

What Do Professional Conference Planners Consider the Most Important Elements for Continuing Professional Education Conference Planning?

by

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Executive Summary

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Contents

Abstract	3
Statement of the Problem.....	4
Purpose of the Study.....	4
Research Questions.....	4
CPE is Big Business for Associations	4
Adult Education Planning Models.....	5
Association and Trade Association Insights	5
Participants	6
Method	6
Findings.....	6
Limitations	7
The Association Conference Planning Model [®]	7
Recommendations for Further Research	9
Summary	11
Selected Bibliography.....	11

Abstract

Many adults attend and rely on continuing professional education (CPE) throughout their careers, and CPE is big business for associations. One way associations deliver CPE is through educational conferences. While adult education theories and frameworks offer developmental and operational guidance and advice, there is little practice data to understand what meeting planning professionals actually do as they implement adult education conferences in practice.

The purpose of this study was to identify the elements that practicing meeting planning professionals in associations utilize in CPE conference planning and which elements are considered the most important. This study accessed a senior group of association planners who held the CMP and/or CMM certifications, credentials offered by meeting planning industry associations. In all, 40 participants with a cumulative 784 years of experience, a mean of slightly more than 18 years each, participated in eight, online focus group discussions following identical questioning routes.

While scholarly adult education program planning models offer guidance to association CPE program planners, is not known what, if any, of that guidance is actually used in practice, or if there are other elements that don't appear among the models. This study asked current practitioners what they considered the most important elements and they identified 181 among all eight focus group discussions. Applying a grounded theory approach, these 181 were reduced to 23 individual elements which fell into three categories: CPE-related elements, business-related elements, and a stand-alone element called venue. When compared with the ten models from the literature six elements were strongly supported, eight elements were supported, and nine elements were new.

The order of the elements as numbered in the following lists implies the strength of the element as it emerged during analysis. The following CPE-elements were strongly supported in the literature (1) goals and objectives, (2) program design, (3) needs assessment, and (5) evaluation. These elements were supported in the literature (4) target audience, (7) member benefits / mission, and (8) adult education. These elements were not supported (6) engagement, and (9) accreditation. Only one business-related element was strongly supported in the literature and that was (I) budget. The following business elements were supported in the literature (II) marketing, (III) logistics, (IV) exhibitors, (X) staffing and volunteers, and (XI) return on investment. These elements were not supported: (V) technology, (VI) research, (VII) vendors and negotiation, (VIII) contingency, (IX) greening events, (XII) corporate social responsibility, and (XIII) international attendees. The overarching category of venue was supported in the literature. The three most important elements were (1) goals and objectives, (I) budget, and venue.

The literature review also included issues of change, diffusion of innovations and association literature derived information on strategic planning in associations. Findings supported the idea that change, in and of itself, had an impact as expressed by participants and technological change itself may have influenced the identification of a number of elements not represented in the literature. Additionally, the element identifying mission, had support in the association literature.

This project studied actual practice to understand it better in light of the literature of adult education program models. The subject pool was very narrow and the results of this research cannot be generalized. The findings, while partially represented in the literature, fit no single previous model. The most important implications of this study may be to provide insight into adult education in CPE association conference application. There is very little data on continuing professional education in the arena of CPE as practiced in associations, but such

practice involves the continuing education of a very large number of adults and represents big business for associations.

Statement of the Problem

Many adults attend and rely on continuing professional education throughout their careers, and CPE is big business for associations. One way associations deliver CPE is through educational conferences. While adult education theories and frameworks offer developmental and operational guidance and advice, there is little practice data to understand what meeting planning professionals actually do as they plan and implement CPE adult education conferences in practice.

Purpose of the Study

The purpose of the study is to identify the elements that practicing meeting planning professionals in associations utilize in CPE conference planning. Further, this study is interested in which are considered the most important elements.

Research Questions

All of this leads to the formulation of three research questions to guide the review of literature and proposed qualitative methodology. The first question seeks to collect a list of the elements that are considered or utilized. The second research question will address a rank-ordering of the elements. The third seeks the three most critical planning elements for a successful conference. The research questions are:

- What program planning elements do meeting planning professionals consider in their process of creating and delivering a continuing professional education conference?
- What do these meeting planning professionals consider the most important elements?
- Of all the program planning elements listed and ranked, which three do meeting planning professionals concur are the most important for a successful conference?

CPE is Big Business for Associations

No one knows how much continuing professional education is conducted in the United States each year. CPE is offered on a continuum from journal articles to non-credit courses to large multi-day conferences with perhaps hundreds of sessions from which to choose. Virtual conferences, offered online, offer yet a new phenomenon, and new competition to the traditional conference. However, there is no question that continuing professional education is big business. According to Milam, "There is no national statistical portrait of the impact of non-credit courses in the United States" (2005, p. 57). Since there is very little comprehensive data about CPE, let us utilize some industry and United States Census data to provide some insight into association conferencing, the focus of this study.

CPE in the form of conferences is big business, attracting a vast number of participants annually. According to Durso (2009), the International Congress & Convention Association (ICCA) identified 7,475 international meetings occurring in 2008 and of those, the United States hosted the most with 507 international meetings (pp. 30, 43). United States Census data indicate that in 2002 (the most recent census data available) there were 24,910 associations of the type described in this study with average receipts of \$29.6 billion in revenue (U.S. Census Bureau, 2004). If even one tenth of this is for CPE, then it is big business and must, since a large percentage of revenue is likely registration fees, serve an enormous adult education population.

Cervero (1988, p. 21) estimated that professionals numbered 27% of the workforce using 1986 census figures. Census data for 2002 (updated data are not yet available) indicates that there are almost 25,000 establishments whose definition would fall into the association / professional association descriptors addressed in this study.

This study further addressed only live, on-site, and in-person continuing education in the form of conferences of one or more days in length. These programs are generally held at a contracted venue such as a hotel, conference or convention center and may attract from below one hundred to thousands of participants. It is assumed that a registration fee is charged for attendance and that these educational projects represent both a sizable investment as well as important return on that investment (ROI) for the sponsoring professional association. Professional associations are likely to consider such education events as major annual income sources in support of the association. As such, they carry a sizeable financial risk both in commitment (in terms of hotel and other contracts, as well as advance marketing costs), and for what residual funds generated may mean to the bottom line of the association. Continuing education is thus both high risk and a major income source for an association.

Adult Education Planning Models

Most of the professional writing concerning conference-delivered adult continuing education, whether sponsored by colleges or universities, professional associations, or some other sponsoring body, was written around the 1970's or 1980's (Boone, 1985; Cervero, 1988; Gessner, 1987; Houle, 1980; Langenbach, 1988; Nadler & Nadler, 1977, 1987; Nowlen, 1988; Simerly, 1987). The two most important exceptions to this are Continuing Professional Education in Transition (Young, 1998), and Planning Programs for Adult Learners (Caffarella, 2002). This does not mean that there has been any reduction in conference planning by associations. What this suggests is that perhaps the planning patterns and formulas generated with the first conferences offered by an association have endured, and endured may be a very descriptive word. The fact may be that "...roles and behaviors [have] readily become traditional and change ... is limited" and "what is past is prologue certainly applies to conferences which are conducted by membership organizations" (Nadler & Nadler, 1977, p. 23). How does practice compare with the adult education theoretical planning models and what does this mean about how associations bring good adult education practice to the table?

Association and Trade Association Insights

The literature review addressed a number of other insights that may inform practice but are too lengthy and detailed to be included in this summary. Yet, this summary would be amiss if it did not reference the research report, *7 Measures of Success: What Remarkable Associations Do That Others Don't* (ASAE and The Center for Association Research, 2006). This study revealed, as in the title, seven measures that can help associations be successful. While this study looked at associations and not at their conferences, per se, two of the seven related directly to the findings of this study. These were *alignment of products and services with mission*, and *dialogue and engagement*.

A second item that should be mentioned, though the content was not addressed in the research report, was the new *Meetings and Business Event Competency Standards* (MBECS) (Canadian Tourism Human Resource Council, 2011) released as this research was coming to a close. This report is an important one for the industry and one of the recommendations for further research suggests that the results of this study be compared with the MBECS.

Participants

The purposeful sample was limited to professional meeting planners holding the CMP or CMM credential with experience in association meeting planning. It was also limited to those who were members of Meeting Professionals International, a group with a membership around 25,000. Further limiting the study was the exclusion of planners who do not live in the United States and who plan for conference with registrations of at least 250 attendees. Those conferences could include global audiences.

This research involved 40 individuals participating in eight, online focus group discussions held from June 22, 2011, through August 24, 2011. Participants were recruited from Meeting Professionals International, as the researcher had access as part of her membership. All participants were association type planners who held the CMP and/or the CMM designation and who planned meetings for an audience of at least 250 participants. All were United States residents. This group had a collective 734 years of experience; it was a very experienced group of meeting professionals.

Method

Each focus group was one hour long and conducted online using the web-based program, GoToMeeting. As an incentive as well as a tool for the research, participants were provided a headset with boom microphone which was mailed to them and tested with GoToMeeting. Participants were emailed a semantic differential survey and the discussion questions about three working days prior to the discussion. Each focus group was about one hour in long and participants were asked to log on 10 minutes prior to the actual start time to both be prepared and to solve any last minute technical problems. A Power Point presentation was used on the shared screen to guide the discussion.

Data collected included transcripts of the full discussion, typed by a trained transcriptionist during the discussion, recordings of the shared GoToMeeting screen along with the discussion itself, and a spreadsheet listing elements identified during the discussion. This spreadsheet was shared with participants online and in real time as a means to help them focus on rating each element on a scale of most important, moderately important, or least important.

Data were analyzed using the constant comparative method employing grounded theory in a constructivist orientation. The purpose was to identify all elements rather than judge the quality of any one element, or eliminate one in favor of another. The goal was to discover what practicing meeting planning professionals were actually doing.

Findings

In all 181 elements (many of these were duplicates from the group to group transcripts) were identified and when analyzed, were sorted into three overarching categories. Of these, the most important elements overall were Goals & Objectives, Budget, and Venue.

CPE Elements		Business Elements		Venue
1	Goals & Objectives	I	Budget	Stands alone
2	Program Design	II	Marketing	
3	Needs Assessment	III	Logistics	
4	Target Audience / Generations	IV	Exhibitors	
5	Evaluation	V	Technology	
6	Engagement	VI	Research	
7	Member Benefits / Mission	VII	Vendors / Negotiation	
8	Adult Education	VIII	Contingency	
9	Accreditation	IX	Green	
		X	Staffing / Volunteers	
		XI	Return on Investment	
		XII	Corporate Social Responsibility	
		XIII	International Attendees	

Of the 181 elements 48% were found to be most important, 38% moderately important and 14% least important, with 10% of the items disputed, that is, not everyone agreed on the importance so two ratings were noted. When compared to the ten adult education planning models reviewed for this study, six of these elements were strongly supported in the literature, eight were supported, and nine elements were new.

Limitations

This study had a very small sample and it was qualitative research. As such, it sought to identify ideas, not judge the quality of any one idea. This study cannot be generalized to other situations or groups.

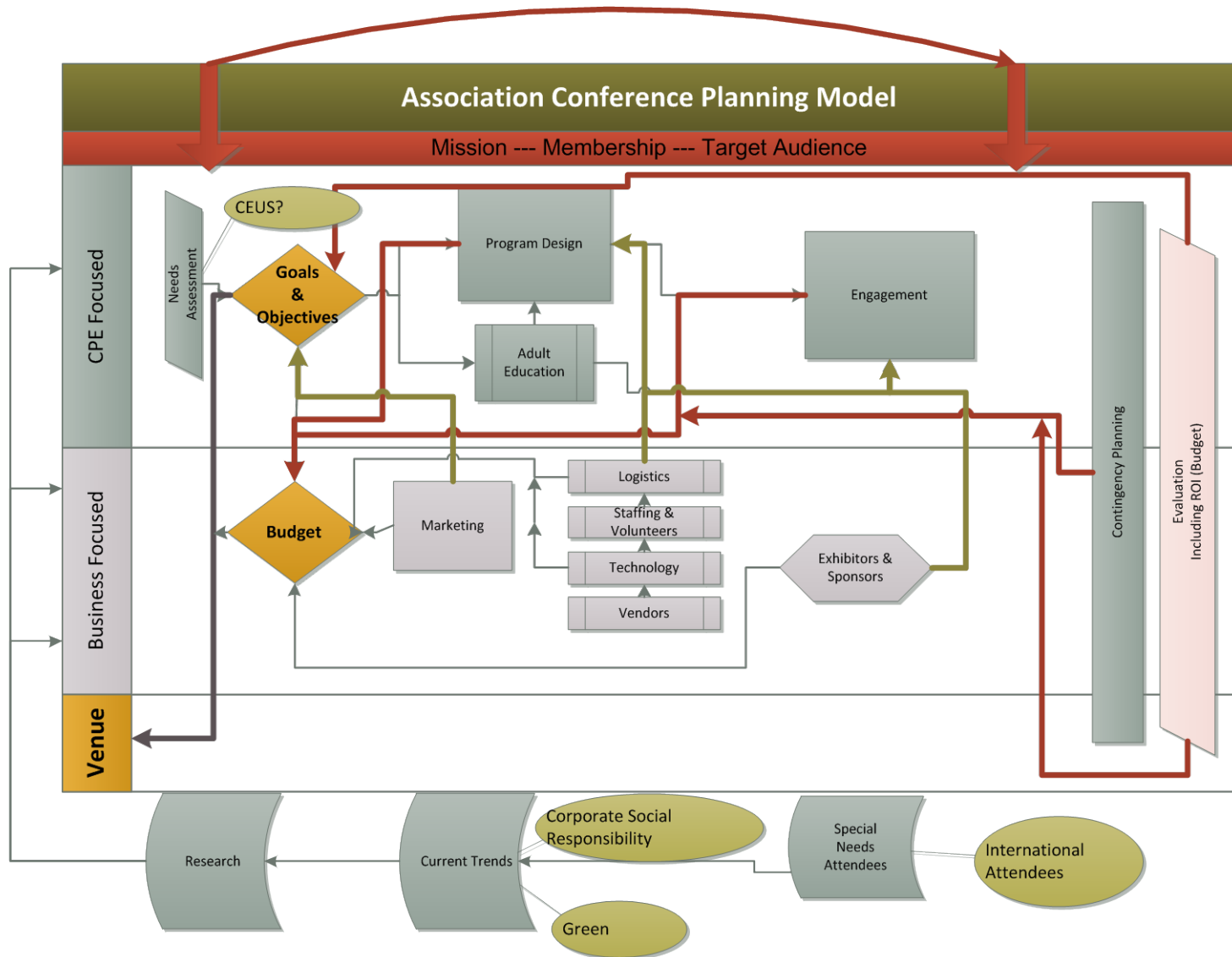
The Association Conference Planning Model[®]

However, combined with the practice experience of the researcher, a model was constructed to help explain the findings. The elements reported above were ordered in the findings according to the strength of their identification among the focus groups. The research did not seek to determine an order to practice. The ordering and relationships indicated in this model include all of the elements included in the findings, ordered by the practice experience of the writer. It should be considered a simplification of a complex planning process.

This model has a definite order; it is a linear model with a beginning and end. Conference projects do indeed have a beginning and end. Additionally, some things have to be decided before other things but that does not mean that one element is not revisited many times during the program development process. For instance, the venue for the 2015 Annual Meeting may have already been contracted by 2011, with budget, goals and objectives, as well as other elements projected from current practice and experience. So, while this model is linear, it is representative of one period of a cyclical process, since many association meetings are periodic/annual or semi-annual

However, caution is strongly advised. Conferences are complex projects and meeting professionals usually have project plans and lists that are far more complex than this conceptual map. This model is not prescriptive, but descriptive of the process as a means of providing a perspective on the elements identified in this research. The best advice for becoming a professional meeting planner and adult educator is to study both, incorporating the best learning in each arena into practice – to the benefit of the organization's mission, membership and target audience, which are the overarching drivers.

This model rests on those drivers: mission, membership to be served and the specific target audience designated for the particular conference. It is divided into three categories on the far left of this swim lane diagram: Continuing Professional Education (CPE), Business, and Venue, but is influenced by other vectors which, as identified by this research, include ongoing research for both project and the learning of the meeting professional, current trends including the greening of meetings and corporate social responsibility, and the needs of any special attendees, such as international registrants. Note that the three most important elements as identified the findings are identified again; goals & objectives, budget, and venue are bolded.



Let us look at the elements as they are described in each “lane” of the diagram. The CPE focused elements start with needs assessment, which will identify if accreditation or CEUs are pertinent for this group. Goals & objectives are the most important element followed by program design which is supported and influenced by good adult education practice. The next element is engagement which includes both engagement with learning as well as engagement with the organization and other members; networking is a part of this concept.

In the next lane, budget is the most important of the business elements, followed by marketing. Logistics, staffing & volunteers, technology, and vendors (such as transportation or web-registration contractors) are all listed in a group as they are more or less equal in importance in the planning of a program and are likely to be given somewhat equal attention, depending on the program. Exhibitors and sponsors are actually an income source, so they impact budget as an input. Later they are related to the CPE element of engagement. Much networking is planned for exhibit halls. Venue, again stands alone as the third most important element.

Two elements cross over all three categories. These are contingency planning as crises could erupt in any or all of them. For instance one program design sub-element is speakers. What if the major speaker became ill and had to cancel at the last minute? Does the program committee have a stand-in? In the business category, you might not make enough income on registration fees to make budget. Does the organization have enough reserves to make up the shortfall? An earthquake or fire could impact venue. Is there another place to meet or is there a plan in place in case the program has to be postponed and rescheduled?

Likewise, evaluation plans cross over all three categories as program educational success (hopefully this includes a measure of learning attainment), return on investment (budget reports), and venue all should be evaluated. Data from all evaluations should circle back and inform the next project.

The lines on this diagram represent interconnections. Budget impacts the following CPE elements: goals & objectives, program design and engagement. Goals & objectives impact marketing, logistics, staffing & volunteers, and technology. Exhibitors & sponsors have an influence on engagement, and since program design and engagement are related, on program design as well. Venue is related to both goals & objectives and budget and determine the parameters of what follows in each lane of the diagram including program design, engagement in the CPE category, marketing, logistics, staffing and volunteers, technology, and may determine vendors needed. For instance, is the venue so large and confusing that staff and/or volunteers, or perhaps even temporary staff must be hired to help attendees find their way from one place to another? Exhibitors and sponsors are the only element perhaps not directly related to venue, though the choice of location may encourage more exhibitors (and thus revenue to the program) if the location is such that many potential vendors have sales forces in the region making it less costly for them to attend.

In summary, this model is meant to be explanatory, rather than prescriptive. It is provided as a means to help describe the findings as well as help the reader understand them more clearly.

Recommendations for Further Research

Many ideas surfaced when analyzing the data. Suggestions for potential further inquiry are listed below along with new questions that the findings suggest. This may be one of the most important outcomes of this research.

- Utilize the findings of this study to create a quantitative study and administer it to a much wider group of association meeting planners. Such a study could be used to verify these findings as well as seek additional elements through open-ended items. The findings from a qualitative study offers the potential advantage of generalizability.
- Consider more work on the notion of engagement interlacing the adult education perspectives regarding learning with the association perspectives of networking, learning, and organizational connection with its members.
- Study the sources of adult education and related meeting planning information utilized by association and/or other types of meeting professionals. Utilize the 'bookstores' of the key meetings associations to identify the current practice literature to identify gaps and suggest ways to fill those gaps. Could the adult education literature more fully contribute?
- If learning in this field is supported by various membership associations, how do their publications and research projects influence practice?
- The Bureau of Labor Statistics (2010-2011) information listing types of backgrounds and training common to meeting and event planning does not list professionals in adult and continuing education. This may be an area for future policy action designed to work toward invigorating the field of meeting and event planning with professionals with a background in adult and continuing education.
- Identify and define the key differentiators between corporate and association planning.
- Conduct a similar study with corporate planners to identify their elements and then compare the findings of that study with the findings of this one. This could apply to other types of planners as well. Research could address understanding the role of various types of planners, if they have any special needs, and how this research's findings compares with their practice.
- Conduct a study into why association meeting professionals select this field of work. Identify common expertise or professional traits among them.
- Conduct case study research around successful contingency planning. The suspicion is that this is a challenging element about which, at least the meeting planners in this study, seemed to be aware, but inexperienced. Seek successful practice and initiate educational programs on best practices around this challenging planning element.
- Compare the findings of this study with the new *Meeting and Business Event Competency Standards, or MBCES* (Canadian Tourism Human Resource Council, 2011). Investigate where differences may exist within these standards for association type planners.
- There is simply no systematic reporting, no picture of the depth, breadth, and scope of CPE. Develop a list of key indicators that could provide the insight into this vast education enterprise so that it can be understood, challenges identified, and education programs designed to meet those challenges.
- Two previous studies involved interviews with people serving a variety of roles in association conference planning, and this study only addressed a single meeting

professional. Though meeting professionals certainly represent a key staff role in association meeting planning, the literature clearly addresses the power, interests, and inter-role dynamics of various groups (Cervero & Wilson, 1996, 1998, 2006). This suggests that to fully understand association CPE, investigation into the provision of education or association mission-driven CPE is complex and could better understood if all staff involved in supporting this function – and member volunteers who are similarly involved – be asked about their roles and perspectives.

Summary

This project sought to study actual practice to understand it better in light of the literature. The subject pool was very narrow and quite small and thus the results of this research cannot be generalized, only described relative to the participants themselves. Yet, by asking essentially, “What do you do in practice?” of a group of practitioners with long experience and credentialed in their particular field, we get a snapshot of what is actually happening in the field of association meeting planning. Many of the elements that these current and experienced meeting planners utilized appeared somewhere in the adult education literature, and some also were supported in the association literature. The findings though, fit no one single previous model. The most important implications may be to provide insight into differences among meeting planning professionals, stimulate future research, and suggest that ways be found to better connect what we know about good adult education practice into the field of continuing professional education conferences because continuing professional education impacts many people, and it is big business.

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