



Meetings & Events Australia

**AN INDUSTRY GUIDE FOR THE PROFESSIONAL
MANAGEMENT OF CONFERENCES, MEETINGS & EVENTS**

How to get
the best out
of your next
meeting or event



INDUSTRY GUIDE

MEA is nationally supported by: American Express Establishment Services; AIME; Brisbane Convention & Exhibition Centre; Cairns Convention Centre; Melbourne Exhibition & Convention Centre; Sydney Convention & Exhibition Centre and Qantas.

MEA is an industry association representing the Meetings, Conventions & Business Events Industry.

The planning and management of a conference will inevitably consume considerable quantities of an organisation's two most precious resources – time and people.

You need to ask yourself a number of important questions:

- Can you afford to commit the valuable time of you and your team?
- Would your time and energy be better spent on running the conference or on other aspects of your organisation?
- Do you have the expertise to achieve all of the desired outcomes?
- Has your conference often met its budgetary and strategic objectives?
- Are the attendees at the event, and the organisation in general, often satisfied with the outcome?

If your answer to any of these questions is "No" then help is available through expert assistance from Meetings Management companies.

[who are the experts?]

Meetings managers are experts who, as part of their core business, are skilled in the management of meetings, conferences and events. They have chosen this as their profession.

"Meetings Managers" are also known around the world as:

- professional conference organisers
- conference managers
- meeting planners
- event managers
- special projects managers
- meetings & events management companies

This brochure provides information on meetings managers and the accreditation scheme which covers them. In particular, we address:

- What is the Role of a Meetings Manager?
- Are Meetings Managers bound by Professional Regulation?
- What Training is Available?
- Can Meetings Managers be Accredited?
- Benefits of using Accredited Members?
- Industry Recognition Program?
- What Does a Meetings Manager Do?
- How Do I Choose a Meetings Manager?
- How Do I Brief a Meetings Manager?
- What should be Included in Contracts Between the Client & Meetings Manager?
- How Do Meetings Managers Charge for Their Services?
- Are Meetings Managers Entitled to Accept Commissions?
- MEA Code of Ethics
- Where Do I Go for Further Information?

[what is the role of a meetings manager?]

Requirements for the services of a meetings manager will generally depend on the size and complexity of the meeting/event, and the level of in-house expertise.

To effectively brief a meetings manager, the committee or executive responsible for the meeting should provide a clear statement of its objectives, together with a succinct list of services required. A history of the meeting/event is also helpful if available.

The most successful approach to organising a meeting is to clearly define the role of the meetings manager in relation to the organising committee or client body.

Generally, the conference committee is most effective if it acts as the policy maker, setting the objectives for the meeting, the goals and parameters, preparing the program content, monitoring progress, making contacts, and acting on recommendations from the meetings manager.

The meetings manager is then the executive arm of the conference committee, converting decisions into action, keeping the project on schedule and on budget, reporting to the committee, offering consultative expertise and coordinating suppliers.



[are meetings managers bound by professional regulation?]

Although there are no educational or legal requirements for meetings managers to comply with, in order to establish themselves and advertise as a meetings/conference/event manager, the industry itself has invested strongly in professional development. Meetings and Events Australia (MEA) has implemented an accreditation scheme on behalf of its members known as the Accreditation for Meetings Managers.

Also in view of the growth of the hospitality and event management sectors, many university, TAFE, and private colleges have designed courses both full and part time, either providing degrees, diplomas or certificates, in industry specific sectors.

[what training is available?]

Meetings and Events Australia represents all sectors of the industry, including meetings managers. MEA offers a structured training and education program for both new and experienced members of the industry wishing to develop or upgrade their skills in meetings or event management. The programs include specialist residential courses on meetings management as well as its "Essentials" one-day program which aims to equip participants with a basic understanding of the systems and procedures required in the management of meetings.

[can meetings managers be accredited?]

MEA offers the only specialist accreditation for meetings managers in Australia, based on experience, professional standing and ongoing training, assessment task and interview.

AMM (Accredited Meetings Manager) – a specialist accreditation directed at meetings/conference/event managers.



AIMM (Accredited In-House Meetings Manager) – a specialist accreditation directed at meetings/conference/event managers working within corporations and associations.



All accredited individual members must re-apply every three years, showing proof of ongoing training and references. A full list of accredited members can be obtained from the MEA National Office or on the website www.meetingsevents.com.au.

AMMC (Accredited Meetings Management Company) is currently being developed at the request of members. The criteria will follow a strict set of guidelines including company and staffing processes and requirements.

[benefits of using accredited members]

The individual process (AMM & AIMM) is one of rigorous peer review involving competency assessment, interview and client references. AMMs need to display a strong capability in all areas of meetings management such as budgeting, planning, project management, sponsorship and client support. AIMMs also need to display a strong capability in these areas with less emphasis on extensive budgeting and sponsorship processes. Ideally, when looking for a meetings manager it is a strong indication of their ability to handle the job if they have obtained industry accreditation. **MEA highly recommends the use of Accredited Members.**

[what does a meetings manager do?]

Although you may not need all of their services, you can expect a good meetings manager to deliver or coordinate the following services:

A. VENUE

- Research and recommend the venue.
- Negotiate favourable rates and conditions with the venue.
- Book and manage appropriate space and equipment in the venue.
- Coordinate venue personnel and external meeting/event suppliers' requirements.
- Coordinate food and beverage requirements.
- Manage venue operations on site.

B. PROGRAM

- (i) **Business**
 - Assist with the planning of the business programs/agendas.
 - Advise on effective program structures.
 - Prepare the schedule for the program.
- (ii) **Social**
 - Assist in devising suitable social events to coincide with the business agenda.
 - Coordinate partners/associates/family programs.
 - Coordinate special events – e.g. opening ceremonies, dinners, themed events.

C. SPEAKERS

- Coordinate "Call for Papers" from prospective delegates.
- Assist in the selection of suitable speakers for business sessions.
- Book and negotiate fees through speakers' agencies where required.
- Liaise with speakers regarding travel, accommodation, audio visual requirements and other production support for their presentations.
- Recruit and collate papers from speakers for the Book of Abstracts and/or Proceedings.

D. CONFERENCE MARKETING

- Assist with developing the conference theme and logo.
- Develop Marketing Plan.
- Coordinate design, production and distribution of all conference brochures, programs, and other printed material – e.g. Invitations, badges, menus.
- Procure all conference accessories – e.g. satchels, caps, t-shirts.

E. TOUR, TRAVEL, AIRLINES

- Arrange all pre and post tours and on-site transport.
- Book appropriate accommodation for all interstate/overseas delegates.
- Liaise with airlines on delegate travel.

F. MEETING/EVENT SUPPLIERS

- Supervise and coordinate all external suppliers.

G. EXHIBITION & SPONSORSHIP

- Manage and sell the trade exhibition or supervise a sub-contractor.
- Plan and implement a publicity campaign.
- Develop and implement a marketing plan.
- Prepare a sponsorship proposal and manage sponsor requirements.

H. ADMINISTRATION

- Provide fully equipped secretariat.
- Provide computerised registration and mailing list facilities.
- Arrange insurance at competitive rates.
- Coordinate interpretation services.
- Carry out all aspects of on-site management.
- Ensure all on-site staff are fully briefed and trained.
- Coordinate/manage all sub-contractors.
- Attend production management meetings with all relevant personnel.
- Carry out all post-event evaluation as required.
- Organise customs clearance.

I. BUDGET AND CASH FLOW

- Prepare budget according to client brief for approval.
- Prepare appropriate cash flow chart for client approval.
- Monitor, prepare and present regular budget updates to client.
- Prepare final costs and budget report post-event.

J. PRODUCTION

- Supervise and manage all external production personnel.
- Manage overall staging and audio visual production to ensure it integrates into the business and social programs.

K. PROJECT MANAGEMENT

- Devise a conference action plan.
- Prepare and monitor a Critical Path Plan.
- Prepare and monitor a Marketing Plan.

L. TECHNOLOGY

- Coordinate the design and establishment of a website.
- Coordinate and manage on-line registration.
- Set up an e-mail account.
- Coordinate incoming and outgoing e-mail.
- Arrange video conference links.

[industry **recognition** program – associate-fellow of MEA]

The status of Associate-Fellow is a distinctive recognition open to all MEA members. This status indicates the member has proven dedication to the industry and its Association and to ensuring their skills and knowledge remain current through on-going professional development. MEA is proud to recognise Associate-Fellows as significant industry achievers. It is important to note that Associate-Fellow status is not a form of accreditation.

[how do I **choose** a meetings manager?]

Before approaching a meetings manager, the host organisation should complete the following steps as a minimum:

- Define the goals and objectives of the event.
- Complete a brief history of the event and delegate profile.
- Establish the conference committee.
- Establish the theme of the conference.
- Decide on possible locations (not necessarily the venue) and duration of the meeting.

The criteria for selection of a meeting manager should include the following points, although not all will deserve the same weighting:

- Verifiable referrals from clients and suppliers of the meetings manager.
- Evidence of active participation in relevant professional organisations e.g. MEA.
- Industry accreditation i.e. AMM, AIMM.
- Evidence of competence in budgeting, cost control and financial management.
- Details of the guarantees offered in the contract.
- Evidence of a dedicated computerised support system, adequate office resources, and experienced support personnel.
- Evidence of quality management procedures in business.
- Demonstrated inter-personal and communication skills.
- Evidence of marketing skills in boosting delegate attendance.
- Examples of past conference work.
- Professional indemnity insurance.
- Notification of any conflicting business.

One other, less tangible factor that in the end can be critical to the success of a conference, is the “style and personality” of the meetings manager. Working with a committee over a long period of time takes special skills. The meetings manager must be diplomatic yet firm; efficient yet flexible; pro-active yet accommodating; creative yet practical. The meetings manager must be able to translate the vision of the committee into reality within the constraints of the budget.

Often, a useful way to judge these attributes is to meet with the meetings manager in a more informal setting or to visit the meetings manager at their business office.

In short, a good meetings manager is similar to a good project manager. This involves many different skills and an ability to coordinate a multi-faceted job to produce the required result.

[how do I **brief** a meetings manager?]

The document outlining the project brief for the meetings manager will depend to a certain extent on the services required, however, a typical brief should include wherever possible:

- **Background of the host organisation(s)**
- **Name of the event**
- **Objectives of the event**
- **Proposed dates**
- **Preferred location**
- **Theme**
- **Accommodation requirements – venue category required**
- **Anticipated attendance number and destination of origins of delegates**
- **Status of the event**
international | national | regional | state | other
- **Type of event**
congress | symposia | conference | meeting | corporate | association | government | exhibition | other
- **Frequency of the event**
inaugural | annual | biennial | one-off event | other
- **Program format**
number of days | plenary | concurrent sessions (how many each day) | poster sessions (how many to allow for) | roundtable discussion groups | workshops | associated tours/fieldtrips | pre and post tours | pre or post workshops
- **Speakers**
total number of speakers (including both invited/keynote speakers and those who proffer papers) | number of invited speakers | where they will come from | speaker entitlements | other speakers
- **Call for Papers**
interpretation required
- **Social Program**
number of social events | types of events | Accompanying persons program (expected number of accompanying persons)
- **Funding**
government | corporation | industry | sponsorship | registration fees | details of underwriters
- **Finance – budget and procedures**
- **Marketing and promotion needs**
- **Any other special requirements unique to the event**
- **History of the event (if held before)**
previous locations | breakdown of attendees (full registrations, day registrations, accompanying persons, home port of delegates) | registration fees | sponsorship raised | number of exhibitors | any unusual aspects of recent previous events
- **List of services required from a meetings manager**
(see the Role of a Meetings Manager for guidelines)

It is recognised that all the above information may not be known or to hand at the time of seeking a meetings manager, or relevant to a specific meeting/event.

[contracts between the client and meetings manager]

This is a checklist of items to be considered in the preparation of a contract between the host organisation for a meeting/event and the meetings manager. It may be used as a guideline to brief a solicitor to prepare a contract (if required).

PARTIES TO THE CONTRACT

- clear understanding on who are the parties to the contract
- who is authorised to sign
- company seal required
- description of event
- name of event
- dates

DESCRIPTION OF OBJECTIVE/SERVICES

- what is the service to be provided
- appendix of complete list of services & responsibilities of the meetings manager (probably extracted from a proposal with some modification)
- appendix of complete list of client responsibilities
- period of contract
- objectives of the event/conference – KPI Key performance indicators set

CONFIDENTIALITY

- confidentiality of contract
- confidentiality of client information
- confidentiality of material generated not in public domain

INSURANCE

- conference/event insurance required to cover liability and expenses of the event
- professional indemnity

TERMINATION OF CONTRACT

- notice of termination
- method of termination
- fees and expenses payable
- grounds for termination by either party
- material to be returned to each party

NON-PERFORMANCE

- procedures for notification
- penalties

FINANCE

- operation of trust account or client bank account
- fee payment schedule
- commissions declared by the meetings manager

RECORD KEEPING

- accounts for audit
- progress reports
- reporting format
- reporting periods

DISPUTE RESOLUTION

- procedures
- party nominated to adjudicate

PROFESSIONAL STANDARDS & ETHICS

- definition of procedures, standards
- conform to MEA ethics
- client performance standards

ASSIGNMENT OF CONTRACT

- ability to assign
- procedures

ADDITIONAL SERVICES & CONTRACT VARIATIONS

- procedure for work outside original contract
- procedure for reduction in services to be provided

COMPLETION OF CONTRACT

- procedure for agreeing that the work has been completed according to the contract

CONFLICTS OF INTEREST & ABILITY TO PERFORM

- procedure for advising of conflicts of interest
- procedure for advising if meetings manager will have difficulty in completing the contract

[how do meetings managers charge for their services?]

The method of charging for management services does vary within the industry. Some meetings managers charge a flat management fee that includes registration services. Others charge a management fee plus a per capita registration/secretarial fee. For association meetings, all expenses such as postage, printing, travel, on-site staff, telephone, fax and couriers are usually costed into the conference budget and charged by the meetings manager on a monthly basis in arrears. For some events a meetings manager will quote an all-inclusive fee. Some will charge a percentage of the total conference budget. It may be appropriate to negotiate a profit sharing arrangement, allowing the meetings manager a greater opportunity to increase revenue offset against a reduced up-front fee or a more lenient payment schedule.

Fees for organising exhibitions held in conjunction with conferences, or sourcing and negotiating sponsorship deals, are most often separate from the conference or meetings management fee.

They may be quoted as a set fee, or may be negotiated as a percentage of the exhibition or sponsorship revenue earned.

[commissions]

Some meetings managers accept commissions from suppliers. If so, in line with industry ethical practice and because most meetings managers act as “agents” on behalf of a client, they should not be accepting hidden commissions on any goods or services related to that work for which the person has been engaged – for example, hotel accommodation, audio-visual equipment/labour, satchels, name tags, etc. All commissions should be declared to the client. The supplier is encouraged to clearly state commissions on all relevant documentation e.g. contracts, invoices.

Hotel accommodation: meetings managers are often required to handle block bookings of accommodation for hotels. This may not only be for the conference venue but also for a range of accommodation venues offered to delegates. There is a considerable amount of work entailed in performing this function and liaising with the hotels on behalf of delegates. In return, the hotel will often offer the meetings manager a “fee for service” for coordinating this task. This is usually a percentage based on the number of room/nights booked.

Clients are advised to always clarify the meetings manager’s policy on commissions.

[code of ethics]

Every member of MEA pledges to abide by the industry's Code of Ethics which reads as follows: Each member shall conduct their business with integrity and in an ethical manner to earn and maintain the confidence of clients, colleagues, employers, employees and the public.

ARTICLE 1

Members shall pursue and maintain high standards of personal and professional conduct, and:

- Comply with the laws of Australia or of the country in which work is being performed and operate within the spirit of those laws.
- Ensure that all contracts and/or terms of business are clear, concise and are honoured in full unless terminated or modified by mutual agreement.
- Maintain skills through commitment to continued professional development and encourage colleagues to do the same.
- Uphold at all times the standing of the Association, our Industry and its Code of Ethics and actively encourage colleagues to do the same.
- Act honestly and fairly in all business dealings.
- Uphold high standards of corporate governance, and adopt terms of trade that would enhance the reputation of the industry as a sound, financially well-managed industry.
- Adopt risk management strategies, including the maintenance of appropriate insurance coverage so that all parties are not unreasonably exposed to risk.
- Shall not represent by use of the MEA logo or otherwise that their product or service is endorsed by MEA unless such endorsement agreement exists.
- Cooperate with any inquiry conducted by MEA to resolve any dispute involving consumers or another member.

ARTICLE 2

In their relationships with clients or customers, members shall:

- Where a principal/agent relationship exists, act as faithful agents in both professional and business matters.
- Advise them of any conflict of interest situation as it may occur or as it is perceived.
- Give professional opinion as objectively as possible when asked to do so and accept responsibility for advice given, actions taken and omissions.
- Declare any commissions, remuneration or additional benefit received from a third party that directly arises out of work performed for the client.
- Promptly respond to any client complaint about the service provided.

ARTICLE 3

In their relationships with employees and others, members shall:

- Protect the safety, health and welfare of employees and the public.
- Not disclose any confidential information without the specific consent of the provider of that information unless compelled by law.
- Not harm or attempt to harm, maliciously or recklessly, directly or indirectly, the professional reputation of others.
- Respect the privacy of others by distributing personal details only in circumstances that would be reasonably expected by the person, and by communicating with the person only when it is relevant to the circumstance that gave rise to the giving of the personal detail, or otherwise when permission is granted.
- Respect the intellectual property of others in the industry, particularly when ideas, creativity, and advice has been provided in good faith, but no agreement is in place to use such intellectual property.
- Make every effort to resolve complaints and grievances in good faith through reasonable direct communication and negotiation.

BREACH OF ETHICS

Any MEA member, client or third party (called the complainant) can bring to the attention of MEA a potential breach of the Code of Ethics. The following process applies for dealing with the allegation:

1. In the first instance, the complainant shall raise the allegation of a breach of the code of ethics in writing to the MEA Chief Executive Officer. The complainant needs to:
 - (i.) Outline the circumstances of the breach(s), providing as much information and evidence as possible to substantiate the complaint.
 - (ii.) State whether they wish their identity to remain confidential. In opting for confidentiality, it should be understood by the complainant that in some circumstances, such confidentiality might form a barrier to proper investigation.
2. The MEA CEO shall respond to the complainant explaining the process and seeking any further information, including whether other complainants may be involved.
3. The MEA CEO shall write in confidence to the member being the subject of the complaint, notifying them of the complaint and seeking an explanation for the alleged breach.
4. On recommendation of the CEO that the matter requires further investigation, the National Executive shall appoint a minimum of three and a maximum of five members of the National Council to act as the Disciplinary Tribunal to deal with any breach of ethics cases, and shall from that group appoint a Chair. The appointees to the Disciplinary Tribunal shall have no conflict of interest as a result of a business or other relationship with either the complainant or the member, nor shall they be in direct competition with either party.
5. Should the CEO recommend against further action, the complainant may write to the President to seek that the National Executive take the complaint further. If the National Executive decides to not take the complaint further, such a decision is final.
6. The Disciplinary Tribunal shall deal with the issue on a confidential basis. In their investigations, if appropriate to the circumstances, they can:
 - (i.) Seek further evidence from complainant, the member or other relevant parties.
 - (ii.) Decide that no further action is necessary.
 - (iii.) Call a meeting between the complainant and the member to seek to resolve the matter.
 - (iv.) Call a formal meeting with the member where the member has the opportunity to put their case forward.
 - (v.) Take advice on customary industry practice.
 - (vi.) Make recommendations to the National Executive on appropriate changes to the Industry's Code of Ethics, or if certain information and education strategies to the general membership are appropriate.
 - (vii.) Rule that there has been a breach(s) of the Code of Ethics and instigate an appropriate disciplinary response.
7. Options for the Disciplinary Tribunal if a breach is found are:
 - (i.) That the member be notified in writing that there has been a breach, and either giving a warning that should such a breach occur again, further action would be taken and/or stipulating that the member has been formally censured.
 - (ii.) That all MEA members be notified of the breach.
 - (iii.) Cancellation of membership.
8. Should the member disagree with the finding of the Disciplinary Tribunal, they may appeal to the full National Council for further consideration, and in so doing, state the grounds upon which the decision of the Tribunal shall be reconsidered.
9. The National Council shall act in accordance with Clause 19 of the MEA Constitution. Any decision of the National Council shall be final.

[where do I go for more information]

MEA will assist with contact names of meetings managers who are members, accredited members and associate-fellow members.

MEA publishes a comprehensive directory 'Who's Who in Meetings and Events' each year, which details members by products and services.

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