
Instructional Aids.....	20
The Use of Projection.....	21
Usable Seating Capacity	21
SPEAKER MANAGEMENT.....	23
CULTURAL CONSIDERATIONS	24
ROOM SETS	26
Types of Room Set-Ups.....	26
Set-Up Configurations for Small Meetings	31
BUDGETING BASICS	34
Meeting Revenue.....	34
Meeting Expenses.....	34
MANAGEMENT CONSIDERATIONS.....	35



Project Management	35
WORKING WITH VENDOR TEAMS	36
On-Site Team	36
Facility Partners	37
Technology Partners	37
Audio Visual Partners	38
Production Companies	39
Food and Beverage Partners	39
Housing Partners	41
Registration	42
Travel and Transportation Management	43
International Attendance	44
SPECIAL CONSIDERATIONS	45
Planning Sustainable Meetings, Events and Exhibitions	45
Music Licensing	46
Diversity	47
ADA Considerations	47
KEY TERMS	49



ABOUT THE CEM LEARNING PROGRAM

This workbook is intended to serve as the student's guide for the CEM Learning Program on Conference and Meeting Management. It is based upon the Curriculum Blueprint approved by the CEM Commission and content from several chapters of *The Art of the Show*, 5th Edition (AOS). While the AOS is not an obligatory CEM Learning Program textbook, it is an additional resource and optional reference for this and other CEM Learning Program courses.

The CEM Learning Program is not a basic introductory course of study. It is designed for adult learners who have accrued at least three years of full-time work experience in the exhibitions and events industry. Its goal is to provide students with enhanced knowledge, skills and insights derived from their interactions with peers who are also learners, from CEM faculty who serve as subject matter experts, and from the readings and exercises that are assigned.

CEM Learning Program courses are available for in-person, virtual and on-demand classes. The content and final exams for each course are the same for all learning options. In-person and virtual students are expected to read the CEM workbook prior to class. Students taking a CEM on-demand course will read the workbook throughout the length of the course.

Students will be tested on the knowledge they acquire from this course. It is important to understand that the information provided in this workbook may differ from the practices and experiences of each student.

The examination is made up of 40 multiple-choice and true/false questions. To pass the examination, a student must achieve a score of at least 30 out of 40. CEM faculty do not have access to the CEM exams, nor are they aware of any questions that may appear on each examination. Exam questions are based only on information contained in this course workbook.

Throughout this workbook, the terms "exhibition manager" and "show organizer" are used interchangeably. Their meanings are the same - the individual who is responsible for overseeing the planning, management and execution of an exhibition.

Since general business fundamentals apply to multiple aspects of exhibition management, core concepts relevant to more than one course topic may appear in several learning courses. Students with little or no foundation in marketing and finance are encouraged to take the Event Marketing and/or Finance, Budgeting and Contracts courses early in the course of their CEM Learning Program studies.

Key terms are identified in this module by bold face type and accompanied by a definition. Those noted with an asterisk (*) are from the *Events Industry Glossary* developed by the Events Industry Council (<https://insights.eventscouncil.org/Industry-glossary>).

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LEARNING OBJECTIVES

After completing this course, students should be able to:

- Identify different types of meetings
- Compare education and programming formats
- Explain adult learning theory
- Select appropriate speakers for a program
- List common room set-ups based on meeting type and size
- Describe basic requirements for conference related housing, travel and transportation
- Prepare Event Specification Guides and Function Set-up Orders
- Organize ADA- compliant and accessible meetings (U.S. only)



LEARNING EXPERIENCES AT EXHIBITIONS

In addition to face-to-face buying and selling activities, exhibitions offer opportunities for learning, discovery, skills development and career advancement. A Center for Exhibition Industry Research (CEIR) study notes that an important driver of repeat attendance to exhibitions is access to learning opportunities on the show floor (CEIR Attendee Floor Engagement Study, Part 7, 2017). To attract, engage and educate attendees, exhibitions now include areas for interactive workshops, hands-on demonstrations, product theaters or showcases, educational stages and learning pavilions. This has caused a new set of challenges to the organizer seeking to create a conducive learning setting on the exhibition floor. Noise intrusion, lighting issues and obstacles that may hinder the proper functioning of audiovisual equipment are just a few issues now routinely addressed by organizers.

An exhibition can also serve as an extension of a formal educational program, such as what often occurs at association annual meetings. In these cases, learning activities occur concurrently with the exhibition and take place elsewhere, usually in adjacent spaces within the congress/convention center and/or at nearby hotels.

Some core components of meeting and exhibition management are similar, while others require special knowledge and skills. Since exhibition managers must often work closely with their organization's meeting and education manager(s), familiarity with the basics of the meeting planning process is most useful.

Learning has become a vital part of most meetings, events and exhibitions. Whether formal, such as credit granting **continuing education** programs, training sessions or seminars, or informal, such as exhibitor-provided demonstrations, presentations or networking, they add significant value to the face-to-face experience. Depending upon the program objectives, each learning opportunity may require a purpose-built learning environment. It is essential that learning modes and meeting room set-ups be in proper alignment.

Important aspects of the planning process include proper budgeting and analysis, creating effective room sets, using audiovisual aids to support event objectives, addressing the objectives of the event, and working efficiently with venues, (hotel, convention center, etc.) contractors, speakers and temporary and/or permanent staff.



TYPES AND RESPONSIBILITIES OF MEETING MANAGERS/PROFESSIONALS

A **meeting manager** (or also referred to as a meeting professional) oversees and arranges every aspect of an event, including planning, organizing and implementing of a variety of meetings, conferences and conventions/congresses for a range of entities. They usually are described in relation to one of the following categories:

Corporate Meeting Manager/Professional	Employee of a company, most often a for profit entity
Association Meeting Manager/Professional	Employee of a not-for-profit organization or association management company representing non-profit entities
Independent Meeting Manager	Self-employed professional hired on a per project basis to provide planning, organization and on-site services as required to a variety of clients
Meeting Management Company	A company, representing another organization, handling site selection, contract negotiations and turnkey support for an event

Responsibilities of meeting managers may include:

- Consulting with customers and associates to determine objectives and requirements for events such as meetings, conferences and conventions
- Planning and developing programs, agendas, budgets and services that address the internal or external client's requirements
- Conduct site inspection and the selection of event facilities that meet or exceed the requirements for the meeting and its attendees/visitors
- Arranging and overseeing event services, such as housing and transportation, speakers, audiovisual services and equipment, food and beverage functions, signage, displays, printing and event security
- Addressing the **special needs** of attendees such as dietary, mobility, medical, religious, etc.
- Reviewing event-related invoices for accuracy and approving for payment
- Maintaining records of event specifications, including financial details
- Conducting post-event evaluations to determine improvements for future events

MEETING AND EVENT FORMATS

To achieve meeting and event objectives, the meeting professional should understand all the various meeting and event formats along with their elements and determine which is best to carry out the objectives.



FORMATS

Conference: Participatory meeting designed for discussion, fact-finding, problem solving and consultation; event used by any organization to meet and exchange views, convey a message, open a debate or give publicity to some area of opinion on a specific issue; usually short duration with specific objectives, generally smaller than congress or convention.

Congress: Regular coming together of large groups of individuals to discuss a particular subject; European, Mexican and Latin American term for convention; will often last several days and have several simultaneous sessions; length of time between congresses usually annual, although can be less frequent.

Convention: Gathering of delegates, representatives, members of a membership or industry organization convened for a common purpose; typically, recurring events with specific, established timing; educational sessions, committee meetings, social functions and meetings to conduct governance business of an organization; known as congress in areas of the world outside the U.S.

Exhibition: Event at which products, services or promotional materials are displayed to attendees visiting exhibits on show floor; focus is primarily on business-to-business (B2B) relationships.

Meeting: Event where the primary activity is to attend educational sessions, participate in meetings/discussions, socialize or attend other organized events; there is no exhibit component to this event.

Special Event: One-time event staged for the purpose of celebration; a unique activity.

TYPES OF EDUCATIONAL MEETINGS/SESSIONS

Seminar: Lecture and dialogue allowing participants to share experiences in a specific field under guidance of an expert discussion leader; meeting or series of meetings of a small group of specialists with different skills and specific common interest, who come together for training or learning purposes.

Training Session: Structured learning session in which an instructor presents specific information and techniques.

Workshop: Meeting of several persons for intensive discussion; workshop concept developed to compensate for diverging views in a discipline or on a specific subject; informal and public session of free discussion, on a subject chosen by participants themselves or suggested by the organizers; training session in which participants develop skills and knowledge in a given field.

General (Plenary) Session: A meeting open to all participants at an event.

BUSINESS MEETINGS HELD DURING EXHIBITIONS/EVENTS

Annual Membership Business Meeting: Annual business meeting legally required by the bylaws of an association or corporation; common for association-sponsored exhibitions to be co-located with organization's annual convention/congress, at which annual membership meeting usually takes place; publicly held corporations required to conduct annual meeting of stockholders.

Board of Directors Meeting: Meeting of the governing body of an organization.

Committee Meetings: Appointed members meet to pursue an agenda with goals and objectives. An exhibitor advisory committee is an example where representatives of an event's exhibiting companies act as advisors to show management on procedures, needs of exhibitors, marketing and growing the show.



CEM Commission meeting at Expo! Expo! IAEE's Annual Meeting & Exhibition



PROGRAMMING AND EDUCATIONAL OFFERINGS

Once learning needs have been identified, the purpose of the meeting can be defined, and the educational content can be developed to fulfill attendee needs. Developing educational content that is **learner-centered** maximizes the attendee's learning potential.

NEEDS ASSESSMENT

A **needs assessment** is a systematic approach to gather and analyze data to determine and address needs or "gaps" between current conditions and desired conditions. The information obtained in an educational needs assessment becomes the basis for development of the program and learning objectives.

ATTENDEE NEEDS AND DEMOGRAPHICS

When designing educational content and programming, it is important to have accurate data identifying a typical attendee profile, along with the needs assessment. Industry requirements (certification and credentialing), trends and developments also provide the basis for educational programming and the need for meetings.

In addition to age, gender, job description, income and level of influence over the buying decision, developing the attendee profile should include a comprehensive review of the learner's:

- Attitude towards professional development - A key question to ask might be, "Is continuing education required to remain in good standing within the industry the event or exhibition serves?"; Most people with a professional certification, credential or designation are required to take a prescribed number of courses during a given time frame.
- Educational level and professional status – People with differing educational backgrounds tend to gravitate towards different levels of educational programming and, more importantly, to different subject material.
- Position within a company – Organizational hierarchies often influence educational needs. Continuing professional development is what many people in "middle management" need to enhance opportunities for a career promotion.
- Financial options/requirements – Attendees' needs, expectations and commitment may change, depending on whether they or their organization will be paying the costs.
- Time constraints – Linking educational programs to an exhibition cycle is a logical way to maximize attendance. A key consideration is creating a balance that allows time on the show floor and time in educational sessions.
- Geographical location – Location is an important factor for events that draw a national and international audience.

MEETING OBJECTIVES

When setting any objectives for meetings, whether learning or business, it is important to follow the **SMART** method.

The term SMART stands for:



S Specific M Measurable A Achievable R Realistic T Time Specific

The SMART method requires that each objective be:

Specific	Targets a specific area of improvement
Measurable	Quantifies or at least suggests an indicator of progress
Achievable	Specifies who and how the objective will be accomplished
Realistic	States what results can be achieved given available resources
Time Specific	Specifies when the result(s) can be achieved

Setting **meeting objectives** defines the desired result and is the formalized statement of the anticipated results(s) of holding the meeting.

Example: "Improve attendee experience through innovative learning experiences."

PROGRAM OBJECTIVES

Meeting objectives encompass the overarching purpose. **Program objectives** clearly state anticipated results. They are the primary method by which both the intended content and outcomes are communicated.

Program objectives provide a:

- Starting point to determine the content of the educational meeting
- Foundation for developing the activity level and flow of the meeting (meeting dynamics)
- Starting point for assessing the program

LEARNING OBJECTIVES

Learning objectives clearly state the results the learner is expected to gain from the education program, such as specific knowledge and skills. They are set within the context of the overall program objectives, with which they should be consistent.

Objectives are generally measurable; however, not all learning objectives, (such as those dealing with a change in attitude, beliefs or feelings), can be measured numerically.



Setting learning outcomes provide:

- Consistent instructional design
- Consistent content
- Consistent selection of instructional techniques and strategies
- Baseline to evaluate and measure participant learning
- Guideline enabling learners to organize their own learning

Learning objectives are usually expressed as statements of:

Who	The learner
How	Action verb such as explain, propose, evaluate, etc.
What	Content to be learned, achieved, applied
How much	Criteria for acceptable performance; may be a measurable variable, possibly expressed in a percentage

Example: "Workshop participants [*who*] will be able to identify [*action verb*] three [*how much*] security concerns of outdoor festivals [*what*] in exhibition facilities."

MAJOR CATEGORIES OF LEARNING OUTCOMES

Three categories of learning outcomes (also known as learning domains) form the basis of an adult education objective statement. A common acronym associated with these educational objectives is KSA, which stands for Knowledge, Skills and Attitude.

These categories are:

Cognitive	Mental skills (knowledge)
Affective	Growth in feelings or emotions, attitudes or self (attitude)
Psychomotor	Manual or physical skills (skills)



ADULT LEARNING PRINCIPLES

Why do adults attend educational programs? Adult learners pursue education to attain a specific, practical goal. Adult education activities include basic skills training, apprenticeships, work-related courses and personal interest courses.

Reasons why adults attend educational programs:

- Obtain new and relevant information improving job performance
- Gain professional development to further a career or facilitate a job change
- Obtain continuing education credit to maintain credentials, certification or recertification
- Share experiences, solutions and challenges with industry colleagues
- Update knowledge, skills and abilities
- Enter the workforce or start a new business
- Earn a promotion or pay raise
- Satisfy employer's requirement or recommendation

Andragogy consists of learning strategies that are focused on **adult learners** and the structure surrounding their learning experience.

Insights about adult learners:

- Adults learn best from one another
- Adults want to hear, see and learn from what their peers and other adults have experienced
- Adults want to know, "*What's in it for me?*" (WIIFM)
- Adults tend to look for information that delivers immediate relevance to their work and real life
- Adults tend to lean toward their strongest style; instructional strategies must be utilized incorporating various learning styles, especially since different countries and cultures have different learning styles
- Adults bring a range of life experiences to the learning environment against which they assess, accept or reject new information and knowledge
- Adults tend to be self-directed learners, taking responsibility for their own learning
- Readiness to learn is often triggered by a change, a need for more knowledge to improve performance or to learn the knowledge, skills or abilities needed for a new position
- Adults tend to add the role of learner to an already long list of multiple life roles
- Time devoted to learning is usually taken at the expense of something else

To align an educational program with andragogy learning theory, the planner should ensure the following:

- Session descriptions clearly articulate the value of the program to learners
- Session descriptions incorporate adult learning theory to promote maximum audience engagement
- Speakers are encouraged to use a variety of instructional strategies in their sessions
- Each session offers a variety of presentation formats that appeal to the different learning styles of the attendees

- 
- Presentation formats are varied to include panels, whole-group discussions, demonstrations, workshops, seminars or breakout sessions



EVALUATION PROCESSES

Evaluations help determine if learning objectives are achieved; if a speaker's presentations and skills are effective; and where improvements, modifications and enhancements to programming will be beneficial.

Some accredited programs require a change in the attendee's behavior or measurement of a professional practice. The evaluation learning method tests whether attendees learned what was expected and if they can use the information effectively. This can be measured through observations and interviews.

There are two broad categories of evaluations:

Formative evaluations occur during an event. They allow speakers to monitor how well learners are achieving instruction goals and objectives and provide an opportunity to restructure the presentation, if necessary, for learners to master the materials.

Summative evaluations take place at the end of an event, typically at the end of a session or program day. They evaluate the effectiveness of a program based upon predetermined program and learning objectives. Learners are asked to respond to a series of closed-end and open-ended questions. Once analyzed, results can be used to plan future events.

Formative and summative evaluations are usually distributed electronically through a variety of modalities, including mobile apps, computer stations set up during an event and survey links emailed to attendees and/or posted to the event's website.

Evaluation activities specific to logistics may include on-site, pre-event and post-event meetings with the facility staff. These occasions provide opportunities to gather feedback about the event as it progresses. This concept will be explored further in later sections of this module.

EVALUATION CONSIDERATIONS

Evaluation takes place from the planning phase through post-event assessment.

- Provides benchmarks of success and reveals areas in need of improvement
- Proper evaluation of logistics and management components and processes are as important as those of the educational program
- Provides insights into problem areas, reveals methods for improvement, isolates any troublesome billing procedures or cost overruns

Evaluations should include comments and feedback received from all stakeholders including:

- Exhibitors
- Sponsors
- Speakers and attendees
- Meeting and facility staff



CONTINUING EDUCATION

Offering accredited continuing professional education can significantly increase the perceived value and desire to attend an event.

Continuing Education Credit (CEC) is a requirement of many professional groups by which members must certify participation in formal educational programs designed to maintain their level of ability beyond their original certification date. Continuing education programs encourage or require practitioners to maintain and expand their competency, knowledge and skills. Mandatory continuing education also helps them to stay up-to-date on new developments, procedures and technologies.

Professional organizations apply non-academic Continuing Education Units (CEU's) to formal educational programs for members seeking to increase their knowledge and/or maintain their professional certifications and designations.

College- and university-based course work provide opportunities to comply with continuing education requirements as do conferences and seminars.

LEARNING ENVIRONMENT DESIGN AND DELIVERY CONSIDERATIONS

There are various design options for educational meetings which include the following:

General/Plenary Session: Meeting open to all those in attendance at an event. They are designed to bring the whole group together at one time.



Opening General Session at Expo! Expo! IAEE's Annual Meeting & Exhibition

Break-Out Sessions: Small group sessions, panels, workshops or presentations offered within an event; occur apart from the general session; often sorted into basic/intermediate/advanced levels or divided by interest areas or industry segments.

Concurrent Sessions: Multiple sessions with different subjects scheduled at the same time.

Lecture: Informative and educational presentation to an audience.

Workshop: Meeting of several persons for intensive discussion; informal and public session of free discussion on subject chosen by participants themselves or suggested by the organizers; can also be a training session in which participants develop skills and knowledge in a given field.

Seminar: Lecture and dialogue allowing participants to share experiences in a specific field under guidance of an expert discussion leader; meeting or series of meetings of small group of specialists with different skills and specific common interest, who come together for training or learning purposes.

Training Session: Structured learning session in which an instructor presents specific information and techniques.

Distance Learning: A method of attending class even if the participant cannot be there physically; technology bridges the gap between the participant and instructor; can be done from the participants home so it is designed to be accessible no matter where the participants is in the world; done through webcams, chat programs or websites.



elearning: A style of learning designed to create online communication between the instructor and participant; makes learning more interactive; convenient for adult learners; participants go at their own pace.

*Distance Learning and eLearning are often used interchangeably, but they are actually two separate entities.

EXHIBITION LEARNING FORMATS

While this course is focusing more on learning formats off the exhibition show floor, it is important to note that show organizers and meeting professionals can offer training and education on an exhibition floor.

Promoting the exhibit hall as an extension of the education program will require the show organizer to recruit the support of exhibitors. Because many exhibitors possess unique and valuable insight about products, processes, markets and applications, they can be especially valuable sources of additional education.

Exhibitions offer a broad experiential learning environment. Attendees and exhibitors are exposed to many new concepts, products and services from many types of interaction and perspectives.

Exhibition attendees can learn about new products and services, new product applications and new uses. Exhibition visitors learn about previously unknown companies that might improve their professional and personal lives. Attendees can learn through active engagement with an exhibit representative or just by spending a few seconds examining a display to determine the merits of further time and exploration.



Exhibit Floor Educational Session at Expo! Expo! - IAEE's Annual Meeting & Exhibition

All marketing materials, beginning with the event prospectus and continuing with exhibitor communications and updates, should emphasize the role of education on the exhibition floor. Marketing materials, promotional opportunities, exhibitor training programs, and exhibitor evaluations must stress that education on the exhibition floor is an essential and integral part of the exhibition experience.





Exhibition organizers must work with exhibitors to create an educational environment on the exhibition floor – one that features knowledge centers, interactive displays, hands-on product demonstrations, and adult learning experiences where attendees can learn from other attendees and not just the booth sales representatives. Floor space should be allocated to such learning experiences, and exhibitors should be encouraged to do the same inside their exhibits.

CHALLENGES TO SUCCESSFUL EXHIBIT FLOOR EDUCATION

Because the environment of a typical exhibition is not specifically designed for learning, there may be unique challenges such as:

- Ambient noise
- Appropriate lighting for activities in different floor locations
- Audiovisual equipment adjustments to provide proper projection in bright area

Some presentation areas are in the open and might need the use of headsets and some are in private areas with walls.



EDUCATION MEETING ENVIRONMENTS

The meeting environment affects physical, emotional, psychological, physiological and social aspects of the learning experience and includes:

- Program content
- Instructional aids
- Resources
- Presenters (speakers who deliver content)

Meeting rooms selected for adults learning programs should provide:

- Optimal sight lines from every point in room
- Adequate comfortable personal space provided
- Adequate workspace provided; individual workspace determined by session content, instructional design, program outcomes, session time, complexity of content
- Cultural considerations; religious, military protocol issues affecting seating
- Participant special needs or assistance such as wheelchairs, audio augmentation, interpretation required
- Number and placement of access/egress points sufficient for safety and minimal disturbance during presentation

Note: Detailed information regarding specific types of meeting room set-ups is addressed in the Meeting Management Logistics section of this workbook.

INSTRUCTIONAL AIDS

Audio and visual aids are used to support education sessions and presentations as well as other activities. The location of AV equipment and staff must be included in all room set-ups. During the planning of the on-site room assignments, the venue, timing of the sessions and speaker needs should be considered to minimize audiovisual-related costs and effectively utilize technical support staff.

If sessions are offered via streaming video, the Internet, webinars, webcasts, podcasts, on CD or other media, the additional logistics and costs should be considered in the pre-meeting planning.

Services typically provided by an AV Contractor include:

- Meeting room AV equipment and labor
- Webcasting and podcasting services
- General session staging
- Audience response systems
- Free-standing audio systems
- Presentation management systems
- Lighting systems and rigging
- Computer hardware rental
- Simultaneous interpretation services
- Design logistics and pre-planning support

- 
- Video-conference and satellite remote sessions
 - Program capture and archival services
 - Video program production and presentation

Instructional aids include equipment, materials and teaching support featuring sound and/or sight experiences; streaming video, film, PowerPoint (slides) and Flash presentations, computer data projection, flip charts, sound equipment, black/whiteboards.

Visual Aids are materials used in a presentation that provide graphic image to help clarify or demonstrate a point to the audience; most visual aids require use of a projector or plasma screen; size of screen depends on the size of room, room set-up, size of group and projection equipment; audiovisual contractor is best source to determine right-sized screen for a session.

THE USE OF PROJECTION

When using projection as part of your meeting, ensure that there is a clear and unobstructed view of the speaker from all locations within the room. It is extremely important to have a clear view of the screen as learning could be impacted.

Projection distance: Space measured in feet/meters from projector to screen.

There are actual rules for the use of projection. These are important to remember when planning which room to use for which type of session.

Remember to use these general rules when using projection:

- Top of screen at least one foot from the ceiling
- Bottom of screen minimum of four feet from the audience floor

Example: In a 20-foot room, screen should be 15 feet high at the most (one foot from ceiling and four feet from floor = 5 feet from 20 feet or 15 feet).

- Width of screen minimum of 1/6th the distance from the screen to the last row of seats

Example: If last row of audience is 120 feet away, screen should be at least 20 feet wide (1/6th of 120 feet).

- First row of seats approximately two screen heights away

Example: If screen is 15 feet high, first row of audience seating should be 30 feet away from the screen.

- Width of each row should not exceed distance from first row of seats to screen

USABLE SEATING CAPACITY

Usable seating capacity consists of the net square feet/meters available for seating once all hindrances (e.g., columns, doorways, etc.) and restrictions have been considered, along with the following:

- Center aisle between seating sections if required
- Aisle along each side of room if required, depending on placement of access/egress doors

- 
- and fire regulations
 - Distance between rows



SPEAKER MANAGEMENT

In general, **speakers** are content experts who deliver subject matter to participants. They commonly deliver keynote presentations or speeches at general sessions, lead seminars, serve as trainers and workshop leaders and present motivational messages.

When developing **speaker's guidelines**, the planner should:

- Require references from groups that have engaged the speaker recently and check each reference
- Verify that speakers are:
 - Skilled presenters with good platform skills
 - Adept users of audiovisual aids and able to design effective visual presentations
 - Conversant with adult-learning theory
 - Familiar with the industry segment to be addressed
 - Competent using a variety of instructional strategies that will meet the needs of a diverse audience
- Provide detailed program information in advance, including:
 - Outline of the program and learning objectives
 - Policies for speaker reimbursements, travel, honoraria
 - Audiovisual equipment order form
 - Required forms and disclosures related to educational approval guidelines
 - Information about preferred method(s) of presentation format
 - Requirements and deadlines for submission of handout materials
- Require learning objectives in advance for marketing and session evaluation
- Have a process to collect and manage presentations
- Provide a **speaker ready room** throughout the event exclusively for speakers to work, relax, test audio-visual equipment, rehearse or prepare prior to or between sessions



CULTURAL CONSIDERATIONS

Not all cultures live by the clock. Time orientated cultures such as the British or Germans will have strict approaches to how meetings run. The start time, finishing time and all the different stages in between will be planned carefully. Other cultures will see the start time as an approximation, the finish time as non-fixed and all the different stages in between as flexible.

The hierarchical nature of a culture can have a massive impact on the input given by participants in an international meeting. For those from hierarchical cultures speaking one's mind, criticizing ideas, disagreeing openly, giving feedback and reporting problems in front of the boss or manager are all areas they would feel uncomfortable with. To offer a criticism of the manager's idea would be seen as a loss of face for both the manager and the criticizer.

After a few pleasantries in the meeting room, the common term in the West is, 'let's get down to business'. Western meetings generally run to a tight schedule with an organized, pre-planned agenda. Meetings are for business. On the other hand, different cultures see the meeting as the arena for building personal relationships and strengthening bonds. Getting down to business comes further down the priority list.

When chairing an international business meeting it is always advisable to bear in mind the attendees' cultures and backgrounds. Is it a very varied group or do the majority of participants have cultural similarities? Think about their approaches to meetings. How have they acted in meetings before? Can cultural reason why be identified?

In highly diverse international companies, there may be participants in a meeting from the four corners of the globe. Each will have their own cultural etiquettes, gestures, mannerisms and ways of expression. Shouting, throwing hands around and even storming out of meetings are all possibilities. It may be advisable to provide inter-cultural awareness training to staff to minimize misunderstandings.

Prior to the meeting make it clear what the purpose of the meeting will be. What is the goal of the meeting? What is expected from attendees? Contact the participants and discuss the meeting and what is required of each person. If ready, send them the agenda. If it is a brainstorming meeting, ask each participant to bring at least three suggestions with them. If it is a meeting bringing together different areas within a company, let each attendant know what people would like to hear about from them. Once a framework is in place people will know where they fit into the picture.

Many people find business meetings daunting. This may be a combination of stage fright, sitting in front of the boss and feeling inferior to colleagues. This will lead to anxiety, tension, nervousness and general discomfort. Try introducing subtle differences to a meeting to put people at ease. Ice breakers offer a good tension release at the beginning of a meeting. Warm ups offer a similar benefit. Try using an alternative setting instead of the meeting room. Consider changes in the lighting or ambience.

In short, small groups will work more effectively in meetings. Smaller groups offer increased security and allow for greater participation.

Different cultural assumptions as to the meaning of a word, phrase, symbol, picture or agreement can



cause confusion before and after a meeting. When approaching a topic or after consensus has been agreed upon a subject always confirm that the general meaning has been agreed upon and understood.

At the end of a meeting, summarize and capture the main agreements and disagreements. Ensure everyone is happy with them.



ROOM SETS

Appropriate meeting room assignments and set-ups create the environment for both the business of the meeting and the learning that will take place. The decision to select a style of room set-up should be aligned with the objectives of the meeting. It is vital to obtain accurate measurements of a room so that audiovisual equipment, staging and seating can be properly deployed.

Facility staff and service contractors play vital roles in planning room set-ups. With their assistance, the planner can create a space that maximizes the attendee's experience, ensures that the program and meeting goals are met, and facilitates free and open communication between presenters and the audience.

Options to consider when selecting function space and room set-up include:

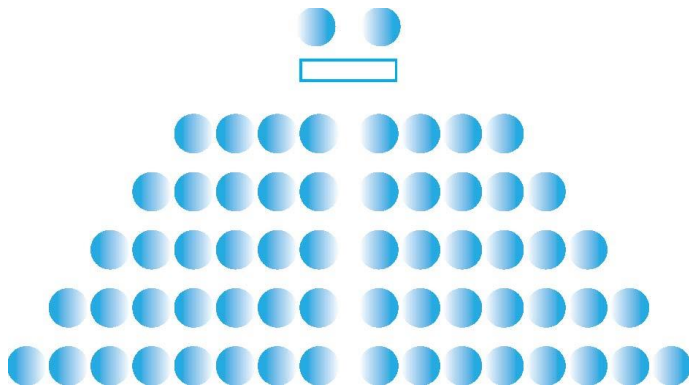
- Meeting objectives – program and learning objectives
- Presentation type – formal or informal
- Anticipated level of participant interaction
- Safety of attendees
- Audiovisual equipment requirements
- Required space for screens, staging and seating
- Focus of the speaker/presenter
- Accommodations for people with disabilities
- Traffic flow into and out of the room
- Convenience to and location of services (restrooms, food and beverage service areas)
- Lighting and sound controls
- Room rental and re-setting

TYPES OF ROOM SET-UPS

There are several room set-up styles that can be used for various types of meetings. Before a specific room set-up style can be selected, the purpose of the meeting and the activities taking place must be identified. The general rule is to allow three feet for each person, if tables and chairs are utilized. The following are the most common set-ups used for meetings.



Theater or Auditorium Set-Up: Seats (no tables) set in rows facing the stage area, head table, stage or speaker. Variations are semicircular and V-shaped.



Generally used for large groups (200 or more), this set-up maximizes room capacity and provides a central focal point, although there is limited interaction with the presenter.

Limitations include difficult note-taking, obstructed sight lines from the rear of the room and limited space for personal items.

Set-up guidelines to consider:

- First row of chairs no closer than 6 ft/1.8 m from edge of stage, or two times the vertical dimension of the screen, whichever is further
- No more than 14 chairs in center section of seating
- Side sections set herring bone or chevron to provide more direct sight line to speaker and screen
- Two side aisles at least 4 ft/1.2 m wide
- If section exceeds 10 rows, add 2 ft/61 cm to aisle width for a total of 6 ft/1.8 m; if section exceeds 30 rows, aisles should be 8 ft/2.4 m wide
- Best angle for viewing speaker or AV presentation is at 45 degrees or more to stage; at no time should the angle to screen be less than 22 degrees
- Space between adjacent chairs at least 2 in/5 cm, preferably 4-6 in/10-15 cm if chairs not interlocking
- Space between rows of chairs at least 2 ft/61 cm from back of one row to front of the next row

Local fire codes may dictate row lengths, the number of rows in a section and aisle widths. Since each venue has unique fire safety regulations, meeting planners must become familiar with the details for the event's venue.



Classroom or Schoolroom Set-Up: Seating arrangement consisting of tables and chairs facing the front of the room with writing space for each person.



This set-up can be used to accommodate both small and large groups when the session or meeting is more than two hours and taking notes is required. This set-up also provides good sightlines and ample workspace.

If a large room is required for a maximum set-up, group interaction may be limited and people in the back of the room may have difficulty seeing and hearing the presenter.

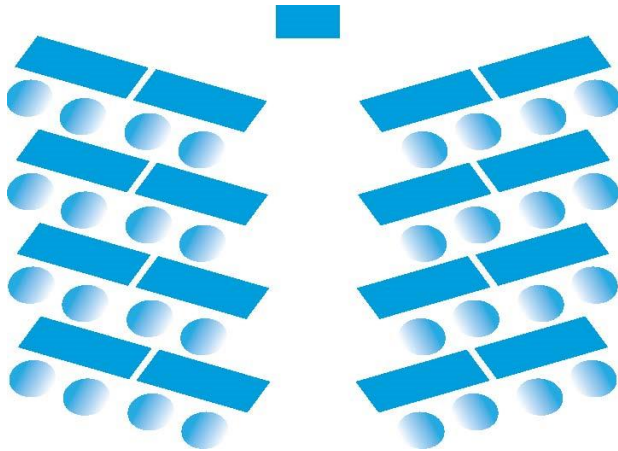
Set-up guidelines to consider:

- Front row of tables at least 6 ft/1.8 m from front of stage, or two times the vertical dimension of the screen, whichever is further
- Tables no less than 18 in/46 cm wide to allow room for water pitchers and taking notes
- Most tables are 6 ft/1.8 m or 8 ft/2.4 m in length
- Space between rows of chairs at least 2.5 ft/61 cm from back of one row to front of next row
- Allow at least 2.5 ft/80 cm of table space per person
- 6 ft/1.8 m table accommodates three, 8 ft/2.4 m table accommodates four people
- If attendees have laptops or large binders, allot 2.5 - 3 feet (80-90 cm) of space to each person; for comfort, no more than 2 people at a 6 ft (1.8 m) table and three people per 8 ft/2.4 m table

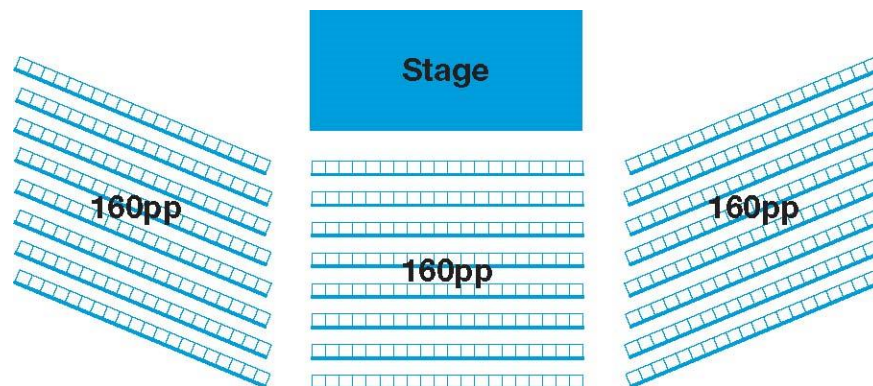
The aisle spacing requirements for classroom and schoolroom set-ups is the same as theater set-up. For large groups, fire codes and building requirements will determine the maximum row lengths, aisle widths and the spacing of chairs.



Chevron (Herringbone) Set-Up: Seating arrangement in which chairs are arranged in rows slanted in a V shape, separated by a center aisle and facing the head table. Used for classroom/schoolroom or theater/auditorium set-ups.



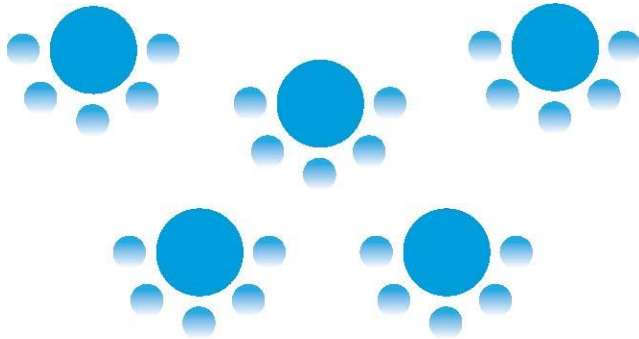
Chevron Classroom Set-Up Diagram



Chevron Theater Set-Up Diagram



Crescent Round Set-Up: Another common set-up for large groups; the crescent or half-round set-up uses 60-, 66- or 72-inch (152-, 168- and 183- centimeter) diameter rounds with seating on two-thirds to three-quarters of the table; the seating is arranged for participants to be seated facing the speaker.



This set-up is generally used for sessions with small group breakouts, large classroom groups, sessions where creativity and/or attendee interaction are primary learning objectives or when a quick turnaround from meal function to working group is needed. It requires more room than a conventional classroom setting.

This set-up also provides good sightlines and room for workbooks or handouts and facilitates community building with small projects or group exercises.

Set-up guidelines to consider:

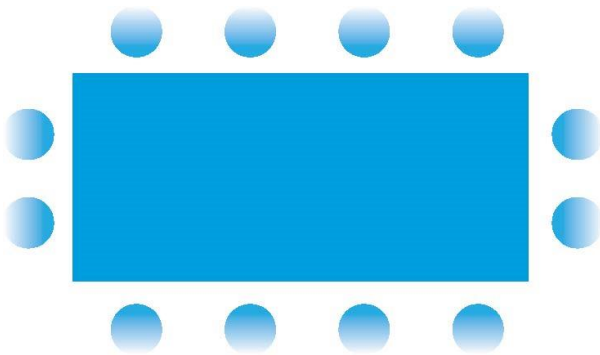
- Round tables measuring 60 in/152 cm, 66 in/168 centimeter or 72 in/183 cm in diameter
- Table seating capacity
- 60 in/152 cm - five people
- 66 in/168 cm - six people
- 72 in/183 cm - seven people
- Chairs set facing head table/screen(s)
- At least 5 ft/1.5 m between tables for seating and aisle space



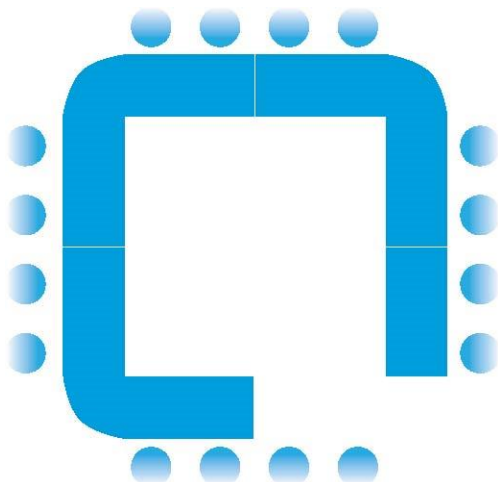
SET-UP CONFIGURATIONS FOR SMALL MEETINGS

The following set ups are used for small groups ranging in size from five to 32 people. They often are used for meetings where the focus is problem solving, a tightly controlled environment is needed or a chairperson is facilitating the meeting. These set-ups provide an environment conducive to participant interaction and help to create a sense of unity and connection among the group, as well as a more formal atmosphere for serious work.

Board Room or Conference Set-Up: Rectangle or oval-shaped tables set with chairs around all sides and ends; often confused with hollow square set-up; preferred industry term is Board Room Set-Up.

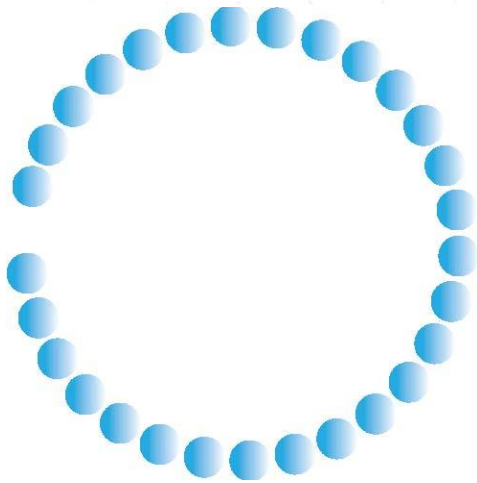


Hollow Square Set-Up: Tables set in a square (or rectangle) shape with chairs placed around the outside of the tables; the center (inside) of the tables is hollow.

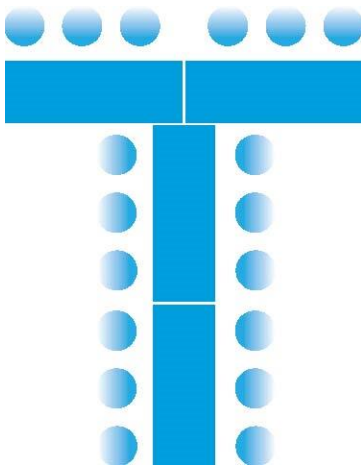




Hollow Circle Set-Up: Tables and/or chairs all facing each other in a single circle.

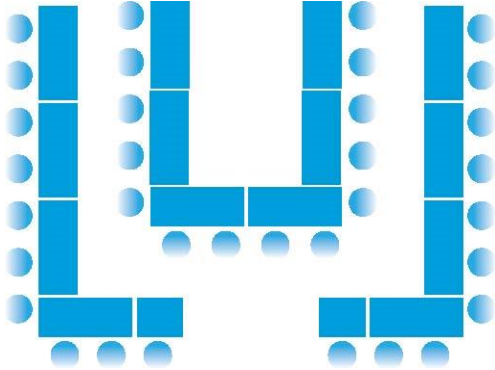


T-Shape Set-Up: Tables set up in the shape of a block T; chairs are set on both sides, except at the head table.





U-Shape/Horseshoe Set Up: Tables set in U shape with chairs placed on outside; chairs can also be placed inside, if needed.





BUDGETING BASICS

Generally, the event budget is created at the same time as the objectives for the program and event.

Budgetary line items may vary among different types of meetings, yet the meeting manager should be aware of the primary revenue and expense line items related to meeting management.

MEETING REVENUE

There are revenue considerations as well. Money can be collected from:

- Registration/Admission fees
- Education fees
- Grants/Contributions
- Exhibition space rental
- Sponsorships
- Advertising

MEETING EXPENSES

Primary sources of expenses can be accounted for in the following areas:

- Marketing
- Speakers
- Staff travel
- Audiovisual
- Computer equipment
- Food and beverage
- Meeting room rental
- Exhibit space rental
- Freight/shipping/supplies
- Security
- First aid
- Signage/graphics
- Insurance
- Registration expense
- Internet and telecommunications
- Electrical and utilities
- Cleaning
- Licenses/fee
- Transportation



MANAGEMENT CONSIDERATIONS

PROJECT MANAGEMENT

Event and meeting managers are often challenged to complete multiple tasks in a specific length of time, and often with limited resources. Project management provides processes to break down the required work into smaller more manageable tasks.

A project plan specifically:

- Defines problem, objective and scope
- Identifies resources needed
- Creates action steps to complete the plan

The project plan establishes the parameters of the project in terms of the:

- Scope or magnitude of the project
- Direct cost of resources needed to complete the project
- Performance or quality of work executed in project completion
- Defined timeline to meet the target date of completion

Like business plans, marketing plans and other “road maps” for organizations, the project plan is presented in a standard format which includes the following elements:

- Problem Statement: Provides focus and clarity to the event/meeting manager’s challenge
- Mission Statement: Delineates required accomplishments for successful project completion
- Objectives (SMART): Defines results required to achieve success
- Work Requirements: Lists deliverables for each stage of the project
- Exiting Criteria: Provides benchmarks used to determine when milestones are achieved
- Specifications: Lists conditions that either must or might be met during the process
- Work Breakdown Structure (WBS): Identifies and displays all project tasks to be completed
- Schedules: Provides key elements of time frames. Schedules can be graphically represented by Gantt charts, Performance Evaluation and Review Technique (PERT) charts and **Critical Path Methodology (CPM)** to determine the longest path through a project that determines its earliest completion date.
- Resources: Lists all human, financial, technical or physical resources
- Control or Monitoring System: Defines how to check the progress of each element
- Key Players: Lists those assigned to specific responsibilities in the schedule of critical tasks
- Risk Factors: Provides parameters for estimates and contingencies



WORKING WITH VENDOR TEAMS

Event professionals must work with a variety of both internal company teams and external company/vendors to design and execute a meeting. This chapter is dedicated to all the teams that might be needed.

ON-SITE TEAM

The core meeting/event management team may range from a single meeting manager/planner for a small, simple event to a large team of people for more complex events like exhibitions and conferences.

Depending upon the type of organization or size of the meeting/event, the number of staff members needed can range from one to dozens. The “face” of an event often consists of the event organization’s team that can include full-time staff, staff of an outsourced meetings management company, temporary workers, volunteers to assist on-site or a combination of full-time and volunteer staff.

It is important to set staff assignments and schedules according to the needs of the event and the skill sets of available workers. It is equally important to properly orient and train on-site staff. Each team member must understand how important their conduct, actions and performance will be to the success of the event.

Event Specifications Guide (ESG)

The **Event Specifications Guide (ESG)** is a comprehensive document that outlines the complete requirements and instructions for an event. It is typically authored by the event planner and shared with the CSM of the meeting facility and all other appropriate vendors to communicate the expectations of services for a project.

The Events Industry Council (EIC) provides an ESG template, which presents all meeting specifications in a standard format to ensure that they are delivered clearly and accurately to the venue(s) and/or suppliers. While every section of the template will not apply to every event, it provides a foundation for what facilities and vendors need from planners to efficiently set up specific events, functions and meetings.

The Event Specification Guide template can be found on the Events Industry Council website at <https://insights.eventscouncil.org/Full-Article/events-industry-council-templates>.

Pre-And Post-Convention Meetings

A vital part of managing meetings on-site is meeting with facility staff and on-site service contractors before, during and after the event.

Pre-Convention Meeting (Pre-Con):

- Meeting at the primary facility at which an event will take place just prior to the event beginning
- Final opportunity to review and reinforce with facility the goal of the meeting
- All logistical details reviewed, and final adjustments made if needed
- Participants generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as



appropriate and contractors

- Another opportunity to review key safety and security measures before the events begins; it is recommended that safety and security issues be discussed in detailed at, and following, the first site visit with all local stakeholders (refer to the CEM workbook on Security, Risk and Crisis Management for details).

Post-Convention Meeting (Post-Con):

- Meeting at the primary facility after the event, involving all participants from the pre-con meeting; participants generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as appropriate and contractors
- Purpose is to evaluate the execution of the project, note elements that exceeded or did not meet expectations, and recognize those who contributed to the success of the meeting
- Provides an opportunity to review accounts payables, statements or invoices with facility personnel on-site, to make the final billing process more efficient by reducing questions and delays
- Additionally, companies can conduct post-con meetings with their staff without vendors to also do a debrief as to what went well, what didn't and what could be improved for the future.

FACILITY PARTNERS

Meeting space is typically negotiated and confirmed by a venue's sales team. Once the contracts or lease agreements are confirmed, the sales team passes on the project to an operations member.

The **Convention Services Manager (CSM)** of a hotel, convention center or convention bureau is the key operations contact for the **meeting planner**. The CSM coordinates the activities of all facility departments and connects with service contractors such as those who provide audiovisual, production and room set-up crews. The CSM also communicates with key facility personnel such as the managers of catering, security and safety, electrical and utilities, engineering and telecommunications.

TECHNOLOGY PARTNERS

Technology now plays a dynamic part in the advancement of meetings, conferences, conventions and exhibitions. New and updated meeting and event management software programs and technology applications are in continuous development and offer innovative features and benefits. Planners, attendees and exhibitors have a large and rapidly growing inventory of creative tools and solutions that are rapidly expanding the face-to-face experience into hybrid versions using webinars, podcasts and a variety of social networking applications.

The following table lists examples of meeting management technology applications and software programs related to meeting management.



Examples of meeting management technology applications and software programs related to meeting management:

Attendance promotion – email and social media marketing
Abstract management – submission, review and display of accepted abstracts
Online Request for Proposal (RFP) submission and site selection
Online registration and attendee management
Online housing reservation systems
Communications and contact management software/systems
Budgeting
Logistical planning and floor plan management tools – food and beverage, audiovisual, room sets, room diagramming, banquet seating, etc.
Project management and scheduling
Mobile apps and Quick Response Codes (QR codes) – interactive information about speakers and sessions, exhibits and other event aspects
Attendee conference planning tools – attendee/exhibitor matching and appointment setting, online communities, private event social networking sites
Recorded or streaming sessions both during and after the event, as well as webinars and podcasts
Attendee interaction tools – audience response and polling systems, interactive systems and online evaluations
RFID technology for tracking session access, attendance and traffic flow
Lead retrieval
Message centers, cyber cafes, product locators and interactive floor plans
Online and computerized continuing education reporting and tracking
Technology devices – smart phones and tablets
Metrics of purchasing behavior, perceptions of pre-, during and post-event value, return on investment (ROI), objectives or engagement

There are many ways to keep up with new technology, such as filtered desktop notifications; customized search engine queries; publications; meetings and events; and talking with vendors, peers and companies that provide technology support.

AUDIO VISUAL PARTNERS

Audio and visual aids are used to support education sessions and presentations as well as other activities. The location of AV equipment and staff must be included in all room set-ups. During the planning of the on-site room assignments, the venue, timing of the sessions and speaker needs should be considered to minimize audiovisual-related costs and effectively utilize technical support staff.

If sessions are offered via streaming video, the Internet, webinars, webcasts, podcasts, on CD or other media, the additional logistics and costs should be considered in the pre-meeting planning.

Services typically provided by an AV contractor include:

- Meeting room AV equipment and labor
- Webcasting and podcasting services
- General session staging
- Audience response systems
- Free-standing audio systems
- Presentation management systems
- Lighting systems and rigging

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- Computer hardware rental
 - Simultaneous interpretation services
 - Design logistics and pre-planning support
 - Video-conference and satellite remote sessions
 - Program capture and archival services
 - Video program production and presentation

PRODUCTION COMPANIES

Management of special events within the meeting program (such as parties, celebrations, entertainment, theatrical acts or awards ceremonies) can be outsourced to companies for either the entire event or only parts of it.

Production companies typically create, design, plan, organize and execute specific events within the meeting program. These can be within the meeting facility or elsewhere, sometimes in unique settings.

The most common use of a production company as part of a meeting is with the creation and execution of a meeting's general session.

FOOD AND BEVERAGE PARTNERS

Food and beverage is a common element of many meetings. There are specific processes and forms to follow to communicate food and beverage needs.

A **Function Set-Up Order** communicates detailed instructions from the event planner to the hotel, venue and other suppliers for a specific function. It includes room set-up instructions, audiovisual and event technology requirements, food and beverage requirements, and other specifications.

If a meeting/event includes food and beverage, the catering department will issue a **Banquet Event Order (BEO)** for each function. This form is used by facilities to provide details to internal personnel concerned with a specific food and beverage function or event room set-up. BEOs are also issued for refreshment breaks, meal functions, and other functions where a specific meeting room has not been assigned.

BEOs and function work orders are usually prepared by the CSM, then reviewed and approved by the planner prior to the meeting to confirm that specified arrangements have been correctly documented. For any change, a new BEO is prepared according to the revised specifications.

An additional review (recap) should occur daily on-site, to ensure that charges are the same as prices quoted in the BEOs and work orders, that quantities served are correct, and that there are no unauthorized additions.

Guarantees

Guarantees are written commitments from the meeting organizer that a minimum number of sleeping rooms, food and beverage or other revenue sources will be used or consumed. Guarantees are part of the formal contract and failure to meet agreed upon numbers can result in financial penalties.

Facilities generally require a food and beverage guarantee to be finalized 48 hours (72 hours if over a weekend or holiday) before the function. Committing to a set number of covers (prepared meals)



is challenging when attendance cannot be defined in advance. Unlike most corporate meetings, where employee attendance is mandatory, not-for-profit meeting participation is voluntary and less predictable.

Large conventions, congresses and exhibitions are particularly challenging in view of the potentially high **attrition** charges that may occur as a result of overestimating the number of attendees at various food functions.

Methods and resources for estimating guarantees accurately include:

Event history: Review all BEOs and recaps, as well as pre-ordered quantities and actual counts; note any anomalies that may have affected prior guarantees, then calculate the averages to determine the estimate.

Attendee profile: The make-up of the group may provide insight; for example, if audience is predominantly female, portion size and/or numbers may be reduced.

Pre-sold tickets and/or ticket exchanges: Selling function tickets or requiring an exchange of ticket in advance provides more accurate counts for guarantees.

Registration process: If meals are included in registration fees, registration numbers can assist in establishing guarantees, even though not all attendees will attend all meal functions; registration forms can include a request to indicate in advance which food functions the registrants plan to attend; the total number of registrants who have picked up credentials or badges on-site can also assist planner in estimating a reasonable no-show factor.

Ticket exchange: Attendees must turn in generic event tickets for an actual meal ticket (and sometimes a seating assignment) by a certain date and time; this usually allows for highly accurate guarantee estimates.

Guarantee to margin: Most facilities prepare three to five percent more covers than guaranteed, known as the margin; subtracting the margin from the minimum guarantee ensures enough covers and lower overage if minimum guarantee is not met; the guarantee may be increased if the final number of covers is provided within a negotiated period – usually 24 hours prior to event.

Food and beverage selection and management is a major component of meeting and event planning and management. In general, people are conscious of their health and well-being and many attendees prefer healthier food and beverage choices. In addition, the types and amount of food consumed by attendees affects learning levels and attention spans during sessions throughout the day.

Basic considerations when organizing group food and beverage functions include recognition of attendee demographics as well as cultural differences and the level of physical activity during the meeting.

Special Meal Accommodations

Requests for special meal accommodations should be identified by the attendee on the registration form, confirmed by event staff on-site and accommodated throughout the event.

Most common reasons for special meal requests are:

Food allergies: Peanuts, shellfish most common; an allergic response to even a tiny amount of food can be potentially life threatening.





Food intolerance: Dairy products, grain products containing gluten (wheat, barley, rye) most common; often confused with food allergy, but less dangerous and confined to digestive system; can be extremely uncomfortable, but not life-threatening.

Religious dietary restrictions: Most common are Jewish Kosher and Muslim Halal dietary restrictions; both religions prohibit pork and require other meat to be slaughtered according to specific, supervised procedures; kosher rules also prohibit shellfish and require dairy and meat items to be separated; observant Muslims do not drink any alcohol; most Hindus do not eat meat, and none eat beef, as the cow is sacred to them; many will choose vegetarian meal options.

Dietary preferences: For health, cultural or lifestyle reasons, some attendees may request that their meals and refreshment breaks accommodate specific diets or regimens, such as vegetarian, vegan, low/no sodium, low carbohydrate, low fat, high protein, etc.

Given the broad variety of preferences among attendees who expect accommodation, it is now common to offer a choice of two or three different entrees at plated meals and buffet menus with not only cross-cultural dishes, but also food items suitable for a range of special dietary requests. All food items should be clearly labeled and identified to alert attendees to potential allergens (i.e. contains peanuts, tree nuts or shellfish) and key characteristics such as vegan, gluten free, halal, kosher, etc. This is especially important when serving meals buffet style. Consultation and coordination between the organizer and the facility's food and beverage manager, cooking staff and serving staff are especially important.

HOUSING PARTNERS

A key aspect of most conferences and meetings is managing housing for attendees. While the CEM Housing and Registration Management course addresses these issues in detail, the subject warrants some discussion here due to its importance.

Attendee and exhibitor profiles compiled in the early planning stages provide important insights for effectively identifying and planning housing needs. Because every event and every hotel are unique, it is important to learn early how the event being planned might fit into a hotel's operations and reservations policies. For negotiation and contracting purposes, it is also important for the event organizer to make realistic estimates.

Reservation Procedures (Hotels)

Direct Reservations: Attendee makes hotel reservations directly with the hotel.

- Advantages - efficient and reduced chances of reservation mistakes
- Disadvantages - meeting planner unable to ascertain who is registered in live time; individuals who wait too long may be unable to secure reservations

Rooming Lists ("In-House"): Electronic or printed roster, with which an event organizer and/or designee (e.g., a housing bureau) periodically convey multiple reservations to a hotel or other housing facility. Attendees reserve directly through the organization's headquarters.

- Advantages - provides the event planning staff with maximum information about who is and who is not registered; beneficial for events that require many **sub-blocks** (room blocks within a block) to accommodate specific categories or groups of attendees



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- Disadvantages - in-house management of housing is labor intensive and can be complex with large groups

Housing Bureau: Organization that manages reservation services for group events. Housing bureaus employ sophisticated call center operations, websites and integrated computer technology that combine to provide efficient processing procedures. Attendees make housing reservations through the housing bureau (online or via telephone), which then transmits the reservation to the hotel. Advantageous for efficiently managing large and very large groups

Room Block Pick-Up Review and Management

Room Block: Total number of sleeping rooms that will be used and attributed to the meeting or event; depending on size of meeting and number of participants, it may be necessary to secure room blocks in more than one hotel; securing an adequate room block is the first step of the housing process.

Room Nights: Total number of rooms occupied over the duration of the event; hotels calculate occupancy in terms of room nights, upon which rates and concessions are often determined; if the event occurs over three nights and attendees occupy 300 rooms each of three nights, that equates to 900 room nights.

Room Pick-Up: Number of sleeping rooms occupied and used by event attendees and exhibitors; must be reviewed regularly to ensure that rooms are being reserved for all nights of the block.

Cut-Off Date: Designated date when a hotel will release any unsold sleeping rooms in a room block and make them available to the general public; this date typically occurs three to four weeks before the event.

Housing management providing real-time reporting and monitoring of room block pick-ups provides data to assist the meeting planner in deciding whether to release rooms from the block.

Attrition: The difference between the actual number of sleeping rooms picked up (or food and beverage revenue) and the number of rooms agreed to in the hotel contract.

Typically, hotels allow a 10 to 15 percent decrease in total estimated room nights before assessing attrition penalties. The terms governing attrition are usually negotiable during contract talks but rarely afterwards. Careful and regular monitoring of room block pick-up and reservations helps to avoid or minimize the attrition penalties and ensures that VIPs, speakers and other key attendees have rooms reserved.

Room Audit: Process to identify attendees who occupy rooms outside the contracted block for an event.

Because of the many ways that participants can secure hotel reservations using the Internet or third-party providers, occupancy records of the meeting planner and those of the hotel are often misaligned. Comparing the organization's reservations data against that of the hotel ensures that the group receives proper credit for all rooms occupied in connection with the event. Correcting any discrepancies can reduce the organization's exposure to attrition penalties.

REGISTRATION

The registration process for attendees, guests and exhibitors may be outsourced or handled in-house, depending on the size of the meeting, available resources (human and technological) and other priorities



of the organizer. The on-site team consists of the following workers:

A **registrar** is the person in charge of operations and all aspects of registration which includes:

- Set-up
- Training of regular and temporary staff
- Daily management of the registration process
- Supervision of on-site team consisting of registration contractor's personnel, temporary workers or volunteers, meeting planner and/or manager

A **registration coordinator/manager** is the liaison between event staff and registration staff.

Temporary workers, which are also referred to as temps, are used for registration, information counters and similar duties. They are provided free or hired by a Destination Marketing Organization (DMO), Destination Management Company (DMC) or a local agency and may assist with data entry and serve as cashiers or badge checkers.

TRAVEL AND TRANSPORTATION MANAGEMENT

The most commonly used modes of travel to an event are air and ground transportation. Depending on the size and nature of an event, an organizer may subcontract transportation needs to a third-party travel management company or a DMC or choose to handle transportation in-house. Regardless of how the transportation needs of participants are managed, travel management should be part of the overall event planning strategy. Attending to travel and transportation needs for the event, such as housing, begins during the initial planning stages.

Attendee and exhibit profiles compiled in the early planning stages provide insight for planning and identifying the travel needs of participants and arranging group discounts for air, rail or other forms of travel. Factors such as **airlift** or the number of available airline seats to and from a destination can affect attendance materially.

Arranging group fares with an airline may have advantages. As with housing, accurate event histories are key to negotiating favorable fares. Presenting accurate data facilitates negotiations and provides evidence of the number of air travelers, their home cities and their lengths of stay at the event. If the destination is a central location to most attendees, ground transportation, such as rail or personal automobile, may be the preferred method of travel.

Determining on-site transportation needs should begin during the site selection process. Knowing the distances attendees will have to travel to and from the airport, other transportation portals or from hotels to the facility are key factors in choosing a site.

Event ground transportation usually involves moving attendees to and from the hotel(s) to the event facility. Other issues might include airport transportation, shuttle services, tours and partner programs and special event transportation.

On-Site Transportation Considerations

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Event ground transportation usually involves moving attendees to and from the hotel(s) to the event facility. Other issues might include airport transportation, shuttle services, tours and partner programs and special event transportation.

Airport transportation: Attendees should be provided with information about transportation options from the airport(s) to the event venue, such as taxis, shared shuttle services, car and limousine services, train, underground or light rail service

Shuttle services: Shuttle buses/transportation are often provided to and from the airport to hotels and from hotels to the event facility

Tours and partner programs: Programs and events designed for accompanying persons

Special event transportation: Considerations regarding transportation to special events if they are off site

In the U.S., all transportation options must be ADA compliant. This should be a contractual requirement for all transportation providers. Public transportation facilities are already required by law to be ADA compliant.

INTERNATIONAL ATTENDANCE

The meetings/events/exhibitions industry is global. Buyers and sellers from dozens of nations commonly attend important international congresses and exhibitions. Exhibitions and events in the U.S. benefit significantly from the presence of foreign nationals. In some markets, their participation is essential. Any obstacles that hinder the participation of foreign nationals in U.S. events can be very costly.

Organizers of events with significant numbers of international visitors often provide services to assist them, such as language translation services, international lounges/service centers staffed with multi-lingual personnel and travel planning experts

A visa is a permit, recorded in a passport, to enter a country for a specific purpose and length of time. Visas are required for many international attendees of U.S. events and exhibitions.

The **U.S. Visa Waiver Program (VWP)** enables nationals of certain countries to travel to the U.S. for tourism or business for stays of 90 days or less without obtaining a visa. Similarly, U.S. nationals traveling to a Visa Waiver participating nation are not required to secure visas.

Organizers should have a clearly stated policy addressing refunds for registration and/or exhibit fees should an applicant's visa application be rejected. It is especially important to ensure that exhibitors and their personnel submit their visa applications early to avoid booth cancellations.

For more information on the program, including the current list of visa waiver approved countries, visit: <https://travel.state.gov/content/visas/en.html>.

SPECIAL CONSIDERATIONS

There are many special considerations when organizing a meeting that should be part of your overall event strategy. These items include sustainability initiatives and diversity/equity.

PLANNING SUSTAINABLE MEETINGS, EVENTS AND EXHIBITIONS

Formerly known as the APEX/ASTM Environmentally Sustainable Meeting Standards, the current Events Industry Council Sustainable Event Standards is a compilation of separate industry standards related to improving the environmental and social impact of events.

(<https://insights.eventscouncil.org/Sustainability/Sustainability-Standards-and-Registry>)



The standards cover the following sectors of event management:

- Audiovisual/Production
- Accommodations
- Communications
- Destination Selection
- Exhibits
- Food and Beverage
- Meeting Venue
- On-Site Office
- Transportation

Following are some industry accepted practices to make a meeting or exhibition/event environmentally friendly:

- Use of china or glass instead of disposable tableware; if plastic serving pieces are used, they must be washable, biodegradable or compostable; styrofoam under any circumstance is not acceptable
- Serving condiments in bulk containers, not in individual servings to save packaging
- Use of cloth napkins whenever possible and coasters instead of cocktail napkins
- Dispensing water from pitchers or water coolers, not plastic bottles
- Providing separate recycling bins for attendees to use at all catered functions, registration and, especially, on the exhibit floor
- Printing handouts on two sides, using post-consumer recycled paper and soy-based inks

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- Making promotional products, such as pens and bags, from recycled content or purchasing eco-friendly materials (e.g., registration bags made from cotton or hemp)
 - Providing bins for re-use of badges and lanyards at future meetings and recycling bins for the disposal of all recyclable items
 - Requesting that hotels not change sheets and towels daily unless requested by the guest
 - Requesting that hotels not replace the amenities daily unless used by the attendee; use of soap and shampoo dispensers would be optimal
 - Requesting that hotel housekeeping staff close blinds and turn off the heat/air conditioning during the day in sleeping rooms while attendees are elsewhere
 - Providing information about the facility's recycling program for all areas
 - Donating all leftover food to a local food bank using accepted local Board of Health guidelines
 - Reducing the number of handouts and/or making them available on the event's website or providing them in digital formats
 - Reducing the size of marketing materials; providing this content online where possible
 - Promoting badge pick-up on-site rather than mailing them in advance

The International Association of Exhibitions and Events® (IAEE) strives to educate and influence its member organizations about ways in which they can achieve their financial and strategic goals in sustainable ways. IAEE has identified resources and accepted practices that address ways to minimize the environmental impact of events globally. These documents serve as references to develop comprehensive resources that assist exhibitions and event organizers and suppliers to the industry to create more sustainable events. (<https://www.iaee.com/>)

MUSIC LICENSING

In many countries, the works (intellectual property) of composers, songwriters and performers are protected by copyrights. The right to use or perform their music is controlled by copyright laws. If music is to be used (recorded) or performed (live) at an event, the organizer of the event is required to secure a music license, which is a legal right granted by one party that allows another party to use live or recorded music. The license stipulates certain agreements and contains fee schedules. Music that has reverted to the public domain and that is not subject to music licensing are national anthems, folk songs and older music standards. Music libraries are also available from which selections can be played without the purchase of a music license. However, most contemporary music almost is certain to be covered by one of the music licenses provided by music licensing organizations.

There are three licensing agencies in the United States. Each has a distinctive library of copyrighted music. They are:

1. The American Society of Composers, Authors and Publishers (ASCAP), www.ascap.com
2. Broadcast Music, Incorporated (BMI), www.bmi.com
3. SESAC, www.seasac.com

All three maintain online searchable libraries of music works. For events organized outside of the United States, it is advisable to check local authorities to determine to whom payment should be made for music licensing fees or royalties.



DIVERSITY

As an event professional, it is important to value diversity and inclusiveness. Events should provide opportunities to all persons who wish to participate in the activities without regard, including but not limited to age, color, disability, family responsibility, gender, gender identity, national origin, political affiliation, race, religion or sexual orientation.

Event professionals should recognize their responsibility to provide resources and support to achieve this goal. It is important to create an event environment that allows all people the opportunity to reach their full potential in the pursuit of their personal and business objectives.

There are also opportunities to involve the community and create give-back programs. From food donation, floral donations, charity fundraisers and more. Consider incorporating some sort of a community program within an event.

ADA CONSIDERATIONS

The Americans with Disabilities Act (ADA) outlines accommodations required by law in the U.S. only. While other countries may not have similar regulations, the ADA has served as a model for many other nations, many of whom have adopted similar legislative requirements. Regardless of their home country, organizers who implement meetings, events and exhibitions in the U.S. should be aware of ADA requirements and comply accordingly.

Meeting room set-ups are one of many event components that require planning and forethought to adequately accommodate attendees who may have mobility, sight, hearing and other challenges affecting their ability to participate as fully as possible in all aspects of a meeting or exhibition.

The **Americans with Disabilities Act (ADA)** is U.S. legislation that requires places of public accommodation to meet minimum standards to make their facilities accessible to individuals with disabilities. This includes buildings such as offices, hotels, convention centers and restaurants. The law contains four major sections that address employment, public accommodations, public services, transportation and telecommunications.

Preparing to properly serve persons with disabilities requires planning and forethought. The ADA provides important requirements defining how planners and others can make their events accessible to the broadest and most diverse audiences possible.

It is important for meeting and event managers to comply in all respects with the provisions of the ADA while also viewing the act as an opportunity to extend the reach of their events to all audiences.

The IAEE Publication *Americans With Disabilities Act – What Exhibition and Event Planners Must Know – Executive Summary* (<https://www.iaee.com/wp-content/uploads/2016/05/ADA.pdf>) includes the following rules to ensure compliance:

- Registration forms should solicit “special needs.”
- Planners must distinguish between mobility, visual and hearing accessibilities.
- Hotel registration forms should include a barrier-free room category.
- Hotel and facility contracts should include an ADA compliance clause.
- RFPs and event specification forms should include an ADA compliance clause.

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- Meeting rooms should be centrally located.
 - Door openings must be a minimum of 32 in/81.28 cm wide.
 - Doorway thresholds must not be more than 0.5 in/1.27 cm high.
 - Floor coverings must be non-slip.
 - Hallways must be at least 36 in/91.44 cm wide.

More detailed information about ADA regulations and compliance can be found at [The Americans with Disabilities Act \(www.ada.gov\)](http://www.ada.gov) and [Americans with Disabilities Act | U.S. Department of Labor \(www.dol.gov\)](http://www.dol.gov).



KEY TERMS

The following key terms are identified in this workbook by bold face type and accompanied by a definition. Those noted with an asterisk (*) are from the *Events Industry Glossary* developed by the Events Industry Council (<https://insights.eventscouncil.org/Industry-glossary>).

Adult Learner - Any person socially accepted as an adult who is in a learning process, either formal education, informal learning or corporate-sponsored learning.

Airlift - The total number of airline seats into and from a destination.

Americans with Disabilities Act (ADA) - Passed by Congress in 1990, the Americans with Disabilities Act (ADA) is the nation's first comprehensive civil rights law addressing the needs of people with disabilities, prohibiting discrimination in employment, public services, public accommodations, and telecommunications.

Andragogy* - The art and science of helping adults learn as opposed to pedagogy, which is the science of helping children learn.

Annual Membership Business Meeting - A meeting legally required to be held by an association or corporation in accordance with a provision in their bylaws

Attrition* - *The difference between the actual number of sleeping rooms picked-up (or food-and-beverage covers or revenue projections) and the number or formulas agreed to in the terms of the facility's contract. Usually there is an allowable shortfall before damages are assessed.

Audiovisual (A/V)* - Equipment, materials and teaching aides used in sound and visual presentations, such as video projection, monitors, sound equipment, etc.

Banquet Event Order* - BEO. A form most often used by hotels to provide details to personnel concerned with a specific food and beverage function or event room set- up.

Board of Directors Meeting* - Meeting of the governing body of an organization.

Board Room or Conference Set-Up* - A seating arrangement in which rectangle or oval shaped tables are set up with chairs on both sides and ends.

Break-Out Sessions* - Small group sessions, panels, workshops or presentations, offered concurrently within an event. Break-out sessions occur apart from the general session.

Chevron (Herringbone) Set-Up - Seating arrangement in which chairs arranged in rows slanted in a V shape, separated by a center aisle and facing the head table. Used for classroom/schoolroom or theater/auditorium set-ups.

Classroom or Schoolroom Set-Up* - A seating arrangement in which rows of tables with chairs face the front of a room and each person has a space for writing.

Committee Meetings - Appointed members meet to pursue an agenda with goals and objectives.

Concurrent Sessions* - Multiple sessions scheduled at the same time. Programs on different themes



or subjects are offered simultaneously.

Conference* - 1) A participatory meeting designed for discussion, fact-finding, problem solving and consultation. 2) An event used by any organisation to meet and exchange views, convey a message, open a debate, or give publicity to some area of opinion on a specific issue. No tradition, continuity or timing is required to convene a conference. Conferences are usually of short duration with specific objectives and are generally on a smaller scale than congresses or conventions.

Congress* - The regular coming together of large groups of individuals, generally to discuss a specific subject. A congress will often last several days and has several simultaneous sessions. The length of time between congresses is usually annual. Meeting of an association of delegates or representatives from constituent organizations; European term for convention.

Continuing Education* - Structured educational and training experiences for personal or professional development.

Continuing Education Credit (CEC)* - A requirement of many professional groups by which members must certify participation in formal educational programs designed to maintain their level of ability beyond their original certification date

Continuing Education Unit (CEU)* - Non-academic credit unit conferred by professional organizations for formal educational programs for members who must maintain their level of professional education.

Convention* - Gathering of delegates, representatives or members of a membership or industry organization convened for a common purpose. Common features include educational sessions, committee meetings, social functions, and meetings to conduct the governance business of the organization. Conventions are typically recurring events with specific, established timing.

Convention Services Manager (CSM)* - Professional at a hotel, convention center or convention bureau who is responsible for event operations management on all levels.

Crescent-Round Set-Up* - Seating at round tables with chairs placed at two-thirds to three-quarters of the table and no seating with backs to the speaker. Used for banquet-to-meeting or meeting-to-banquet quick set.

Critical Path – The longest sequence of activities in a project plan which must be completed on time for the project to complete on time.

Cut-Off Date* - *Designated date when a hotel will release any unsold sleeping rooms in a group block and make them available to the general public. The date is typically three to four weeks before the event.

Distance Learning* - Education delivered through a variety of technological and communication methods, including, but not limited to, email, e-learning programs, web conferencing, mobile apps and podcasts.

E-learning - The use of an electronically based network or Internet technology to design, deliver, select and extend learning. Included in this category are TV and satellite broadcasts, Internet-delivered video-on-demand/webinars, audio-on-demand/ podcasts, and any other computer-based forms of learning and training. Also known as Virtual Learning.



Evaluation* - 1) Critiquing and rating the overall success of an event, or a part of an event. 2) A systematic process to determine the value of an activity.

Event Specifications Guide (ESG)* - The preferred term for a comprehensive document that outlines the complete requirements and instructions for an event. This document is typically authored by the event planner and is shared with all appropriate vendors as a vehicle to communicate the expectations of services for a project. Sometimes called staging guide or RÉSUMÉ.

Exhibition* - An event at which products, services or promotional materials are displayed to attendees visiting exhibits on the show floor. These events focus primarily on business-to-business B2B relationships.

Exhibitor Advisory Committee* - Representatives of an event's exhibiting companies who act as advisors to show management on procedures, the needs of exhibitors, and provide feedback for marketing and growing the show.

Formative Evaluation - An evaluation made during an event or project.

Function Set-Up Order - Communicates detailed instructions from the event planner to the hotel, venue and other suppliers for a specific function; includes room set-up instructions, audiovisual and event technology requirements, food and beverage requirements, and other specifications.

General Session* - A meeting open to all those in attendance at an event. Also known as Plenary Session.

Guarantee* - A promise of commitment to provide a minimum number of sleeping rooms, food and beverage (F&B) or other revenue. Usually, there is financial liability if the commitment is not met.

Hollow Circle Set-Up - Tables and/or chairs all facing each other in a single circle.

Hollow Square Set-Up* - Seating arrangement of tables set in a square (or rectangle) with chairs placed around the outside of the table. Center (inside) table is hollow.

Housing Bureau* - Organization that provides reservation services for a group and its attendees.

Learner Centered Instruction - Teaching methodology focusing on the participant's needs, interests, and abilities.

Learning Objectives - Clearly state the results the learner is expected to gain from the education program, such as specific knowledge and skills. They are set within the context of the overall program objectives, with which they should be consistent.

Lecture* - Informative and educational presentation to an audience.

Meeting* - An event where the primary activity of the attendees is to attend educational sessions, participate in discussions or social functions, or attend other organized events. There is no exhibit component.

Meeting Management Company* - A company, representing another organization, handling site selection, negotiations and turnkey support for an event.



Meeting Manager or Meeting Planner* - Person who oversees and arranges every aspect of an event. Can be an employee of the organization or a third-party contractor.

Meeting Objective* - Defines the desired result. It is a formalized statement of outcomes to be anticipated as a result of holding the meeting or educational program.

Needs Assessment - A systematic approach to gather and analyze data to determine and address needs, or "gaps," between current conditions and desired conditions.

Plenary Session* - General session for all participants.

Post-Con Meeting* - Meeting at the primary facility at which an event occurred just after it has ended. Attendees generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as appropriate, and contractors.

Pre-Con Meeting* - Meeting at the primary facility at which an event will take place just prior to the event beginning. Attendees generally include the primary event organizer, representatives of the event organizer/host organization, department heads at the facility, other facility staff as appropriate, and contractors.

Program Objective - Clear statement(s) of anticipated results.

Projection Distance* - Measurement from the projector to the screen.

Registrar* - Individual responsible for handling registrations.

Registration Coordinator/Manager - Liaison between event staff and registration staff.

Room Audit* - A process to identify attendees who occupy rooms outside the contracted room block for an event.

Room Block* - Total number of sleeping rooms that are utilized and attributable to one event.

Rooming List* - A list, whether printed or electronic, by which an event organizer and/or their designates (e.g., a housing bureau) delivers multiple reservations to a hotel or other housing facility. Often the information contained in a rooming list is originally gathered through attendees' completed housing forms.

Room Nights* - Number of sleeping rooms blocked or occupied multiplied by number of nights each room is reserved or occupied.

Room Pick-Up* - The number of sleeping rooms actually used by event attendees and exhibitors.

Seminar* - 1) Lecture and dialogue allowing participants to share experiences in a specific field under the guidance of an expert discussion leader. 2) A meeting or series of meetings of a small group of specialists who have different skills but have a specific common interest and come together for training or learning purposes.

SMART Objectives - An acronym for a process of setting specific, measurable, achievable, realistic and timed goals.





Speaker* - 1) Presenter of a program. Types of speakers include keynote, general session, seminar leader, trainer, workshop leader and “change of pace” speakers such as humorists and entertainers. 2) Device for sound output.

Speaker Ready Room* - An area set aside for speakers to meet, relax, test AV or prepare prior to or between speeches.

Speaker’s Guidelines - 1) Instructions regarding the specific expectations for a speaker at an event. Usually outlined are the required format for presentations, AV request procedures, travel and accommodations instructions, etc. 2) Instructions regarding the required format to be used for the written preparation of a speech.

Special Event* - A one-time event staged for the purpose of celebration; unique activity.

Sub-Block* - Any group of rooms that is classified or separated differently than the general attendee block within the Event-Contracted Block (ECB).

Special Needs* - Any physical or mental consideration that requires accommodations to ensure an event’s physical space, technologies, and food and beverage accommodates those individual needs. Special needs can include food allergies, mobility device access, signing interpreters, etc.

Summative Evaluation - Often called the post-show analysis, it is a process that involves an in-depth look at all aspects of planning and production after an event’s completion.

Temp* - A temporary worker used for registration and other duties.

Theater (Auditorium) Set Up* - A seating arrangement in which seats are in rows facing the stage area with no tables.

Training Session - A structured learning session in which an instructor presents specific information and techniques.

T-Shape Set-Up* - A series of tables set up in the shape of the letter T with chairs set all around except at the head table.

U-Shape or Horseshoe Set-Up* - A series of tables set up in the shape of the letter U with chairs set all around on one or both sides.

U.S. Visa Waiver Program (VWP) - Enables nationals of certain countries to travel to the U.S. for tourism or business for stays of 90 days or less without obtaining a visa; similarly, U.S. nationals traveling to a Visa Waiver participating nation are not required to secure visas.

Visual Aid* - Materials used in a presentation to give a visual image that will help clarify or demonstrate a point to the audience.

Workshop* - 1) Meeting of several persons for intensive discussion. The workshop concept has been developed to compensate for diverging views in a specific discipline or on a particular subject. 2) Informal and public session of free discussion organized to take place between formal plenary sessions or commissions of a congress or of a conference, either on a subject chosen by the participants themselves or else on a special problem suggested by the organizers. 3) Training session in which participants, often



through exercises, develop skills and knowledge in a given field.