

DETERMINING SKILLS NECESSARY
FOR MEETING PLANNERS

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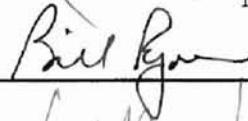
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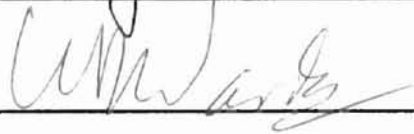
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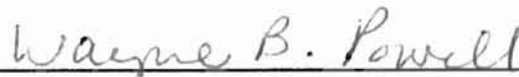
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CHAPTER I

INTRODUCTION

Meetings bring people together to furnish them with information, to have them work together to accomplish some task, and frequently for motivated purposes (O'Connor, 1980). Meeting planners plan the details and activities of all meetings. Thus, meeting planners have become an important part of the success of many meetings. Meeting planning has become a booming and worldwide industry that has increased over the last 25 years. Planning meetings is a major factor in the success of a planning system (O'Connor, 1980). There are many types of planners; corporate, association, government, and independent/private. Within this study, the meeting planners chosen were association, corporate and independent. An association planner is a full-time paid employee of a professional, trade industry, scientific, and other types of associations (Rutherford, 1990). A corporate planner is an employee of a business in which one of their responsibilities is the planning and execution of the details of meetings for the corporation employees, management, and owners for successful planners.

According to Shelton and Bauer (1994) many types of skills are needed for meeting planners to become successful in their professional careers. The components, organizational/leadership, communication, professional competency, and technology are skills that are needed for planner to be effective. Communicative skills required by

planners related to listening are disarming, empathy, and inquiry (Shelton & Bauer, 1994). Professional competency skills require tasks involved in meeting planning demand personal knowledge of and understanding the subject at hand. A planner is also a researcher, serving as an investigative reporter to compile information (Weissinger, 1992). Organization is another good tool that requires meeting planners to be attentive to details and problems solvers. A meeting planner must be able to perform tasks step by step (Weissinger, 1992). Meeting planners should also possess personal and professional qualities. They must develop high negotiation skills, accomplish objectives without offense and be creative (Rutherford, 1990).

The success of a meeting planner must be compared to cross reference that of an association, corporate and independent meeting planner to understand the career progress by education, training, types of meetings planned, number of meetings and skills utilized. Comparing these variables to the association, corporate, and independent meeting planner can help determine skills of a successful meeting planner. This information is valuable for graduates considering entry into the meeting planning industry as well as educators and those already in the meeting-planning field. Characteristics of association, corporate and independent meeting planners need to be explored to determine what makes each different and similar to one another.

Purpose of the Study

The purpose of this study was to determine the skills necessary for a professional career as an Association, Corporate or Independent Meeting Planner.

Objectives

The specific objectives as identified by the researcher of this study were:

1. To identify the organizational/leadership skills utilized among association, corporate and independent meeting planners.
2. To identify the technological skills utilized among association, corporate and independent meeting planners.
3. To identify the communication skills utilized among association, corporate, and independent meeting planners.
4. To identify the professional competency skills utilized among association, corporate, and independent meeting planners.
5. To compare and contrast skills necessary depending on size and type of meeting planned.
6. To identify skills in relation to educational level.

Hypotheses

Based on the overall purpose and identified objectives, three research hypotheses were investigated. It is hypothesized that:

Ho1. A significant relationship does not exist between association, corporate and independent meeting planners in characteristics of a) training or education in meeting or event planning, and b) level of education.

Ho2. A significant relationship does not exist between association, corporate, and independent meeting planners in characteristics of a) number of meetings planned and b) types of meeting planned.

Ho3. A significant difference does not exist between association, corporate and independent planners in skills utilized by meeting planners a) organizational/leadership skills, b) communication skills, c) professional competency, and d) technology skills

Assumptions

The following assumptions were made for the study:

1. Participants answered the questionnaire honestly and accurately
2. The participants were knowledgeable enough about meeting planning to actually answer the questionnaire.
3. Nominal group answers will encourage more ideas and not restrict.
4. Planners utilized the skills listed in the questionnaire.

Limitations

The research is limited in scope and general due to the following factors:

1. The study will be limited to population of all meeting planners listed in the 1997-98 Meeting Professionals International membership directory in forty-nine states (excluding Oklahoma). Therefore, the results will be generalized to meeting planners who are members of a similar organization across the nation.

2. There will be no way to ascertain whether responses represent true opinion of all meeting planners.

Definitions

1. Association planner - a full-time paid employee of a professional, trade, industry, scientific, and other types of associations in which 97% are involved in planning a major convention of which 68% plan one per year (Rutherford, 1990).

2. Communication skills-related to listening; include finding something to agree within, paraphrasing what an individual says, determine what is going on (Shelton & Bauer, 1994) Also refers to budget and negotiation of contracts (Weissinger, 1992).

3. Conference-deals with specific problems or development in the areas of scientific and technical, as well as trade (Astroff & Abbey, 1998)

4. Convention- involves a general session and supplementary smaller meetings. Can be produced with or without exhibits. Objectives of these meetings are giving market reports, introducing new products, and mapping a company strategy (Astroff & Abbey, 1998).

5. Corporate planner - an employee of a business in which one of their responsibilities is planning an execution of the details of meeting for the corporations employees, management, and owners (Rutherford, 1990).

4. Independent planner – private contractors (firms or individuals) who provide planning services directly to a client (Astroff & Abbey, 1998).

5. Meeting planner - plans and manages all details, activities, and interactions from the meeting's concept through the categories of activities of various types and sizes (Rutherford, 1990).

6. Organizational/Leadership skills-tasks that involve personal knowledge, step by step tasks, marketing, and require thorough knowledge of available resources

(Weissinger, 1992).

7. Professional Competency skills- personal and professional qualities including, research, diplomacy, culturally adept, and accomplishing objectives without offense

(Weissinger, 1992), (Rutherford, 1990).

8. Skill – proficiency; expertness. An ability or technique (Webster's II, 1984).

9. Special Events-events bringing a community together for purposes of fund raising, changing a communities image, expand its trade, stimulate its economy, and help companies to market and introduce products (Catherwood & Van Kirk, 1992).

10. Technology skills- includes video taping, satellite conferencing, Internet, CD-ROM desktop learning, virtual-reality meetings, new and ever-improving software, computer-enhanced linkages and e-mail (Cates, 1997), (Langham, 1995).

11. Workshops-general sessions involving only small group that deal with specific problems or assignments (Astroff & Abbey, 1998).

CHAPTER II

REVIEW OF LITERATURE

Introduction

Meetings may be defined as bringing people together to furnish them with information, to have them work together to accomplish some task, and frequently to motivate them. Planning meetings are a major factor in the success of a planning system (O'Connor, 1980). The word meeting is defined as: "A coming together of persons or things (or) an assembly; gathering of people, especially to discuss or decide on matters"(Rutherford, 1990, p. 1). Meetings are held for a variety of purposes which include: to keep abreast of today's ever changing technology; to keep sales goals on track; to meet for group motivation and rewards; and many more according to Astroff & Abbey, 1998. A meeting planner plans the details consequent to meetings of various types and sizes. They manage all details, activities, and interactions from the meeting's concept through the categories of activities such as site selection, negotiation, program planning, budgets, promotion, and evaluation (Rutherford, 1990).

Types of Planners

There are many types of planners; Corporate planners, Association planners, Government planners, and Independent/Private planners. A Corporate planner is an employee of a business in which one of their responsibilities is the planning and

execution of the details of meetings for the corporations employees, management, and owners. A corporate planner's role is head of the corporate planning department. They orchestrate the entire planning process and are usually responsible for preparing and overseeing the planning cycle meeting. The cycle begins by preparing the company's planning calendar and ends with approval of the plan by top management or the board (O'Connor, 1980).

The company planning system involves the act of developing corporate plans, and reviewing the plans of company units. It is the presence of people for the give-and-take that helps to forgive the strategy of the organization. Orientation and communication meetings are designed to build enthusiasm for the planning activity. These meetings are the occasion to emphasize the involvement and commitment of top managers to the planning process, and to review corporate direction and objectives. Presentation and review meetings are essentially the same things. These meetings are also known as "review and approval" meetings while in some cases a plan may be developed and reviewed in what is apparently an orientation meeting. They are meetings at which the division, subsidiary, operating or business unit lays out the strategic plan it has formulated, for corporate top management's approval. The focal points of "review and approval" meetings are:

1. Identification of strategic issues and mutual understanding of a strategy and for accomplishing those strategic issues;
2. Understanding of basic direction and mission of the operating unit;
3. General indication of resources to be used or generated to accomplish the mission;
4. Approval to proceed with development of operating plans for the following calendar year (O'Connor, 1980, p. 25).

There are also meetings conducted at the corporate level that are corresponding meetings held in business units, divisions, subsidiaries and other components of the

organization. These usually focus on the planning instructions and specific assignments for preparation of the material required for the formal plan. They may also describe the general context or company environment in which the unit is currently operating (O'Connor, 1980).

Enlisting outside participants is also another role played by the corporate planner. Companies will ask outside speakers to address some of their meetings, especially those that focus on the larger issues that affect planning. Enlisting speakers usually demands a broad knowledge of business trends, a wide circle of contacts, and experience of attending events where speakers may be looked over and evaluated for their possible future usefulness (O'Connor, 1980).

An Association planner is a full-time paid employee of a professional, trade, industry, scientific, and other types of associations in which 97% are involved in planning a major convention of which 68% plan one per year. Association planners are also involved in the execution of board meetings, educational seminars, professional and technical meetings, regional and local chapter meetings, and other types that may be required by the association executive board, staff, and membership (Rutherford, 1990).

An association may be considered an organized body that exhibits some variety of volunteer leadership structures. Associations may employ a staff that serves a group of people who have some interests, activity, or purpose that they share in common. The association is generally organized to promote and enhance common interest, activity, or purpose. There are many types of associations. A trade association is considered one of the most lucrative forms of meeting business because their members are composed of

executives who succeeded in business. A good example is the National Restaurant Association. They meet annually in Chicago with more than 110,000 attendees.

Professional and Scientific associations hold a number of regional and state workshops. They share subject matter ranging far and wide in the professional and scientific fields. Veteran and military associations are held by both “active-status” and veteran reunion groups of the military associations. They have large annual conventions and are usually interested in a resort-recreation site.

Another type of association is educational in which elementary, high school, and college teachers affiliate with academia. They hold many national meetings, and every state has a teachers association of some sort. Educators in the lodging and food service industry have their own association, Council on Hotel, Restaurant and Institutional Education (CHRIE).

Technical societies are found among technical professions. They hold annual conventions that are specific to their group. Some technical groups are wedding photographers and newspaper photographers who have their own associations and conventions (Astroff & Abbey, 1991).

Types of Meetings

All events are not just called meetings, even though that is basically what they are. There are a number of different types of meetings, each with its own name.

A conference is almost the same as a convention and involves much discussion and participation. The term “conference is most likely used in technical and scientific areas,

although it is used in trade as well. A conference program commonly deals with specific problems or developments and may or may not have smaller breakout meetings.

Conference could be small or large in attendance.

According to Astroff & Abbey, the most commonly used term in the industry is convention (1998, pg. 10). A convention is a meeting of delegates for action on particular matters such as politics, trade, science or technology. Conventions usually involve a general session and supplementary smaller meetings. Most are annual with or without exhibits.

A workshop involves only small groups for general sessions that deal with specific problems or assignments. Training directors for skill training and drills use the workshop format. Participants train each other as they share new knowledge, skills, and insights into problems. Workshops are characterized by face-to-face activity with much participation by all (Astroff & Abbey, 1998).

Special events range from the Olympics to a community-wide barbecue; from the Super Bowl and the NCAA Final Four basketball tournament to the "Tutankhman" exhibition. Special events are more than just well known athletic competitions and cultural performance. The events can bring a community together for purposes of fundraising, changing a city's image, expand its trade, stimulate its economy, and help companies to market and introduce new products. Special events are also opportunities not only for the promoter to bring a unique project to a community, but for the community and local companies to reach customers-and event sponsorships offer this opportunity (Catherwood & Van Kirk, 1992).

Types of Skills

Organizational/Leadership Skills

Some of the tasks involved in meeting planning demand personal knowledge while other require thorough knowledge of available resources. According to Weissinger, a planner must collaborate with senior management and in order to do so, the planner needs to understand the subject to be presented at the meeting. The understanding of human behavior is also another task involved for planners. "A planner may advise on the optimal timing and pacing of a program based on his or her knowledge of average attention spans and how often refreshments breaks are needed" (Weissinger, 1992, p. 3).

Meeting planners must be able to perform tasks step by step, which requires them to be good organizers. Making good lists and being attentive to detail is essential. The meeting planner must appear calm in the midst of chaos and implement immediate solutions to problems. They must also have the vitality and endurance for 12-hour workdays. On-site materials must be organized and the planner must have excellent managerial and personal skills (Weissinger, 1992).

In order for a meeting to be successfully promoted, one must first decide if it will be a meeting people want to attend. Secondly, encourage sponsors to be realistic about the attendance goal. Set obstacles and decide if there is enough time to properly market the program. Finally, evaluate any conflicts that could occur (Price, 1989).

Marketing is developed by strategies. There are three parts to a marketing strategy. The first is penetrating, the right people must read the promotional pieces and sell them on the value of their participation. The second is timing, the targets must be reached when they have the need, problem, interest, or time. The third is selling, keep

the real decision-makers in mind who have real influences ranging from the board of directors to children (Price, 1989).

Some planners work closely with senior management, talking with CEO's and establishing management policies and positions. They must also be people-oriented and outgoing yet tactful and polite. Meeting planners approach many strangers in which a touch of humor and compassion are also essential behavior skills (Weissinger, 1992).

Many planners need to know about advertising, promotion, and public relations to promote their meetings. The primary duty of the planner is to set the stage for the meeting. Such things as audience seating arrangements, head table, audiovisual equipment needs, entertainment, and decor must be staged and managed.

O'Connor suggests that preparing the calendar and arranging meetings needs to be designed in order to meet two key demands of the planning system; 1.) final approval of the corporate plan and 2.) budget preparation that meets fiscal-year deadlines. In setting dates, take into account the working time needed to fulfill the requirements of the various stages of the planning process and to coordinate division plans with the total corporate plan (O'Connor, 1980).

Professional Competency Skills

A meeting planner can also serve as a researcher, searching for things such as past meeting history and participant profiles. The planner must act as an investigative reporter to compile this information. Possible sites and properties must be investigated as well as knowledge of the geography and accommodations industry (Weissinger, 1992).

Some qualities that meeting planners should possess are personal and professional. A critical skill highly developed is making negotiation. Being culturally adept is important, as well because of a varied number of participants represent different

cultures will attend meetings. Diplomacy is another quality that incorporates negotiations and a culturally diverse workforce. A planner needs to be able to accomplish objectives without offense in order to have a successful event. Creativity plays a big role in the meeting planning industry. Planners are finding an increasing need to look for ways in which to accomplish the goals of the meeting that not only have practical validity but also, pay attention to the public's need for "something different" (Rutherford, 1990).

Communication Skills

Meeting planners must be good communicators. Some communicative skills required by meeting planners related to listening are disarm, empathy, and inquiry. The first listening skill is disarming which is listening and finding something to agree with in what the other is saying. Empathy requires that one put him or herself in the other person's shoes and look at the world through his/her eyes by paraphrasing what the individual says or identifies with his or her feelings. Inquiry asks a gentle-probing question to determine what is going on and works with the conflict (Shelton & Bauer, 1994).

Budgeting and negotiation of contracts is a major part in meeting planning. Expenditures must be within set limits, exploring costs, taking bids, and reconciling statements. The planner also verifies and counts the number of attendees, rooms reserved, and meals ordered. Contracts require close attention on the part of the planner. Such contracts are property contracts, which are extremely detailed. Transportation, audio-visual, technical, catering, attraction, and event companies are but a few of the outside vendors that will demand written contractual agreements for providing services for the meeting (Weissinger, 1992).

Technology Skills

Technology ranks as the most significant anticipated area of change within the meetings industry for the next two years, according to 1998 Meetings Outlook Survey (Association Management, 1997). Anticipated technology changes include video taping, satellite conferencing, Internet, CD-ROM desktop learning. This differs to the fact that meeting managers once relied on face-to-face communication to get the job done. With the development of virtual-reality meetings, new and ever-improving software, and increased reliance on the Internet and e-mail have led planners to find new and better way to plan meetings. (Cates, 1997).

Computer-enhanced meetings can provide linkages to existing databases as well as modeling and analysis aids (Langham, 1995). E-mail and online services offer time-saving advantages, such as RFP (request for proposal) and receiving answers within one day, or gathering ideas from other meeting planners electronically. Online services can provide insight into how others work; how quickly one responds to an inquiry, willingness to help others, and dealing with people (Langham, 1995).

With global barriers in languages, cultures and time zones, planners should use enhancements like the World Wide Web. The World Wide Web includes specialized online services like MPINet, and PC videoconferencing. Planners rely predominantly on the Web to communicate with clients' attendees. Web pages are also used to update meeting information, announce speaker changes, conduct online registration and provide links to relevant sites. (Cates, 1997). Videoconferencing includes meetings conducted

with one-way video and two-way video and two-way audio. It is effective for short, structured, goal-oriented meetings, but may seem impersonal or even staged.

Many planners have a tendency to buy into industry specific software, which is not always essential to managing meetings. Products like Microsoft Office and other suites of software can meet the meeting demands, but time is invested into making the software work. Rasco suggests buying a software program that performs the basics and create your own databases and reports to meet the needs (Cates, 1997). A group software that is becoming more useful for planners is Group Decision Support System (GDSS). GDSS or “groupware” is specially designed software that meeting participants use at workstations in an amphitheater outfitted with PCs to perform group tasks such as brainstorming and decision making. GDSS-supported meetings are often more satisfying to group members because they can participate more equitably. Dr. Janet Fulk said that organizations are exploring alternatives to traditional meetings for many reasons, one being the growing need for access to electronic data resources in decision making (Langham, 1995).

Audiovisual equipment for meetings can range from a simple flip chart to a sophisticated computer set-up for generating multimedia presentation. Planners should have a working knowledge of the basic types of equipment commonly used. The simplest form of multimedia is the sound/slide synchronizer. The synchronizers use a sound tape that automatically advances slides and provides music or narration during the presentation.

Other types of multimedia presentation equipment can include sound systems, video equipment, projectors, self contained display units, slide projectors, overhead projectors, lighting, screens, projector stands and spare parts (Astroff & Abbey, 1998).

Conclusion

Meeting planning has become a booming and worldwide industry. There are many types of planners as well as, the different tasks, knowledge, experience, and skills required as a successful meeting planner. To develop a full understanding of a corporate planner, the role of the corporate planner must be defined as well as the different types of corporation meetings. There are also many different types of associations to be familiar with in order for planners to have a full understanding about each specific group. The company planning systems is an act of the corporation to develop, review, and incorporate plans into the organization. Meetings are designed to bring people together in which they gather or form information. Even though there are different types of meeting planners, the whole purpose of each is to gather people to meet at one location.

CHAPTER III

METHODOLOGY

This chapter includes the research design, population, sample, and data collection including instrumentation and procedure, and data analysis. Data collection was conducted at a monthly Meeting Professionals International Meeting (MPI)-Oklahoma Chapter meeting and mailed to MPI members around the nation, which excluded Oklahoma members.

Research Design

The research design used in this study was a questionnaire distributed personally to Oklahoma MPI member participants and mailed to other participants, which excluded Oklahoma members, nation wide. The purpose of this study was to determine the skills necessary for corporate, association, independent and various other types of meeting planners. The specific objectives were as follows:

1. To identify the organizational/leadership skills utilized among association, corporate, and independent meeting planners.
2. To identify the technological skills utilized among association, corporate and independent meeting planners.
3. To identify the communication skills utilized among association, corporate, and independent meeting planners.

4. To identify the professional competency skills utilized among association, corporate, and independent meeting planners.
5. To compare and contrast skills necessary depending on size and type of meeting planned.
6. To identify skills in relation to educational level.

The dependent variables were an assessment of the importance of the various skills necessary for coordinating meetings. The skills were divided into four major areas 1) organizational/leadership, 2) communication, 3) professional competency, and 4) technology. See appendix A for a list of skills (Appendix A). The independent variables were selected demographic characteristics; such as, education levels, training or education in meeting planning, and types of meetings planned.

Population and Sample

The population in this study included a convenient sample of all planners who were listed in the 1997-1998 MPI membership directory (7290 members) and all planners who were members of the Oklahoma Chapter of MPI (72 members) (Membership Directory, 1997-98, Oklahoma Directory, 1997). The research sample consisted of the meeting planners who attended the March and April monthly Oklahoma Chapter MPI meeting. This sample did not include suppliers present at the meeting. It also consisted of a random sample of 200 meeting planners who are members of MPI, which included all other membership planners across the nation, with the exception of Oklahoma. Questionnaires were distributed to all planners attending the monthly meeting and mailed to the random sample of 200. It was assumed that participants answered the questionnaire honestly and accurately, were knowledgeable enough about meeting

planning to actually answer the questionnaire, that nominal group answers will encourage more ideas and not restrict them, and that planners utilized the skills listed in the questionnaire. Meeting Professionals International (MPI) is an international professional organization for those in the meeting planning industry. Membership includes a monthly magazine, quarterly newsletter, MPI international and Oklahoma membership listing, discounts at MPI events, meetings, and seminars, and MPI home page usage and benefits (MPI, 1997-98). Guidelines of the Oklahoma State University Institutional Review Board were followed and approval was secured before the survey was distributed. See appendix C for IRB approval form. Participation in this study was voluntary.

Data Collection

The research instrument for evaluating skills of meeting planners (Appendix A) was developed based on the literature review, past questionnaires used in previous research and comments from the graduate student committee (MPI Survey, Association Management Survey).

The instrument was divided into two sections. Section I included demographic variables such as type of planner, age, educational level, training, types of meetings planned, size of meetings planned, number of meetings planned, and membership information. Section II covered the different skills asking participants to rate them on a five point Likert-type scale, with 5 representing most important and 1 representing least important. This section listed 28 skills divided into four categories 1)- organizational/leadership skills, 2) communication skills, 3) professional competency skills, and 4) technological skills.

Procedure

The questionnaire contained a cover letter on OSU letterhead (Appendix A) to describe the research and provide instructions for completion of the questionnaire. Subjects were assured that names would not be associated with individual questionnaires and data collected would be analyzed as a composite result. Participants were given directions to read each statement and answer each and every question as honestly as possible. The second part of the questionnaire gave the following instructions: Meeting Planning Skills: (Respond to each of the statements below.) The following skills are utilized by meeting and event planners. Circle the number following each statement that best describes the extent to which you feel each skill is least important or most important in your professional career, from a scale of 1-5 with 1 being the least and 5 being the most (Appendix A). Questionnaires were distributed in person on March 11, 1998 and April 8, 1998 at a MPI Oklahoma chapter meeting and mailed on June 23, 1998 to the random sample, excluding Oklahoma, of planners across the nation. The participants at the MPI meeting were asked to complete the questionnaires and return them to the researcher. The mail participants were instructed to fax the questionnaire back to the researcher. The survey participants were given the opportunity to request results. A second mailer, which was a reminder post card, sent 3 weeks after the questionnaires were distributed on July 15, 1998 (Appendix B). The post card simply reminded participants to complete and return the questionnaire.

Data Analysis

The questionnaires were coded and tabulated for analysis. The data was then entered and transferred into the computer using the PC-File III Software Program (1985). Standard statistical procedures were used to analyze data (Statistical Analysis System,

1985). Data was collapsed in the areas of age education level, training, size of meetings, and average total number of meetings planned. Age was collapsed in the areas of under 25 and 25; 42; 45-54 and 55 & over. With in the area of education-some college or post high school was combined with less than high school and high school, and bachelor's degree, master's degree, and doctorate degree were combined into one category. Training was collapsed in the areas of formal class, college course and correspondence course. Size of meetings were divided into three categories in which 1001-5000 was combined with 5001-10,000 and 10,00+. The average total of meetings planned was collapsed into two categories in which 101-25, 501-1000, and 1000+ were collapsed together. Four questionnaires were thrown out because they were not complete or not readable due to the faxing process. Demographic variables were analyzed using frequencies and percentages. Skill ranking was based on the means average of the 28 skills. Frequencies and row percentages were calculated using the chi square correlation analysis to compute education, training, and types of meetings planned correlation to the four categories of skills, organizational/leadership, communication, professional competency, and technological skills. Significance levels were established at $p \leq 0.10$.

CHAPTER IV

RESULTS AND DISCUSSION

The purpose of this study was to determine the skills necessary for a professional career as an association, corporate or independent meeting planner and to determine if correlations exist in relation to demographic variables such as gender, age, education level, training, types of meetings planned, number and size of meeting planned, and membership information. Data was obtained from the questionnaire as described in Chapter III. The questionnaire was distributed to 24 meeting planners at the Oklahoma Chapter MPI meeting and mailed to 200 of a random sample of meeting planners of MPI across the nation, excluding Oklahoma. Of the 24 distributed, 18 were returned for a total response rate of 75%. The questionnaires that were mailed had a return of 47 with a response rate of 27%. Four questionnaires were thrown out because they were incomplete for a total response rate of n=61. Of the four questionnaires that were thrown out, 2 of them were male respondents.

Demographic Characteristics

Descriptive statistics were utilized to describe demographic characteristics of the respondents using means and frequencies. Table I was constructed to give the researcher

a better understanding of the personal business characteristics of all the respondents at the time of the study.

Gender, Age, Education, and Type of Planner

Females made up the entire study of participants who responded to the questionnaire, 100% (n=61). Age categories were those at age 34 or less, between the ages of 35-44 or the age of 45 or older. In response to education, 29.5% had some college or less and 70.5% had a bachelors degree or higher. The survey asked for the respondents type of planner which the researcher calculated the percentages of corporate (29.5%), association (36.1%), independent (19.7%) other types of planners (14.8%) that consisted of educational, government, university, CME (Certified Meeting Executive) Director, and incentive planners (Table I).

TABLE I
NUMBER AND PERCENTAGE OF SUBJECTS ACCORDING TO DEMOGRAPHIC VARIABLES

DEMOGRAPHIC VARIABALES	Frequency	Percentage
TYPE OF PLANNER		
Corporate	18	29.5
Association	22	36.1
Independent	12	19.7
*Other	9	14.8
Total	61	100.1
GENDER		
Male	0	0.0
Female	61	100.0
Total	61	100.0
AGE		
Below 34	23	37.7
35-44	16	26.2
45 and over	22	36.1
Total	61	100.0
CERTIFICATION		
CMP(Certified Meeting Planner)	19/61	31.1
**Other certifications	4/61	6.6
EDUCATION LEVEL		
Some college or less	18	29.5
Bachelor degree or higher	43	70.5
Total	61	100.0
TRAINING IN MEETING PLANNING		
No training	4/61	6.6
Training on the Job	50/61	82.0
Formal Course or Class in Meeting Planning	26/61	42.6
TYPES OF MEETINGS PLANNED		
Conferences	50/61	82.0
Conventions/Shows	37/61	60.7
Special Events	39/61	63.9
Workshops	38/61	62.3
***Other	25	43.1
SIZE OF MEETINGS		
1-250	52/61	85.2
251-500	32/61	52.5
501-1000	20/61	32.8
1001+	27/61	44.3
NUMBER OF MEETING/YEAR		
1-25	40	65.6
26-100	14	23.0
101-1000	7	11.5
Total	61	100.1

N=61

*Other types of planners included: educational, government, university, CME (Certified Meeting Executive) Director, and incentive planners.

**Other certifications include: PCMA & ASAE

***Other types of meetings planned include: Sales meetings, ceremonial, training seminars, product information, executive manager meetings, festivals, fairs, incentive, golf tournaments.

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Skill Ranking

The participants rated each of the skills on a Likert-type scale with 1 being least important to 5 being most important. The communication skill described in the questionnaire as negotiation was ranked the highest with a mean of 4.79, maximum answers were 5 and minimum answers were 3, with a standard deviation of .483. The technology skill, video conferencing, ranked the lowest skill among all meeting planners with a mean of 2.63, with a maximum answer of 5 and minimum answer of 1, standard deviation was 1.032. Other skills that were rated in the top ten were listening, crisis management, knowledge of the industry, organizational management, human relations, verbal, financial management and writing. All of these skills fall in the categories of organizational/leadership, communication, and professional competency. Technology skills were not rated in the top ten. The skills marketing and program evaluation were tied with a mean ranking of 3.84 (Table II).

TABLE II
RANK ORDER OF SKILLS BY MEANS

Rank	Skill	Mean	Minimum	Maximum	Std. Dev.
1	Negotiation-OS	4.79	3.0	5.0	.483
2	Listening-CS	4.71	3.0	5.0	.523
3	Time Management-OS	4.64	3.0	5.0	.549
4	Crisis Management-OS	4.56	2.0	5.0	.671
5	Knowledge of the Industry-PC	4.55	3.0	5.0	.649
6	Organizational Management-OS	4.40	1.0	5.0	.887
7	Human Relations-OS	4.36	2.0	5.0	.731
8	Verbal-CS	4.30	3.0	5.0	.561
9	Financial Management-OS	4.28	2.0	5.0	.756
10	Writing-CS	4.25	3.0	5.0	.604
11	Creativity-OS	4.20	2.0	5.0	.726
12	Process Management-OS	4.15	2.0	5.0	.799
13	Electronic Mail-TS	4.03	2.0	5.0	.870
14	Strategic Planning-OS	4.02	1.0	5.0	.846
15	*Marketing-OS	3.84	1.0	5.0	1.003
16	*Program Evaluation-OS	3.84	2.0	5.0	.778
17	Database Processing-TS	3.83	2.0	5.0	.834
18	Training-OS	3.75	2.0	5.0	.895
19	Spreadsheet-TS	3.71	2.0	5.0	.911
20	Internet Usage-TS	3.69	1.0	5.0	1.038
21	Delegation-OS	3.67	2.0	5.0	.769
22	Multi-media presentation/equipment-TS	3.56	1.0	5.0	.970
23	Political/Legal Issues-PC	3.45	1.0	5.0	.891
24	Meeting Planning Software-TS	3.39	1.0	5.0	1.114
25	Research-PC	3.38	1.0	5.0	.976
26	Public Speaking-CS	3.35	1.0	5.0	1.022
27	Time Management Software-TS	2.78	1.0	5.0	1.018
28	Video Conferencing-TS	2.63	1.0	5.0	1.032

N=61

*Signifies a tie based on mean value five point, Likert-type scales were used (5=most important, 1=least important).

OS-Organizational/Leadership Skills

CS-Communication Skills

PC-Professional Competency Skills

TS-Technology Skills

Correlation Analysis

A chi-square correlation analysis was performed to determine if any correlation existed between the demographic characteristics and all four categories of skills; organizational/leadership, communication, professional competency, and technical skills. The data determined a correlation between 21 of the 28 skills in relation to education, training and types of meetings planned. The following tables (Tables 1 through 9 – Appendix D) summarize the planners rating scores in the areas of education, training, and types of meetings planned. There were no significant correlations discovered at the $p \leq .10$ between size of meeting planned and the number of meetings planned in relation to meeting planning skills.

Education and Skills

There were significant differences between individuals with educational levels and skill that respondents believe are necessary for planning meetings in the areas of creativity, public speaking, and other communication skills at the $p \leq .10$ level. (Table III). Among the 18 participants with less than a college degree, 11 (61.1%) participants rated creativity (an organizational/leadership skill) as most important and 0 rated as least important. Compared to the 43 participants with a bachelor degree or more, 11 (25.58%) rated creativity as most important and 0 rated as least important. When looking at the communication skill, public speaking, 18 participants with less than a college degree zero rate the skill as most important and 2 (11.11%) rated as least important. Comparing that to 42 participants with a bachelor degree or more, 8 (19.05%) of the 42 believed that public speaking was most important and zero felt that it was least important. Other communication skills include personal, cultural awareness, and team management, which of the 18 with less than college degree only 7 (38.89%) felt these were most important.

Compared to the 41 with a bachelor degree or more, 13 (31.71%) believed that these skills were most important. The correlation between education and the meeting planning skills are shown in Table III.

TABLE III
CHI-SQUARE CORRELATION ANALYSIS FOR EDUCATION (<COLLEGE DEGREE AND COLLEGE DEGREE OR HIGHER) AND MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Creativity	3	7.28	.064
Public Speaking	4	9.92	.042*
†Other Communication Skills	2	14.23	.001***

N=61

†Other communication skills that were listed include cultural awareness, team management, and personal.

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

Training and Skills

There were significant differences at the $p \leq .10$ level between individuals with no training and the skills the respondents believe are necessary for planning meetings in the areas of, creativity, financial management, program evaluation, listening, internet usage, and time management software, (Table IV). Participants rated the skills on a 5 point Likert-type scale with 5 being most important and 1 being least important.

In reference to no training and education in the area of meeting planning, of the 4 (100%) with no training/education all rated the skill creativity as most important. The skill titled financial management was not rated as most important or least important with those who had no training and education in meeting planning. Program evaluation was viewed least important by 1 (25.0%) of the 4 participants who responded with no training in meeting planning. The skill titled listening was rated by 1 of the 4 participants with no training/education in meeting planning as least important with 1 frequency missing. A total of 3 participants with no training and education in meeting planning selected Internet usage as most important. Time management was rated by 2 (66.67%) of the 3 participants, who selected no training/education in meeting planning, as least important. Within this correlation there were two missing frequencies.

Participants with on the job training by co-worker or supervisor believed the skills; delegation, public speaking, verbal communication, political/legal issues, and e-mail were most important skills. The correlation is described in Table V. Delegation was rated as most important by 6 (12%) of the 50 who had training on the job. Only 1 (2.00%) participant rated delegation as least important. Public speaking was selected as most important by 4 (8.16%) of the 49 participants. Again, only 1 (2.04%) participant rated public speaking as least important with 1 missing response. Verbal communication was rated at most important by 17 (34.69%) of the 49 who have training on the job by a co-worker or supervisor with a missing frequency of one. Other participants with on the job training, only 2 (4.08%) rated the skill political/legal issues as most important on the Likert scale there was one missing response. Fifteen (30.61%) of the forty-nine participants with on the job training rated e-mail as most important, with two missing responses.

There were significant differences at the $p \leq .10$ level between individuals with training by a formal class or course in meeting planning and skills that respondents believe are necessary for planning meetings in the areas of strategic planning and multi-

media equipment (Table VI). Ten (38.46%) of twenty-six participants with training by a formal class rated the skill strategic planning on a five point Likert-type scale as most important skill. Total participants of 25 determined a correlation to multimedia equipment in which 7 (28%) rated the skill as most important with a frequency of 2 missing.

TABLE IV
CHI-SQUARE ANALYSIS FOR RESPONDENTS WITH NO TRAINING AND THEIR
RESPONSE TO MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Creativity	3	7.59	.055*
Financial Management	3	9.13	.028*
Program Evaluation	3	12.04	.007**
Listening	2	6.96	.031*
Internet Usage	4	10.16	.038*
Time Management Software	4	8.10	.088

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE V
CHI-SQUARE ANALYSIS FOR PARTICIPANTS WITH ON THE JOB TRAINING
AND THEIR RESPONSE TO MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Public speaking	4	8.58	.073
Verbal	2	5.16	.076
Political/Legal Issues	4	10.53	.032*
E-mail	3	15.16	.002**

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE VI
CHI-SQUARE ANALYSIS FOR PARTICIPANTS WITH A FORMAL CLASS OR
COURSE TRAINING AND THEIR REPOSENSE TO MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Strategic Planning	4	9.46	.050*
Multi-media Equipment	4	8.09	.088

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

Types of Meetings and Skills

The types of meetings planned by meeting planners were selected and correlated to the different skills such as process management, other communication skills, knowledge of the industry, delegation, meeting planning software, time management software, crisis management, financial management, marketing, strategic planning, public speaking, research, and spreadsheet (Table VII). Of the 49 participants who plan conferences and rated process management, 19 (38.78%) rated the skill as a most important skill with a frequency of 1 missing. Other communication skills were rated by 18 (37.5%) of 48 planners who plan conferences as most important with 2 frequencies missing.

Participants who planned conventions/trade shows and rated delegation, 2 (5.41%) of the 37 determined that it was most important on the Likert-type scale with a rank of 5. According to meeting planning software and participants who plan convention/trade shows only 5 (13.89%) of 35 rated the skill as most important and 1 (2.78%) rated the skill as least important with 2 frequencies missing. Table VIII outlines the correlation of skill and planners who plan convention/trade shows. There was also a correlation between participants who plan convention and trade shows and the skill time management software. Of the 36 total participants, only 1 (2.78%) rated the skill as most important and 4 (11.11%) rated as least important.

Another correlation identified was between those who plan special events and the organizational skill, crisis management (Table IX). The total respondents of 39 rated this skill and 22 (56.41%) said it was most important while only 1 (2.56%) rated the skill least important. Those who plan special events also rated time management. This correlation rated the skill as least important with 7 (18.42%) of the total 38 who selected special events as the types of meetings planned. In this correlation 2 respondents were missing.

Workshops were another type of meeting planned by participants. The correlation between workshops and financial management determined that of the 38 who plan workshop, 17 (44.74%) rated the skill as most important. Workshops and the skill marketing determined that of the 38 who plan workshops, only 8 (21.05%) rated it as most important. Workshops and process management determined that of the 38 who plan workshops, 19 (50%) determined that the skill was most important with one frequency missing. Public speaking was ranked by 37 participants who plan workshops as most important by only 3 (8.11%) and least important by 1 (2.70%) with one frequency missing.

Other communication skills were determined in a correlation to those who plan workshops. Total number of participants who plan workshops and rated other communication skills was 36 in which 10 (27.78%) rated the skill as most important with two frequencies missing. Other types of meetings and strategic planning determined a correlation. Based on the 25 participants, who plan other types of meetings, 11 (44.0%) rated strategic planning as most important and only 1 (4.00%) rated as least important. The correlation is outlined in Table X.

In correlation to other types of meetings and public speaking, 4 (16.67%) of the 24 participants rated the skill as most important and 2 (8.33%) rated as least important with 4 missing frequencies. The skill research and other types of meetings planned determined a correlation with 4 (16.67%) rating most important and 2 (8.33%) least important of the total 24 participants. Of this correlation, 4 respondents were missing. Another correlation exists between other types of meetings and the technical skill, spreadsheet. The total number of participants who plan other types of meetings and the technical skill, spreadsheet was 24 with 8 (33.33%) rating the skill as most important, and 4 (16.67%) rating the skill as least important with 5 missing responses. A chi-square correlation analysis for the different types of other meetings planned in correlation to the skills are determined in table XI.

TABLE VII
CHI-SQUARE ANALYSIS FOR PARTICIPANTS REPOSE TO TYPES OF
MEETING PLANNED-CONFERENCES AND MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Process Management	3	6.21	.102
Other Communication Skills	2	6.65	.036*
Knowledge of the Industry	2	13.71	.001***

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE VIII
CHI-SQUARE ANALYSIS OF PARTICIPANTS AND THEIR RESPONSE TO TYPES
OF MEEITNGS PLANNED-CONVENTION/TRADE SHOWS AND MEETING
PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Delegation	3	10.84	.013**
Meeting Planning Software	4	8.75	.068
Time Management	4	10.23	.037*

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE IX
CHI-SQUARE ANALYSIS OF PARTICIPANTS RESPONSE TO TYPES OF
MEETINGS PLANNED-SPECIAL EVENTS AND MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Crisis Management	3	11.70	.008**
Time Management Software	4	8.40	.078

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE X
CHI-SQUARE ANALYSIS FOR PARTICIPANTS REPOSE TO TYPES OF
MEETINGS PLANNED-WORKSHOPS AND MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Financial Management	3	6.75	.080
Marketing	4	9.56	.049*
Process Management	3	8.63	.035*
Public Speaking	4	8.46	.076
Other Communication Skills	2	6.80	.033*

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

TABLE XI
CHI-SQUARE ANALYSIS FOR PARTICIPANTS RESPONSE TO OTHER TYPES OF
MEETINGS PLANNED AND MEETING PLANNING SKILLS

<u>Skill</u>	<u>DF</u>	<u>Value</u>	<u>p-value</u>
Strategic Planning	4	7.75	.101
Public Speaking	4	10.64	.031*
Research	4	10.12	.039*
Spreadsheet	3	6.20	.102

N=61

***p-value is highly significant at $p \leq .001$

**p-value is very significant at $p \leq .01$

*p-value is significant at $p \leq .05$

CHAPTER V

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Purpose and Objective

The purpose of this study was to determine skills necessary for a professional career as an Association, Corporate or Independent Meeting Planner. The specific objectives of this study were: 1) To identify the organizational/leadership skills utilized among association, corporate and independent meeting planners. 2) To identify the technological skills utilized among association, corporate and independent meeting planners. 3) To identify the communication skills utilized among association, corporate, and independent meeting planners. 4) To identify the professional competency skills utilized among association, corporate and independent meeting planners. 5) To compare and contrast skills necessary depending on size and type of meeting planned. 6) To identify skills in relation to educational level. Three hypotheses were postulated to determine if selected variables (education, training, and type of meetings planned) were related to organizational skills, communication skills, professional competency skills, and technology skills.

Sample and Population

The population in this study included a convenient sample all planners who were listed in the 1997-1998 MPI membership directory, 7290 members, and all planners who were members of the Oklahoma Chapter of MPI 72 members. The research sample consisted of the meeting planners who attended the March and April monthly Oklahoma Chapter MPI meeting (n=24). This sample did not include suppliers present at the meeting. It also consisted of a random sample of 200 (n=200) meeting planners that were members of MPI, which included all other membership planners across the nation, with the exception of Oklahoma.

Instrument

The research instrument for evaluating skills of meeting planners (Appendix A) was developed based on the literature review, past questionnaires and comments from the graduate student committee.

The instrument was divided into two sections. Section I included demographic variables such as type of planner, age, educational level, training, types of meetings planned, size of meetings planned, number of meeting planned, and membership information. Section II covered the 28 different skills divided into four categories 1) organizational/leadership skills, 2) communication skills, 3) professional competency skills, and 4) technological skills asking participants to rate them on a Likert-type scale of 1-5, with 5 representing most important.

Data Collection and Analysis

The questionnaire contained a cover letter on OSU letterhead (Appendix A) to describe the research and provide instructions for completion of the questionnaire. Subjects were assured that names would not be associated with individual questionnaires and data collected would be analyzed as a composite result. Participants were given directions to read each statement and answer each and every question as honestly as possible. The second part of the questionnaire gave the instructions to circle the extent to which the participants felt that each skill was least important or most important in their professional career based on a 5 point Likert-type scale. Questionnaires were distributed in person on March 11, 1998 and April 8, 1998 at a MPI Oklahoma chapter meeting (n=24) and mailed on June 23, 1998 to the random sample (n=200), excluding Oklahoma, of planners across the nation. The participants at the MPI meeting were asked to complete the questionnaires and return them to the researcher. The mail participants were instructed to fax the questionnaire back to the researcher. The survey participants were given the opportunity to request results. A second mailer, which was a reminder post card, was sent 3 weeks after the questionnaires were distributed on July 15, 1998. The post card simply reminded participants to complete and return the questionnaire as soon as possible. This questionnaire was approved by the Institutional Review Board at Oklahoma State University on March 5, 1998 (Appendix C). The summarized results of the data collected from the questionnaires completed by the random sample of nation wide participants and Oklahoma are presented in Chapter IV and listed in Appendix D-

Tables 1-9. Data obtained from the 61 questionnaires were analyzed using frequencies, percentages, and Chi-square correlation analysis.

Findings and Conclusions

All of the respondents (n=61) were of the female gender. Almost an even number of respondents were spread among the three categories of age, less than 34 (37.7%), 34-44 (26.2%), and 45 or older (36.1%). In response to education, 29.5% had some college or less and 70.5% had a bachelors degree or higher. The types of planners who responded were 29.5% corporate, 36.1% association, 19.7% independent, and 14.8% were other types of planner such as educational, government, university, CME, and incentive planners.

The participants rated each of the skills on a five point Likert-type scale with 1 being least important to 5 being most important. The research found negotiation (mean=4.79) to be the most important skill necessary for meeting planners; listening was the next most important skills with a mean of 4.71; time management ranked 3rd with a mean of 4.64; crisis management was ranked as number 4 with a mean of 4.56 and knowledge of the industry was the fifth most important skill for planners with a mean of 4.55.

Ho1- There was a significant positive correlation at the $p \leq .10$ level between meeting planners and educational/training in meeting planning and the perceived skills necessary for successful meeting planning. Planners with all levels of education showed a positive significant correlation between the perceived level of creativity (p-value=.064),

public speaking (p-value=.042) and other communication skills (p-value=.001) necessary for successful meeting planning. Planners with no training in meeting planner perceived the level of creativity (p-value=.055), financial management (p-value=.028), program evaluation (p-value=.007), listening (p-value=.031), internet usage (p-value=.038), and time management software (p-value=.088) necessary for successful meeting planning. Planners with on the job training by a co-worker or supervisor perceived the skills public speaking (p-value=.073), verbal (p-value=.076), political/legal issues (p-value=.032), and e-mail (p-value=.002) as those skills necessary for successful meeting planning. Planners with a formal class or course in meeting planning perceived the skills strategic planning (p-value=.050), and multi-media equipment (p-value=.088) as the two skills necessary for meeting planning.

Ho2-There was a significant positive correlation at the $p \leq .10$ level between meeting planners and types of meetings planned and the perceived skills necessary for meeting planning. However, there was not a significant correlation between the number of meetings planned and the skills necessary for meeting planning. Planners who planned conferences believed that process management (p-value=.102), other communication skills (p-value=.036), and knowledge of the industry (p-value=.001) are important skills to have. Planners who plan convention/trade shows believed that delegation (p-value=.013), meeting planning software (p-value=.068), and time management (p-value=.037) are specific skills to have for planning such events. Planners who plan special events believed that crisis management (p-value=.008) and time management software (p-value=.078) were the only two skills to have to be successful. Planners who plan workshops believed that financial management (p-value=.080), marketing (p-

value=.049), process management (p-value=.035), public speaking (p-value=.076), and other communication skills (p-value=.033) are necessary skills to have.

Ho3-There was no significant finding in relation to association, corporate, and independent meeting planners and the skills utilized in the areas of a.)organizational/leadership, b.)communication skills, c.)professional competency, and d.) technology skills.

Implications

The findings and conclusions of this study led the researcher to make the following statements as to the skills necessary for association, corporate, and independent planners.

1. Educators and the industry could utilize this information to develop effective training or educational programs for the meeting planners.
2. The survey could be developed into a phone or e-mail survey to reach more planners at various sites around the world.
3. The information could be utilized to provide an individualized focus on different types of meetings. All meeting planners do not need the same skills-skills vary based on the planners interest and types of meetings planned.
4. The surveys should be distributed in person to receive a higher response rate.
5. Authors of textbooks could utilize this information to write books for educators that focus on the important skills for meeting planners.

Recommendations

This study was undertaken to develop an understanding of skills necessary according to corporate, association, and independent meeting planners. The researcher looked at basic demographics of the respondents, ranking and correlation's of skills identified. Recommendations of revisions of this research project and additional research questions that should be answered in the future are:

1. It is recommended that other meeting planning associations be surveyed.
2. It is recommended that a larger sample size be utilized for increased validity of the study.
3. It is recommended that research be continued to identify geographic location of participants in the demographic section.
4. It is recommended that research be continued to identify skill changes in the meeting industry.
5. It is recommended that research be continued to identify gender differences in the meeting planning industry.

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APPENDIXES

APPENDIXES A
COVER LETTER AND QUESTIONNAIRE

June 23, 1998

Greetings Meeting Planner!

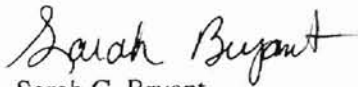
You have been chosen to voluntarily participate in a very important study entitled "Skills Necessary for Meeting Planners." Because meeting planning is becoming a booming and worldwide industry, it is necessary to know what skills are required for meeting planners to become successful. This information is important for educators to be able to better prepare future meeting planners and develop continuing education programs.

Thank you in advance, for your participation in this project. This short questionnaire should take approximately 10 minutes of your time to complete. Then simply fax back to Sarah Bryant at (405)-744-6299 or mail to Sarah Bryant, School of Hotel & Restaurant Administration, 210 HESW, Oklahoma State University, Stillwater, OK 74078. Please return the questionnaire by **July 7, 1998**. You do not need to sign your name, as all the data will be treated confidentially and no individual information will be identified.

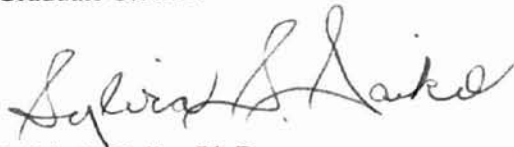
By completing this questionnaire, you are helping the industry clarify some specific skills for meeting planners. For results and summaries of this survey, please send a separate letter requesting the information with your mailing information to the address above.

If you have any questions or need further assistance, please call Sylvia Gaiko, at (405) 744-8481, or contact Gay Clarkson, Institutional Review Board Secretary, 305 Whitehurst, Oklahoma State University, Stillwater, OK 74078; (405) 744-5700. We look forward to receiving your response, thank you again.

Sincerely,



Sarah C. Bryant
Graduate Student



Sylvia S. Gaiko, Ph.D
Major Advisor

Meeting Planning Skills Questionnaire

Demographics: (Please mark the most appropriate response.)

What type of Planner are you? (check only one)

- Corporate Planner
 Association Planner
 Independent Planner
 Other (Please list) _____

Are you: Male Female

Your Age: under 25 25-34 35-44 45-54 55 & over

Are you a: (check all that apply)

- CMP
 CHSE
 CAE
 CMM
 Other (please specify) _____

What is the highest level of education you have completed? (check only one)

- less than high school
 high school
 some college or post high school (please list) _____
 Bachelor's degree
 Master's degree
 Doctorate degree

What kind of training or education have you had in meeting or event planning? (check all that apply)

- none
 on-the-job by a co-worker
 on-the-job by a supervisor
 formal class
 college course (list title of course) _____
 correspondence course
 Certified Meeting Planner Course
 other (please specify) _____

Please check the types of meeting that you plan. (check all that apply)

- Conferences
 Conventions/Shows
 Special Events
 Workshops
 Other (please list) _____

Based on attendance, what size of meetings or events do you plan? (check all that apply)

1-250 251-500 501-1000 1001-5000 5001-10,000 10,000+

Please check the average total number of meetings you usually plan per year. (check only one)

1-25 26-100 101-250 251-500 501-1000 1000+

Meeting Planning Skills: (Respond to each of the statements below.)

The following skills are utilized by meeting and event planners. Circle the number following each statement that best describes the extent to which you feel each skill is least important or most important in your professional career, from a scale of 1-5, with 1 being the least and 5 being the most.

LEVEL OF IMPORTANCE

Organizational Events/Leadership Skills	Least					Most
Creativity	1	2	3	4	5	
Crisis management	1	2	3	4	5	
Delegation	1	2	3	4	5	
Financial management	1	2	3	4	5	
Human relations	1	2	3	4	5	
Marketing	1	2	3	4	5	
Organizational management	1	2	3	4	5	
Process management	1	2	3	4	5	
Program evaluation	1	2	3	4	5	
Strategic planning	1	2	3	4	5	
Time management	1	2	3	4	5	
Training	1	2	3	4	5	
Other (please specify) _____	1	2	3	4	5	
Communication Skills						
Listening	1	2	3	4	5	
Negotiation	1	2	3	4	5	
Public speaking	1	2	3	4	5	
Verbal	1	2	3	4	5	
Writing	1	2	3	4	5	
Other (please specify) _____	1	2	3	4	5	
Professional Competency						
Knowledge of the industry	1	2	3	4	5	
Political/Legal issues	1	2	3	4	5	
Research	1	2	3	4	5	
Other (please specify) _____	1	2	3	4	5	
Technology Skills						
Database processing	1	2	3	4	5	
Electronic mail	1	2	3	4	5	
Internet usage	1	2	3	4	5	
Meeting planning software	1	2	3	4	5	
Multi-media presentation/equipment	1	2	3	4	5	
Spreadsheet	1	2	3	4	5	
Time management software	1	2	3	4	5	
Video conferencing	1	2	3	4	5	
Other (please specify) _____	1	2	3	4	5	

APPENDIXES B
REMINDER POSTCARD

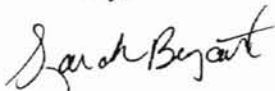
July 15, 1998

About three weeks ago a questionnaire entitled "Meeting Planning Skills Questionnaire" was sent to gather your opinions on skills related to meeting planning.

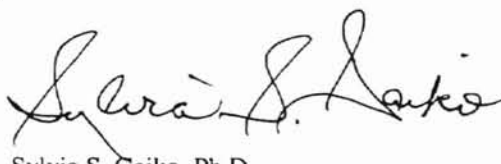
If you have already completed the questionnaire and returned it to us, please accept our sincere **THANKS**. If you have not, please do so today. The questionnaire was sent to only a small, but representative group of meeting planners. Therefore, it is extremely important to include your responses in the study for the results to accurately reflect the opinions of all meeting planners. Simply fax the questionnaire to Sarah Bryant at (405) 744-6299 or mail to Sarah Bryant, School of Hotel & Restaurant Administration, 210 HESW, Oklahoma State University, Stillwater, OK 74078.

If you did not receive the questionnaire, or if it was misplaced, please call (405) 744-6713 and another will be faxed or mailed to you today.

Sincerely,



Sarah Bryant
Graduate Student



Sylvia S. Gaiko, Ph.D.
Major Advisor

APPENDIXES C
INSTITUTIONAL REVIEW BOARD APPROVAL FORM

OKLAHOMA STATE UNIVERSITY
INSTITUTIONAL REVIEW BOARD
HUMAN SUBJECTS REVIEW

Date: March 3, 1998

IRB #: HE-98-068

Proposal Title: DETERMINING SKILLS NECESSARY FOR MEETING PLANNERS

Principal Investigator(s): Sylvia Gaiko, Sarah C. Bryant

Reviewed and Processed as: Exempt

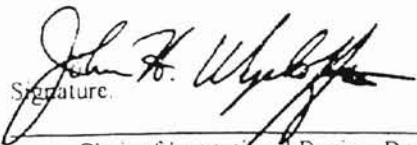
Approval Status Recommended by Reviewer(s): Approved

ALL APPROVALS MAY BE SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT NEXT MEETING, AS WELL AS ARE SUBJECT TO MONITORING AT ANY TIME DURING THE APPROVAL PERIOD

APPROVAL STATUS PERIOD VALID FOR DATA COLLECTION FOR A ONE CALENDAR YEAR PERIOD AFTER WHICH A CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE SUBMITTED FOR BOARD APPROVAL.

ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR APPROVAL.

=====
Comments, Modifications/Conditions for Approval or Disapproval are as follows:


Signature.

Chair of Institutional Review Board
cc Sarah C Bryant

Date: March 5, 1998

APPENDIXES D
SUMMARY OF RAW DATA

Table 1
 EDUCATION LEVELS STATISTICS AND SKILLS CREATIVITY, PUBLIC SPEAKING,
 AND OTHER COMMUNICATION SKILLS BY ROW PERCENTAGES

<u>Skill</u>	<u>% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important</u>					<u>Total # of respondents</u>
Creativity						
< college degree	1	2	3	4	5	18
	0.00	0.00	5.56	33.33	61.11	
Bachelor degree of higher	0.00	2.33	16.28	55.81	25.58	<u>43</u>
Total						61
Public Speaking						
< college degree	1	2	3	4	5	18
	11.11	11.11	33.33	44.44	0.00	
Bachelor degree or higher	0.00	19.05	35.71	26.19	19.05	42
Missing Data						<u>1</u>
Total						61
*Other Communication Skills						
< college degree	1	2	3	4	5	18
	0.00	0.00	27.78	33.33	38.89	
Bachelor degree or higher	0.00	0.00	0.00	68.29	31.71	41
Missing Data						<u>2</u>
Total						61

N=61

*Other Communication Skills Include: Cultural Awareness, Team Management, and Personal

Table 2
 STATISTICS FOR NO TRAINING AND THE SKILLS CREATIVITY, FINANCIAL MANGEMENT,
 PROGRAM EVALUATION, INTERNET USAGE, AND TIME MANAGEMENT BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
	1	2	3	4	5	
Creativity						
No Training	0.00	0.00	0.00	0.00	100.00	4
Had Previous Training	0.00	1.75	14.04	52.63	31.58	57
Total						61
Financial Management						
No Training	0.00	25.00	0.00	75.00	0.00	57
Had Previous Training	0.00	1.75	8.77	43.86	45.61	4
Total						61
Program Evaluation						
No Training	0.00	25.00	75.00	0.00	0.00	57
Had Previous Training	0.00	1.75	26.32	50.88	21.05	4
Total						61
Listening						
No Training	0.00	0.00	25.00	0.00	75.00	56
Had previous Training	0.00	0.00	1.79	23.21	75.00	4
Missing Data						1
Total						61
Internet Usage						
No Training	0.00	0.00	0.00	0.00	100.00	3
Had Previous Training	3.57	8.93	28.57	39.29	19.64	56
Missing Data						2
Total						61
Time Management Software						
No Training	66.67	0.00	33.33	0.00	0.00	3
Had Previous Training	10.71	23.21	39.29	25.00	1.79	56
Missing Data						2
Total						61

N=61

Table 3
 STATISTICS FOR ON THE JOB TRAINING AND THE SKILLS
 DELEGATION, PUBLIC SPEAKING, VERBAL, POLITICAL/LLEGAL ISSUES, AND E-MAIL, BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
	1	2	3	4	5	
Delegation						
No On the Job Training	0.00	18.18	18.18	45.45	18.18	11
Had Previous On the Job Training	0.00	2.00	40.00	46.00	12.00	50
Total						61
Public Speaking						
No On the Job Training	9.09	18.18	18.18	18.18	36.36	11
Had Previous On the Job Training	2.04	16.33	38.78	34.69	8.16	49
Missing Data						1
Total						61
Verbal						
No On the Job Training	0.00	0.00	18.18	45.45	36.36	11
Had Previous On the Job Training	0.00	0.00	2.04	63.27	34.69	49
Missing Data						1
Total						61
Political/Legal Issues						
No On the Job Training	0.00	9.09	27.27	27.27	36.36	11
Had Previous On the Job Training	2.04	12.24	38.78	42.86	4.08	49
Missing Data						1
Total						61
E-mail						
No On the Job Training	0.00	20.00	10.00	10.00	60.00	10
Had Previous On the Job Training	0.00	0.00	28.57	40.82	30.61	49
Missing Data						2
Total						61

N=61

Table 4
 STATISTICS FOR FORMAL CLASS OR COURSE AND THE SKILLS
 STRATEGIC PLANNING AND MULTI-MEDIA EQUIPMENT, BY ROW PERCENTAGES

<u>Skill</u>	<u>% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important</u>					<u>Total # of respondents</u>
Strategic Planning						
No Formal Class or Course	1	2	3	4	5	
	0.00	2.86	31.43	42.86	22.86	35
Had Previous Formal Class or Course	3.85	0.00	3.85	53.85	38.46	<u>26</u>
Total						61
Multi-media Equipment						
No Formal Class or Course	1	2	3	4	5	
	0.00	14.71	35.29	44.12	5.88	34
Had Previous Formal Class or Course	4.00	12.00	16.00	40.00	28.00	25
Missing Data						<u>2</u>
Total						61

N=61

Table 5
 STATISTICS TYPES OF MEETING PLANNED - CONFERENCES AND THE SKILLS
 PROCESS MANAGEMENT, OTHER COMMUNICATION SKILLS, KNOWLEDGE OF THE INDUSTRY, BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
	1	2	3	4	5	
Process Management						
Plans Conferences	0.00	2.04	14.29	44.90	38.78	49
Does not Plan Conferences	0.00	0.00	45.45	18.18	36.36	11
Missing Data						<u>1</u>
Total						61
*Other Communication Skills						
Plans Conferences	0.00	0.00	4.17	58.33	37.50	48
Does not Plan Conferences	0.00	0.00	27.27	54.55	18.18	11
Missing Data						<u>2</u>
Total						61
Knowledge of the Industry						
Plans Conferences	0.00	0.00	8.16	18.37	73.47	49
Does not Plan Conferences	0.00	0.00	9.09	72.73	18.18	11
Missing Data						<u>1</u>
Total						61

N=61

*Other Communication Skills Include. Cultural Awareness, Team Management, and Personal

Table 7
 STATISTICS TYPES OF MEETING PLANNED -SPECIAL EVENTS AND THE SKILLS
 CRISIS MANGAEMENT, TIME MANAGEMENT SOFTWARE, , BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
	1	2	3	4	5	
Crisis Management						
Plans Special Events	0.00	2.56	0.00	41.03	56.41	39
Does not Plan Special Events	0.00	0.00	13.64	9.09	77.27	22
Total						61
Time Management Software						
Plans Special Events	18.42	13.16	44.74	23.68	0.00	38
Does not Plan Special Events	4.76	38.10	28.57	23.81	4.76	21
Missing Data						2
Total						61

N=61

Table 8
 STATISTICS TYPES OF MEETING PLANNED - WORKSHOPS AND THE SKILLS
 FINANCIAL MANAGEMENT, MARKETING, PROCESS MANGEMENT,
 PUBLIC SPEAKING, AND OTHER COMMUNICATION SKILLS, BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
Financial Management						
Plans Workshops	1	2	3	4	5	
	0.00	0.00	13.16	42.11	44.74	38
Does not Plan Workshops	0.00	8.70	0.00	52.17	39.13	23
Total						61
Marketing						
Plans Workshops	1	2	3	4	5	
	0.00	2.63	21.05	55.23	21.05	38
Does not Plan Workshops	8.70	13.04	17.39	26.09	34.78	23
Total						61
Process Management						
Plans Workshops	1	2	3	4	5	
	0.00	0.00	21.05	28.95	50.00	38
Does not Plan Workshops	0.00	4.55	18.18	59.09	18.18	22
Missing Data						1
Total						61
Public Speaking						
Plans Workshops	1	2	3	4	5	
	2.70	13.51	48.65	27.03	8.11	37
Does not Plan Workshops	4.35	21.74	13.04	39.13	21.74	23
Missing Data						1
Total						61
*Other Communication Skills						
Plans Workshops	1	2	3	4	5	
	0.00	0.00	2.78	69.44	27.78	36
Does not Plan Workshops	0.00	0.00	17.39	39.13	43.48	23
Missing Data						2
Total						61

N=61

*Other Communication Skills Include: Cultural Awareness, Team Management, and Personal

Table 9
 STATISTICS FOR *OTHER TYPES OF MEETING PLANNED AND THE SKILLS
 STRATEGIC PLANNING, PUBLIC SPEAKING, RESEARCH, AND SPREADSHEET, BY ROW PERCENTAGES

Skill	% Ranking on 5 point Likert-type scale of Least=1 to Most=5 Important					Total # of respondents
	1	2	3	4	5	
Strategic Planning						
Plans *Other Types of Meetings	4.00	0.00	20.00	32.00	44.00	25
Does not Plan Other Types of Meetings	0.00	3.03	18.18	60.61	18.18	33
Missing Data						3
Total						61
Public Speaking						
Plans *Other Types of Meetings	8.3.3	12.50	50.00	12.50	16.67	24
Does not Plan *Other Types of Meetings	0.00	18.18	24.24	45.45	12.12	33
Missing Data						4
Total						61
Research						
Plans *Other Types of Meetings	8.33	8.33	16.67	50.00	16.67	24
Does not Plan *Other Types of Meetings	0.00	12.12	51.52	27.27	9.09	33
Missing Data						4
Total						61
Spreadsheet						
Plans *Other Types of Meetings	0.00	16.67	20.83	29.17	33.33	24
Does not Plan *Other Types of Meetings	0.00	6.25	37.50	43.75	12.50	32
Missing Data						5
Total						61

N=61

*Other Types of Meetings include: Festivals, Board of Directors, Committee, Incentives, Regional Sales, Golf Tournaments, Executive Manager Meetings, Media and Educational Programs, Training Seminars, and Ceremonial.

VITA

Sarah C. Bryant

Candidate for the Degree of

Master of Science

Thesis: DETERMINING SKILLS NECESSARY FOR MEETING PLANNERS

Major Field: Hospitality Administration

Biographical:

Personal Data:

Born in Pawnee, Oklahoma, March 27, 1974, daughter of Johnny and Janice Bryant.

Education:

Graduated from Pawnee High School, Pawnee, Oklahoma, May, 1992; received a Bachelor of Science degree in Hotel Administration from Oklahoma State University in Stillwater, Oklahoma, in July, 1996; completed the requirements for the Master of Science degree with a major in Hospitality Administration at Oklahoma State University in December, 1998.

Professional Experience: Internship, Southern Hospitality, Inc. summer, 1995; Membership Services Assistant, Oklahoma Restaurant Association, summer, 1996; Graduate Coordinator, Fall 1996 and Spring 1997; Coordinator of Extension Programs, University Extension, International & Economic Development, July 1997 to present.

Professional Organizations: Meeting Professionals International; University Continuing Education Association