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

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

by

Virginia B. Phillips

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Education
Department of Adult, Career, and Higher Education
College of Education
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Keywords: Continuing Education, Adult Education,
Professional Meeting Planning, Associations, Conferences

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Dedication

This dissertation is dedicated to the many wonderful meetings and event professionals with whom I have had the honor to work with in my 20 years in this industry. I have learned from my colleague meeting planners, suppliers, and the associations that provide education and networking. They are the backbone of this industry. Most meetings professionals do not start with a degree in this field. Indeed, there are few degrees targeted to this profession, so we learn from each other. Without my colleagues it would have been a much more difficult road. I further dedicate this study to encouraging more practice research in this very large industry that supports learning – and represents big business, especially in associations that serve the continuing learning needs of their members. It is time to begin to count what we do, and be counted.
Acknowledgements

It is with humble gratitude I offer special thanks to my advisor and committee chair, Dr. William H. Young, who has patiently guided my study and research. At the beginning of this journey, I practiced only conference planning and he opened the wide world of continuing professional education with its complexity and challenges for me. The insights he provided in the not-for- as well as for-credit sectors, provided a breadth and depth of understanding. He practices adult education at its finest, recruiting students from the field so that we can learn from each other. He is a wonderful coach.

Dr. Richard A. Krueger introduced me to the world of focus group research many years ago when he served as a guest faculty in the University of South Florida Social Marketing Field School. As a meeting planner for that annual conference, I proofed many speakers' project descriptions and became intrigued with this very interactive and personal way to learn about people, what they do and how they think. Dr. Krueger literally wrote the book on focus group research and I was privileged to take the class, learn from the master, and have his guidance and support in this project.

Dr. Kathryn Borman very kindly agreed to serve on my committee and to help me understand and apply good qualitative research methods. And Dr. Rosemary Closson has long been dedicated to adult education programming as a field of study. I appreciate the knowledge and insights both committee members shared so freely with me.

Ms. Dina Vann, fellow MPI member, professional transcriptionist, and meeting planner herself, took incredibly accurate real-time notes. Her professionalism and accuracy were exceptional. I also wish to thank Lisa Klos for hours of careful proofreading.
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Abstract

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

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

The theoretical framework for this project was that scholarly-derived program planning models offer guidance to association CPE program planners, but we don’t know which elements of those frameworks are actually applied in practice. Utilizing a constructivist orientation, the study employed the elements of grounded theory to identify key concepts emerging from an analysis of 181 elements identified among all eight focus group discussions. Two overarching categories of elements emerged: CPE related elements and business-related elements, each with multiple sub-elements. An element was identified that related to both CPE and business and this was the third overarching category, venue. These were compared with the ten models from the literature and each
element could be described as strongly supported, supported, or not supported in the scholarly models. Six elements were strongly supported, eight elements were supported, and nine elements were not supported. Only two elements in the literature did not appear in the research group-derived list. These were ethics, which perhaps could be envisioned as an element of professional practice rather than program planning, and a set of three elements that seemed precursors to formative evaluation.

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

The literature review also included issues of change, diffusion of innovations and association literature derived information on strategic planning in associations. Findings supported the idea that change, in and of itself, had an impact as expressed by participants and technological change itself may have influenced the identification of a number of elements not represented in the literature. Additionally, the element identifying mission, had support in the association literature.
This project studied actual practice to understand it better in light of the literature of adult education program models. The subject pool was very narrow and the results of this research cannot be generalized. The findings, while partially represented in the literature, fit no single previous model. The most important implications of this study may be to provide insight into adult education in CPE association conference application. There is very little data on continuing professional education in the arena of CPE as practiced in associations, but such practice involves the continuing education of a very large number of adults and represents big business for associations.
Chapter One – Introduction

Associations often serve their members with educational services and products. One of those products is likely to include one or more conferences that have as a primary intent the educational purpose of imparting knowledge and information of relevance to the association member. A second intent is likely that the program generate income for the association. Continuing Professional Education (CPE) in associations therefore represent two intents: adult education and association CPE business.

This study is based in personal experience in the practice of adult education in continuing professional education conferences. My interest in this subject stems from an introduction to adult education during my Master’s study but really started in earnest when hired into a continuing education position where I administered conferences at a university graduate school. During this time, the business side of adult education, an integral part of most programs of adult education, became a second area of study. Thus, I became a practitioner of both adult education and meeting planning. I learned the business of meeting planning by attending CPE through professional meeting planner associations’ educational conferences. I became active on the board of the local chapter and eventually planned and implemented a five-day, non-credit certificate program in meeting and event planning. At this time I worked in non-credit, continuing workforce education in addition to responsibility for conference administration for university programs. After 16 years at the university I worked for a professional association as Director of Continuing Education and also opened my own small meeting planning business. Throughout all of this, I continued to belong to the meeting planning associations as well as university continuing education associations. It was very
surprising to me that with rare exception, university conference planners did not also belong to the meeting planning associations and vice versa. The missions seem to be parallel, but the practice was segregated. I had learned much from each type of association and that learning benefitted the programs I served.

One of the most curious findings that became evident as I then studied adult education was that meeting planning associations and the adult education literature on program planning were disconnected, and that there was almost no research to determine what of the theoretical literature was actually practiced. All of this has led to this subject for this dissertation. Of all the advice on how to plan adult education, in this instance in CPE in the form of conferences, what do practitioners actually do?

This study thus first examines the adult education scholarly literature related to program planning and describe major program planning models. While there is a considerable amount of theorizing and scholarly insight, it also seems that there is very little research asking what adult education planners actually do in practice, and virtually no research involving CPE planning in associations.

The study then considers the association business of CPE, substantiating that it serves a very large number of adults and that it is a huge financial enterprise. This study is limited to CPE as practiced by Certified Meeting Professionals (CMP) or those holding a Certificate in Meetings Management (CMM) working in an association model.

There are two other areas of knowledge that may further inform this research. Bridging the threshold of program models as a single topic and association-derived knowledge as another is a study conducted by the American Society of Association Executives & The Center for Association Leadership which describes research-based success strategies for associations. Since this study focuses on association CPE programs, some of the factors in this study could be considered planning elements akin to the scholarly program planning models. This study is described and included. Further
the impact of the professionalizing process on the association presented by Houle (1980) is included in the literature review. That is, perhaps an older more professionalized association may approach program planning differently, or utilize different elements than a younger association. It is not known if this will arise in the research findings, but it is prudent to consider the possibility.

The theoretical framework for this project is that scholarly-derived program planning models offer guidance to association CPE program planners, but we don’t know which elements of those frameworks are actually applied in practice. The study employs the elements of grounded theory to identify key concepts\(^1\) that emerge through analysis of focus group discussions among association conference planners. This qualitative research used a constructivist orientation. He small number of participants makes the results no generalizable, but it is hoped that findings might help identify which elements are utilized, which are not employed, or if there are others not yet identified. Further, by its design it seeks to determine if some practice elements are deemed more important than others in practice.

To summarize, this is practice research that employs the scholarly literature as a framework for investigation. Following in this introduction are the purpose of the study, research questions, persuasive arguments for the need for this research, the project’s assumptions, limitations, and definitions utilized. Chapter Two provides a targeted literature review, and Chapter Three describes the research methodology. Chapter Four details the findings, and Chapter Five addresses conclusions, implications and recommendations for further research.

\(^1\) For understanding by research subjects, this will be termed “elements of program planning” in order to be understood by research subjects in their every-day language.
Statement of the Problem

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

Purpose of the Study

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

Research Questions

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

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

This study will focus exclusively on continuing professional education conferences. Understanding each of the following definitions is crucial to this study. The first definition is that of adult education, and for that we use the one offered by Merriam and Brockett, “We define adult education as activities intentionally designed for the purpose of bringing about learning among those whose age, social roles, or self-perception define them as adults” (1997, p. 8). Another definition important to this study includes Queeney’s definition of CPE.

Continuing professional education (CPE) refers to the education of professional practitioners, regardless of their practice setting, that follows their preparatory curriculum and extends their learning…throughout their careers. Ideally this education enables practitioners to keep abreast of new knowledge, maintain and enhance their competence, progress from beginning to mature practitioners, advance their careers through promotion and other job changes, and even move into different fields” (Queeney, 2000, p. 375 as quoted from Queeney, 1996, p. 698).

We also use Wills’ description of the annual conference.

The annual membership conference of an association exists to fulfill the mission of the organization. It represents a professional field or fields whose members are demographically diverse, but similar in their professional culture. The meeting serves to convey professional information between participants, and to transmit the culture of the organization. Volunteer leaders are central to the transmission of association culture by defining vision. Volunteer committee members and staff implement that vision through tangible programs (Wills, 2001, p. 105).
We assume that associations, also known as professional societies, are self-governing bodies with a hierarchy of member leaders and staff. It is unknown if associations are aware of the adult education scholarly literature which offers program planning guidance. There is popular “how to” literature published by various meetings-related associations. One example is *Associations and the Global Marketplace: Profiles of Success* (Svevo-Cianci, 1994) where Chapter 7, entitled *Conferences and Trade Shows*, lists tasks and processes or questions to consider, followed by case study examples of successful programs. Other resources abound and all include some elements similar to the scholarly literature. These include *Professional Meeting Management* (Connell, Chatfield-Taylor, & Collins, 2002), *Meetings and Conventions: A Planning Guide* (McLaurin & Wykes, 2003), and even *The Complete Idiot’s Guide® to Meeting and Event Planning* (Craven & Golabowski, 2001) all of which have elements that are also contained in the scholarly research, but do not reference it and thus seem disconnected. However, these are much more accessible and well known to practitioners in associations. This study is limited to those planning elements in the adult education literature presented the literature review.

It is reasonable to assume that associations likely plan conferences in a fashion derived from the time the society organized the first conference when the society was young. Decision making is very likely based primarily on what has worked in the past. While this may often be a relatively successful strategy, and the topics selected to be presented may be ones solicited either by input by association leaders or by survey of society members, processes may rely on a small group of staff and/or member volunteers making decisions.

There are few research examples in this area of study. In 1976 Pennington and Green compared program development processes in six professions using grounded theory to develop a model and recommended, “Research needs to be conducted that
will provide specific information about what clusters of planning activities are most
important to any program development effort...which consistently occur...are some more
important than others...[are there some] which cannot be neglected?” (1976, p. 22). To
date no study could be found that addressed these questions. Although relating to a
 corporate setting, Wortham concluded that, “Designers of program planning models from
the adult education perspective and practitioners on the job would do well to integrate
what they are doing” (1994, p. 6). No research found in this literature search resulted in
a study following this advice. In her article entitled, What is the State of Adult Education
Today, Rose says, “Looking through American adult education journals, one is struck by
the emphasis on reflection and theory and the seeming retreat from the use of data, in
any form at all” (2000, p. 28). Of the two dissertations found that directly relate to this
proposed research Wills (2001) in The Study of the Process by Which Professional
Associations Plan the Technical Program for Their Annual Membership Conference,
concludes that one focus for future research should be on the process used to plan the
annual meeting program and events.

What is found is research addressing specific case examples for specific
programs. This research is almost all qualitative in nature and investigates the
application or interpretation of an approach within or across cases. A good example of
this is the Spring 1996 issue of New Directions for Adult and Continuing Education
where the focus was, “What Really Matters in Adult Education Program Planning:
Lessons in Negotiating Power and Interests” (Cervero & Wilson, 1996). In this issue,
case studies were presented where “a number of practitioners and researchers...used
the theoretical framework described in Planning Responsibly for Adult Education: A
Guide to Negotiating Power and Interests” (Cervero & Wilson, 1996, p. 1 , the quote)
and (Cervero & Wilson, 1994 , the book which is referenced in the quote).
Another article examined adult program planning literature from 1990 to 2003 and classified 25 sources as traditional, political/negotiation, or integrative, while concurrently also classifying each source by research methodology. It is the methodology analysis that is most interesting. Of the 25, only 10 were qualitative studies and the remaining 15 were theory-building (Cho & Kim, 1994). One wonders how practice can improve when theory-building overshadows research two-to-one in a practice field? Advice on “how to” seems to consistently overshadow “what is really done in practice.”

Let us agree that a major role of many professional associations or societies is continuing education generated and delivered by the association. If these groups then take on the challenge of “improving their [members’] knowledge, competence or performance” (Cervero, 1988, p. 25), then Association members are in a unique position because they are working in the field in which the content of their work lies. With the rate of change increasing at a seeming astronomical rate, it may be that associations, practiced at serving the education needs of their members, are in a unique position to determine what needs to be delivered through their educational channels to serve their members well. But, of all the possible topics, delivery methods, and quality how do associations make these decisions? Who makes them? (Cervero, 1988, p. 25).

What was true in 1988 seems to continue to be true today. Association CPE programs offer a rich area for adult education research which is here-to-for outside of most adult education investigation. In addition, it is big business.

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

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

Cervero (1988, p. 21) estimated that professionals numbered 27% of the workforce using 1986 census figures. Census data for 2002 (updated data are not yet available) indicates that there are almost 25,000 establishments whose definition would fall into the association / professional association descriptors addressed in this study. See Table 1: Census Data – Association Type Establishments.

This study addresses only live, on-site, and in-person continuing education in the form of conferences of one or more days in length. These programs are generally held at a contracted venue such as a hotel, conference or convention center and may attract from below one hundred to tens of thousands of participants. It is assumed that a registration fee is charged for attendance and that these educational projects represent both a sizable investment as well as important return on that investment (ROI) for the
sponsoring professional association. Professional associations are likely to consider such education events as major annual income sources in support of the association. As

Table 1: Census Data -- Association Type Establishments

<table>
<thead>
<tr>
<th></th>
<th>Code Definition</th>
<th>Number of Establishments</th>
<th>Receipts / Revenue ($1,000)</th>
<th>Annual Payroll ($1,000)</th>
<th>Number of Employees</th>
<th>Average Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>813310</td>
<td>Establishments owned by their members but organized to perform a specific business function, such as common marketing of crops, joint advertising, or buying cooperatives, are classified according to their primary activity [813910]</td>
<td>17,204</td>
<td>17,835,381</td>
<td>5,438,345</td>
<td>127,080</td>
<td>7.4</td>
</tr>
<tr>
<td>813920</td>
<td>Establishments primarily engaged in promoting the professional interests of their members and the profession as a whole are classified in Industry 813920, Professional Organizations</td>
<td>7,706</td>
<td>11,807,494</td>
<td>3,550,674</td>
<td>80,156</td>
<td>10.4</td>
</tr>
</tbody>
</table>

24,910 | 29,642,875 | 8,989,019 | 207,236 | 6.3 |

(U.S. Census Bureau, 2004; generated by Virginia Phillips; using American FactFinder; <http://factfinder.census.gov>; (20 August 2009).)

such, they carry a sizeable financial risk both in commitment (in terms of hotel and other contracts, as well as advance marketing costs), and for what residual funds generated may mean to the bottom line of the association. Continuing education is thus both high risk and a major income source for an association.

Very little is written regarding conference planning for associations, or for conferences hosted by educational institutions for that matter. The exception to this is in the field of medicine and allied medical sciences, especially nursing. A simple search on the University of South Florida Electronic Journal online database in late 2009 revealed the following: out of 5,371 hits for journals in health sciences, 655 included key words of medical education/training/research. Within health sciences, limiting to a search on the word education yielded 1,014 journals. When further limiting the search to
continuing+education+health, six journals were discovered listed to this combination of topics and included such titles as, *The Journal of Continuing Education in Nursing* and *Journal of Continuing Education in the Health Professions*. When changing the search to the Social Sciences, only one journal surfaced with particular emphasis on continuing+education and that was *New Directions for Adult and Continuing Education*. Clearly, the health sciences have paid more attention to the practice of continuing education than all of the social sciences combined.

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

What happens when a successful association conference begins to wane? The effort to produce such an event and the need for sustained return-on-investment (ROI) persists, but registrants stop coming in sufficient numbers. How does an association, likely operating in isolation, even begin to figure out what may need to be examined for change? Even more basic, associations may be quite unaware of what threats exist in
order to be watching for signs of trouble. While there is theoretical guidance and there are frameworks offered, these have not been tested by research.

One of the challenges facing CPE is competition and in 1983 Long foresaw that threats due to competition may increase over time. It is the author’s observation that associations arise to meet the needs of a particular group. Since meeting and discussing are one way to start the process, these groups evolve into associations and their missions advance to provide education for their constituency. Since the group originally evolved to meet a need not elsewhere served, it is likely that the first CPE events sponsored by that group attracted a sizeable registration. However, once the association meets with education success, especially financial success of its conferences, competition likely begins. This is the first threat and it is external.

A second threat may be internal. The conference planning process that worked well and attracted attendees in the beginning, now has to meet the evolving needs of a larger and more diverse audience. It is likely that the process is “this is the way we have always done it” and process change itself may be perceived as a threat to the culture and perhaps to the leadership. However, if the old ways are now less effective, the association may face diminishing returns on what may be a critical revenue stream. “…the longer an organization’s lifecycle, the more codified its procedures and regulations become” (Brager & Holloway, 1978, p. 10). The situation may have to become quite dire before analysis toward change is even considered.

A more recent threat to CPE in the form of conferences is competition from online learning opportunities which seem to grow every day and from multiple sources including universities, not-for-profit, and for-profit enterprises.

Continuing professional education conferences also tend to be high profile and represent the association’s stature to the professionals in that industry, and thus can impact the association’s ability to attract new members – a crucial goal in any
membership organization. Marketing of such conferences often entails extended mailing and emailing to non-members as well as press releases that may result in mentions in industry news outlets as well as general news media. Thus the financial risks – and rewards – are accompanied by similar reputational rewards among members and non-member professionals in a larger context. Continuing professional education conferences then represent considerable financial and reputational investment, all of which likely impacts the ability of the association to do its work for its members.

While professional associations may meet with their counterpart associations in association/association membership groups, or cooperatively plan educational programming, educational program development processes are very likely proprietary to the particular association. Yet, collaboration and partnerships present another complexity to CPE conference program decision-making (Donaldson & Kozoll, 1999; Mason & Young, 1993).

To summarize, associations plan many CPE programs in the form of conferences which bring both reputational and financial opportunities and challenges to the program planning table. Program planning is addressed in a variety of models offered in the adult program planning literature, but these seem to primarily represent theoretical analyses of what should work in practice, and precious little research data from practitioners as to what they utilize and consider important – if they are even aware of the theoretical options offered to them. This research addresses a small portion of the void by asking professional meeting planners, knowledgeable in association practice, questions about what they do and feel is most important in their program planning practice. One finding, important to understand before delving further into this research report, was the degree to which adult education practice and insight into adult learning, was quite limited as a finding. The implication of this reverberates through this research.
**Assumptions**

Professional societies and professional associations are one in the same for the purposes of this paper. They are most likely non-profit or not-for-profit and are self-governing, in all probability by a board of directors. It is further assumed that there are multiple groups such as staff and member volunteers involved in the decision-making regarding conference planning, although this investigation will only approach professional meeting planners as research subjects.

**Limitations**

The most important limitation of this study is that it cannot be generalized. It is qualitative research with a very small, select, purposeful sample. The results from this study should not be generalized to similar samples, because the sample size is so small.

The data analysis was conducted with one researcher analyzing the data. A larger review team may code or interpret differently. Additionally, the research questions were narrowly focused. The questions sought to determine what elements of program planning the participants utilized and which were the most important. A different group of subjects may identify different elements or rate their importance in another way. This research is a start, perhaps a first investigation of practice in this arena of adult education in CPE. As one investigation, it may provide insight; it will be up to the reader to determine if some of these findings may be able inform their question or situation.

The most important result of this study may not be definitional or generalizable, but it may help focus attention on the situation behind the research, that is, the intersection of adult education practice theory and actual practice. Definitions of practice terms arising from the research, while not generalizable, may suggest insights on how theory can better speak the language of practice, as well as better inform it.
Delimitations

The choice of topics for this study was informed by the practice of the researcher and limited to CPE as practiced in association conferencing. Further, it was limited to finding which elements participants actually use in practice, which may not include elements that they wish that they could include. Although this is a study grounded in adult and continuing education, it may be that the adult education elements an adult educator may anticipate (or hope to find) may not actually appear in practice. Actually this is one of the drivers for this study which is at the intersection of theory and practice. A notion underlying the formulation of the research questions is actually a hunch that what adult education assumes takes place in practice, may not. This is a delimiting factor – not assuming what theory would lead us to anticipate.

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

Professional planners selected for this study excluded those working in medicine, nursing, dentistry, pharmacy and psychology which have an extensive CPE literature base. Each of these groups represents a specialty in itself in that program requirements for accreditation mandate prescribed approaches. Further, recently medicine has applied a theoretical approach that is more in the behavioral tradition, seeking to effect practice change to the benefit of measurably improved patient outcomes. This is a different approach than the humanistic theoretical approach taken by most associations. In addition, the rich literature base on allied health-science CPE
programming has also been omitted as allied health programming is a CPE specialty in and of itself with many rules that reflect the specialty fields.

Definitions

Adult Education -- In associations, adult education is generally taken to mean applying what the staff member, or committee member leading the education decision making, understands as good practice. It is generally not based on theoretical adult education knowledge, but information received as an article on adult education, or an aspect of it, within the trade publications for meeting professionals or elsewhere. For meeting professionals, it is part of the body of knowledge required for the CMP certification exam. Topics in the manual studied for that exam address characteristics of adult learners such as self-direction and interactivity, that participants bring life experiences to the learning environment and a problem-oriented approach requiring relevant content. It further advises that it should cater to the age limitations of the participants! It addresses generational differences, styles, psychological factors and so on (Connell, 2002). The authors in this publication, with a few exceptions, do not represent what this researcher understands to be the recognized adult learning experts and some of the information, such as implied limitations on ability to learn centered on the age of the learner, are suspect.

Annual Conference -- In associations as well as other organizations, it is usual and customary to host an annual event to bring together the membership. This often includes business meetings of the organization but is very likely to also include continuing professional education opportunities.

Association -- This is a membership organization of individuals whose purpose is to serve the needs of its members in any number of ways. For this study, the most important feature is the stated purpose of serving members’ education needs and
includes at least one annual continuing education conference. Professional society is another name for an association.

*Association / Professional Association Type Establishments* – This is the description used to relate the Census definitions for sections 813910 and 813920 as the types of establishments most like the associations referred to in this study.

*Audio visual* – This concerns simple to complex support services for projection, microphones and sound systems. Often referred to by its acronym, AV, this could also include very large production efforts with lights, sound, mixers and projection walls, for instance.

*Breakout Sessions* – Another name for these would be concurrent sessions meaning that there are multiple events, usually education sessions, that are taking place simultaneously and of which only one can be attended at a time.

*Budget* – This refers to the funding plan for the organization’s conference and suggests a project budget rather than an organization’s overall budget.

*Certification in Meeting Management (CMM)* – “The mission of the Certification in Meeting Management (CMM) program is to select, educate, and certify management-level meeting and event professionals. The focus of the certification is to provide continuing educational enhancements to the strategic decision-making ability of these leaders to manage and deliver exceptional meetings and events that drive organizational success. Qualified candidates will be: management-level meeting and event professionals with a minimum of 10 years’ experience in the industry [and or] business leaders who have existing expertise in all aspects of meeting management” (Meeting Professionals International, 2011). There are over 500 professionals with this designation.

*Certified Meeting Professional (CMP)* – According to the Convention Industry Council, an association of associations in the meetings industry, the CMP is, “The
foremost certification of the meetings, conventions and exhibitions industry, the CMP program recognizes individuals who have achieved the industry’s highest standard of professionalism. Established in 1985, the CMP credential increases the proficiency of meeting professionals.” and “Through the CMP program, individuals who are employed in meeting management pursue continuing education, increase their industry involvement, and gain industry-wide recognition. The requirements for certification are based on professional experience and a written examination. Over 14,000 individuals in 36 countries and territories have earned the CMP designation since its inception” (2010).

**Conference** – A conference is an educational event marketed to an association’s membership as a whole or a particular sub-set of the whole (based most likely on topic or region) where attendance is a self-selected act and for which registration fees are required to attend. It is very likely longer than one day and may include plenary sessions, all breakout or concurrent sessions, or a combination of the two, as well as exhibits, business meetings, networking events, and possibly entertainment.

**Contingency** -- “A contingency is a relevant event anticipated by a planner, including low-probability events that would have major impacts on the success of a plan. If the event occurs, current actions and plans may be adversely affected” (Power, 2011).

**Continuing Education (CE)** – Learning that takes place after the initial, recognized achievement of the base level of competence to be admitted to jobs in any particular field.

**Continuing Professional Education (CPE)** – This refers to any organized effort offering education beyond entry-level type education, such as a bachelor’s degree, no matter whether the target group is an accepted profession or not in the literature.
It could be a training program, conference, or described by some other similar name. In this study, it will refer to organized education in the format of a conference.

*Continuing Professional Educators* – These are people working in the field of adult and continuing education that may or may not have expert training in the content of the field in which they practice.

*Corporate Social Responsibility (CSR)* – This is a fairly new concept and includes “giving back” by featuring and/or donating to a charity in the host city.

Engagement – Engagement in the adult education literature refers to active mental attendance with an educational opportunity. In an association conference, this might be paying active attention to a speaker during a session. However, there is another application of the notion of engagement and this has to do with the overall association and this is the way that engagement is utilized in the findings of this study. That is, is the person actively involved with the association, its mission, vision, goals and works? Does the person pay their dues to belong, do they come to events, do they participate on committees, do they talk to other members and by so doing, increase the business-to-business value of theirs and the other person’s membership? Often engagement is supported in association program design by incorporating networking opportunities for CPE attendees. Engagement in the association context does not imply learning, either formal or informal.

*Evaluation* – Evaluation refers to a questionnaire distributed to conference attendees where they are asked to provide feedback on the quality of the program. It may include suggestions for future improvement.
Green -- One example of “greening” a meeting is to no longer print programs or program books, but only publish the program on mobile devices, or only provide speaker slides electronically. It has to do with recycling and saving resources.

Logistics -- This could be considered a list of tactical things that are common to make any event happen. Logistics includes such things as food & beverage requirements, arranging transportation if needed, writing detailed hotel orders (what is to happen in each room of the program, each hour of each day such as ‘from 8:00 am to 10:00 am room X will be set for 100 participants, theater style, with a head table for four on risers, microphones’…). Logistics are rather the opposite of strategy and involve tactical elements.

Marketing and Communications -- This refers to a total plan to advertise an event which may include brochures, messaging details, value propositions for segmented audiences, internet and email marketing schedules, and may or may not include a social media approach. It may also include a range of communications efforts by association staff with individual members or constituent groups such as the Board of Directors or committees.

Meeting Planners -- For this definition we will use the occupational title from the Occupational Outlook Handbook for meeting and convention planners (SOC code 13-1121). “Meetings and conventions bring people together for a common purpose, and meeting and convention planners work to ensure that this purpose is achieved seamlessly. Planners coordinate every detail of meetings and conventions, from the speakers and meeting location to arranging for printed materials and audio-visual equipment” (Bureau of Labor Statistics, 2010-11).

Members -- People who pay a fee to belong to an association and whom the association purports to serve.
**Member Volunteers** – These are members of the organization who play a specific role in the organization and have responsibility for that assigned role. An example pertinent to this study would be a member who is a volunteer education committee member who contributes to decisions about continuing professional education conference programming.

**Networking** – This includes myriad efforts to provide opportunity for conference attendees to speak with one another for the purposes of business and to a lesser extent, knowledge transfer\(^2\). Networking is supported by incorporating breaks in the formal program, food and beverage breaks, time periods in an exhibit hall (with or without food and other events collocated there), and special events such as banquets, parties, visits to museums or sports events, and the like.

**Non-credit continuing education** – This refers to any post-entry-level formal education activity that requires some sort of registration and does not earn university credit hours towards a degree.

**Operations** – This refers to the ordered, project-managed series of steps necessary to create and hold a continuing professional education program and includes agenda design, audio visual support, room sets, and the like. This is rather the opposite of strategic.

**Outsourcing** - Most if not all conferences generate contracts with vendors and those vendors may include audio visual, transportation, destination, decorator, exhibit/tradeshow and similar types of support. These are likely sourced with formal or informal requests for proposals and are executed with negotiated, formal contracts.

\(^2\) In a research-to-practice conference, knowledge transfer may be more important than business purposes. However, research-to-practice conferences are a special type of conference and may not be the most common type.
Plenary Session – Another name for general session where all attendees are invited to participate.

Professions -- In an attempt to understand the adult learner, the theorists in adult education have pondered the need to define profession (Houle, 1980) and there is little agreement among adult education researchers as to what should be called a profession (Cervero, 1988). For the purposes of this research, a very loose interpretation will be accepted and include any association or group that considers itself so.

Professionals – Any person who considers themselves one.

Room Block – A room block is the total sum and pattern of sleeping rooms in a conference hotel contract. For a three-day conference of 1,000 participants it may look something like this: day before, 500 room nights, first and second night, 750 room nights each, third night 50 rooms for a total room block of 2,050 sleeping rooms.

Society or Professional Society – Synonymous with Association

Strategic – A strategic intent is one that bases decision-making on achieving particular goals. It is not concerned with tactical or operational goals or achievements. Strategic decisions in this study refer to those having to do with education content, financial success elements, as well as decisions regarding educational and practice outcomes related to the mission, values, etc., of an association.

Strategic Meetings Management (SMM) – More closely applied to corporate meeting planning where conferences and meetings are funded by the central source, SMM is a new industry term referring to a movement to centralize travel and meetings across the enterprise for fiscal and employee savings and efficiency. Association planners also refer to SMM, but it usually does not refer to as deep an application as in a corporation.
Tactical – See Operational.

Training – This is a type of continuing education, not addressed in this study, where a single instructor teaches one day or more on a specific topic.

Venue -- The location selected for a conference or convention, this may refer to a specific property such as a hotel, or may be used more widely to refer to a geographic location such as a city.

Organization of the Study

This study reviews the literature of adult education, program planning models in adult education, and discusses associations. Narrowing the field, the review next addresses continuing professional education and the people who plan CPE focusing on professional meeting planners. The mission, values, and goals, and other features that guide individual associations may surface in the focus groups and are briefly described.

The review of literature primarily focuses on select program planning models in the literature and then describes the results of two fairly recent qualitative case studies of CPE that specifically investigate CPE practice. Grounded theory is carefully reviewed as the theoretical base for the study. Qualitative research in form of focus groups is described, along with its pros and cons, leading to a description of its suitability for the type of inquiry proposed herein.

The methods section restates the purpose of this study and lists three specific research questions. The proposed research sample consists of professional meeting planners with experience in the field of association conferences. Data collection involves internet-supported focus groups with these research subjects. Limited and specific demographics have been collected for each participant. The goal is to determine what planning elements are utilized in practice and which elements are considered the most important.
Chapter Two -- Review of Literature

Introduction

This review of the literature first addresses adult education. This includes what we know about the adult learner, adult education philosophies, and providers. Following these topics, the review addresses program planning models in adult education and the role of associations in adult education.

Continuing Professional Education, or CPE, can refer to many types of adult education offered through a range of media, one of which is association conferencing. Association conferencing usually involves an educational effort, but is also a business enterprise with enormous financial implications for the sponsoring body.

Adult Education

“Defining adult education is akin to the proverbial elephant being described by five blind men: it depends on where you are standing and how you experience the phenomenon” (Merriam & Brockett, 1997, p. 3).

It is a HUGE field, so large that practitioners who work in the field may not recognize that they are part of a very large endeavor with rich research, theory, and practical guidance available. Adult education could be an art class in a museum, a yoga class in a park, a program on child development for new parents, a non-credit program in meeting and event planning, a certificate program in human resource management, an online course for- or not-for credit, an associate’s degree, a doctoral degree program, or any one of a thousand other examples. In a study of definitions of adult, continuing and professional education, 283 different ones were discovered (Anderson, 1992).

1 Figures 2 through 10 utilized in this literature review have been previously published and are used with the permission of the copyright holders as noted in Appendix L: Copyright Permissions.
The field of adult education is so large and pervasive that data of its depth, breadth, scope, offerings and participation are not kept in any sort of organized fashion across the field, or within more definable areas of practice, with perhaps the exception of adult basic or literacy education through school districts. When researching articles or conference proceedings in the area of adult education, the results provide titles that focus on the smallest elements or populations, and this may be because it is almost impossible to describe except in small chunks. Likewise, this study will investigate only a small segment of the field, namely adult education practiced in the setting of education conferences offered by associations.

Why do adult professionals pursue continuing education? “Once professionals leave their universities qualified to practice their profession, they find they must seek information outside those universities about how to actually implement their knowledge” (Young, 1998, p. xiii). Challenges facing professionals throughout their working life include not only new knowledge (either not learned before or actual new knowledge not before available), but increasing technical expertise and use of new tools, collaboration skills, and business expertise to successfully apply the knowledge in the business world, adapting to an ever-changing virtualization of the world, new aspects of diversity, and expertise in, and commitment to critical thinking, among others (Young, 1998). Simply put, “Continuing professional education is no longer a luxury but a necessity” (Bickham, 1998, p. 69).

The adult learner. An adult learner is “participating in a programme of education for adults, or someone pursuing a self-directed learning programme” (Jarvis, 2002, p. 5). In reviewing the literature, Merriam and Brocket (1997) basically came to the conclusion that if someone is old enough to be considered legally an adult, functions as an adult, and plays social roles that are identified with adults, then we may consider that
education in which they are involved to be adult education. They formally define, and this study will accept their definition of adult education as, “Activities intentionally designed for the purpose of bringing about learning among those whose age, social roles, or self-perception define them as adults” (Merriam & Brockett, 1997, p. 8).

**Philosophies of adult education.** Elias and Merriam (2005) summarize volumes and years of writing with an overview of philosophies of adult education. The following descriptions are taken from this summary in order to ensure a broad perspective of adult education that an association may hold. As the authors accurately point out, “The educator is generally more interested in skills than in principles, in means than in ends, in details than in the whole picture.” “Philosophies of education are interpretative theories, not applicatory theories…that one teaches with, not to students [italics quoted from the original]” (Elias & Merriam, 2005, p. 11).

The list below is a much abbreviated summary of the primary philosophies of adult education.

- **Liberal** adult education has as its emphasis organized learning and developing intellectual powers.

- **Progressive** adult education focuses on education and society, democracy, and tends to be experience-centered.

- **Behaviorist** adult education is more scientifically based and many would recognize behavior modification and management by objectives as part of this philosophy.

- **Humanistic** adult education includes “freedom and autonomy, trust, active cooperation and participation, and self-directed learning” (Elias & Merriam, 2005, p. 13). The andragogical approach is found in this theory (Malcolm Shepherd Knowles, 1984).
• **Radical or critical** adult education includes “…left-wing Freudianism, critical theory and radical feminism… [it is seen] as a force for achieving radical social change” (Elias & Merriam, 2005, p. 13).

• **Analytic** philosophies of adult education focus on clarification through discussion.

• **Postmodern** adult education questions fundamental concepts “casting doubts on many accepted truths” (Elias & Merriam, 2005, p. 14).

Putting theoretical approaches aside, adult education also tends to be a practical endeavor. Determining the philosophical premise of an association’s educational mission may be instructive as a means of better understanding underlying assumptions and goals. It is a reflective activity (Schon, 1983). Most of CPE practice that is addressed in this proposed study is likely to be in the humanistic tradition. However, the study itself in this proposed research is philosophically postmodern in that it challenges the concept that CPE offers quality adult education simply because it is being offered, and that planning utilizing frameworks offered in theory, actually are effective. It goes back to practice and asks what planning elements are actually utilized, and which of those are most effective.

**Learning theory.** While there are a number of learning theories, the pervasive theory pertinent to this study was devised by Knowles (1984) who did a masterful job of reviewing existing learning theories and from them developed an integrated model of adult learning which he named andragogy. It was an attempt to develop a theory specifically for adult learning, now generally accepted, and is based on several assumptions highly pertinent to adult education in the conference setting. These assumptions are that adults need to know why they need to learn something and they approach learning as problem solving. They bring a wealth of experience to any learning situation and learn best when topic is of immediate need in order to cope with real life experiences. Learning needs to have practical usage for real life problems or application.
Adult learner participants. It is hard to describe the adult learner as there is very, very little data on the adult learner participant in non-credit continuing education (Milam, 2005; O'Donnell, 2005; Paulson & Boeke, 2006). The American Council on Education has one of the most recent reports on adult participation in education and this is based on 2002-2003 data, which is now quite old. They define adult students as 25 years of age and older and find that they represent 40% of the student population, including both for- and not-for-credit enrollments. The study classifies 12 types of adult learning and one of these is attending conferences or conventions. Nineteen percent received work-related instruction from a professional or labor association/organization (O'Donnell, 2005). Data also show that work-related education is prevalent across age groups as seen in Figure 1: Adults Attending Education for Work-related Reasons.

Figure 1: Adults Attending Education for Work-related Reasons (O'Donnell, 2005, p. 5)

Another source of data may provide some insight although this data does not target conference participants. Eduventures is a higher education research and consulting firm that serves its members with data both within and across 300 or more institutions. One specialty research area is the Continuing and Professional Education
Learning Collaborative. They find that the adult learner presents a huge potential market of new students. They report that “the typical adult learner is 38.8 years of age, has an annual household income of approximately $76,800, and is employed full time. A majority is married and one-third has dependent children younger than 18 living at home” (Eduventures, 2008, p. 3). Further, while this demographic mirrors the population in the United States, it does represent a higher income sector. The most important reason noted for enrolling in CPE is related to continued development in the person’s field of work (Eduventures, 2008).

**Adult education providers.** There are a variety of ways to categorize or describe providers of continuing education for adults and adult education writers have developed their own lists and descriptions (Apps, 1989; Caffarella, 2002; Cervero, 1988; Hiemstra, 1976; Houle, 1980; Long, 1983; Merriam & Brockett, 1997; Nowlen, 1988). The idea that professional associations are a major type is supported in the literature, and two frameworks are described below.

The Apps Model is portrayed in Figure 2: Apps Provider Framework (1989, p. 279). This framework has the adult learner at the center, but differentiates between tax-supported organizations such as school systems and the for- and non-profit sectors allowing for a fourth category of “other.” This supports the concept of this study to focus on the non-profit sector where many associations fall, as a leading provider. To further support this, again refer to Table 1: Census Data – Association Type Establishments, which portrays the large number of business and professional associations identified in the United States in 2002-2003, which by their coding are in the not-for-profit sector. The American Society of Association Executives (ASAE) states that ninety-five
percent of survey respondents reported that they were in a 501(c) or a not-for-profit category (American Society of Association Executives, 2006).

Houle (1980) identified seven types of providers. These are (1) autonomous groups which can be further divided into the categories of institution-based, geographically based, subject-based, personal aspects of practitioners, and elitist organizations, (2) associations [emphasis added], (3) professional schools, (4) universities, (5) employment settings, (6) independent providers, and (7) purveyors of professional supplies and equipment. Since this study focuses on CPE in associations, we will consider Houle’s description of this type in the upcoming section on associations.

**Program Planning Models**

Prescriptive, sequential, operational program planning models for adult education abound (Boone, 1985; Caffarella, 2002; Cervero, 1988; Houle, 1980; Nadler & Nadler, 1977; Nowlen, 1988; Sork & Caffarella, 1989; Tyler, 1970). This section will examine the literature in this area providing an abbreviated description of major models, most of which themselves are combinations of ideas from the literature that preceded them. Most were published in the 1980’s.
These models, while similar in many respects, take varying approaches. Most are quite practical and prescriptive and could be described as primarily tactical. There has been little recent literature in this arena, with perhaps the exception of literature specific to the health sciences, and especially continuing medical and nursing education. These materials are not included in this review because they are highly prescriptive, and use definitions peculiar to their accreditation requirements. Further, they appear to follow a different theoretical model of adult education than the subjects in this proposed research. The health science, medicine, and nursing approach tends toward the behavioral model, often implemented with a competency framework (Nowlen, 1988), attempting to deliver education that can measurably change practice to the benefit of health outcomes of patients.

The major models are summarized individually and are presented in chronological order of their development since each tends to build upon the previous. The descriptive summaries below appear as tables because this will aid in the ability to conceptualize them in this literature review and subsequently in relating research findings back to the models.

**Tyler model.** Tyler’s little red book, *Basic Principles of Curriculum and Instruction* (1970) made a huge impact on educational practice. Literally on page one, Tyler’s rationale states four fundamental questions to guide educational program planning. This widely accepted model is inherent in today’s program planning and if program planning gets off course or confused, these questions can be asked to help a group gain direction or redirect. Please see Table 2: Tyler Model.
Table 2: Tyler Model

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What educational purposes should the school seek to attain?</td>
<td>“What educational purposes should the school seek to attain?” (Tyler, 1970, p. 1)</td>
</tr>
<tr>
<td>What educational experiences can be provided that are likely to attain</td>
<td>“What educational experiences can be provided that are likely to attain these</td>
</tr>
<tr>
<td>these purposes?</td>
<td>purposes?” (Tyler, 1970, p. 1)</td>
</tr>
<tr>
<td>How can educational experiences be effectively organized?</td>
<td>“How can educational experiences be effectively organized?”</td>
</tr>
<tr>
<td>How can we determine whether these purposes are being attained?</td>
<td>“How can we determine whether these purposes are being attained?”</td>
</tr>
</tbody>
</table>

(Tyler, 1970, p. 1)

**Houle model.** Houle described a model which incorporates three modes of participation: instruction, inquiry and reinforcement. A list of criteria describing the goals are listed below. As with Tyler’s model, this model can be used to guide a group’s overall efforts and it also provides a feedback loop. A numbered list is provided because these are essentially sequential. This is a simplification of the steps in this model.

Table 3: Houle Model

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>A list of criteria are developed to describe the project; these are</td>
</tr>
<tr>
<td></td>
<td>comprehensive, lend themselves to measurement, and are in conformity</td>
</tr>
<tr>
<td></td>
<td>with enlightened practices” (Houle, 1980, p. 231).</td>
</tr>
<tr>
<td>2.</td>
<td>A proper group is convened to work toward achieving the goal and set the</td>
</tr>
<tr>
<td></td>
<td>standard for determining when it has been reached.</td>
</tr>
<tr>
<td>3.</td>
<td>The same group sets minimum acceptable standards.</td>
</tr>
<tr>
<td>4.</td>
<td>All involved work toward the goal.</td>
</tr>
<tr>
<td>5.</td>
<td>The program is put into place and data are collected.</td>
</tr>
<tr>
<td>6.</td>
<td>Achievement of the goal is analyzed, any deficits are noted.</td>
</tr>
<tr>
<td>7.</td>
<td>A program put in place to correct identified deficits.</td>
</tr>
<tr>
<td>8.</td>
<td>The new program is made operational.</td>
</tr>
<tr>
<td>9.</td>
<td>Performance data comparing before and after are compiled.</td>
</tr>
<tr>
<td>10.</td>
<td>Any further action is determined, and the program circles back to the first</td>
</tr>
<tr>
<td></td>
<td>step.</td>
</tr>
</tbody>
</table>

(Houle, 1980, pp. 230-234)
Knowles model. In *The Modern Practice of Adult Education: From Pedagogy to Andragogy*, Knowles (1980) uses the whole book to present his model, thus it is a very comprehensive model. Without getting too deep into the details, the model can be fairly simply portrayed by excerpting from the book’s table of contents. Please see Table 4: Knowles Model. This model rather neatly divides into two perspectives. Numbers one through four could be described as more strategic in nature and number five as more operational or tactical. Evaluation, listed as number six has elements of both tactical and strategic.

Table 4: Knowles Model

<table>
<thead>
<tr>
<th>Element</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish an organizational climate and structure</td>
<td>Organizational purpose, setting, policy base, committee structure, staff</td>
</tr>
<tr>
<td>Assessing needs and interests</td>
<td>Critical step</td>
</tr>
<tr>
<td>Defining purpose and objectives</td>
<td>Translating needs into objectives</td>
</tr>
<tr>
<td>Designing a comprehensive program</td>
<td>Formats for learning as an individual or a group, community development</td>
</tr>
<tr>
<td>Operating a comprehensive program</td>
<td>Administration&lt;br&gt;Recruiting and training teachers / leaders&lt;br&gt;Managing facilities&lt;br&gt;Helping people select programs&lt;br&gt;Public relations&lt;br&gt;Promotion&lt;br&gt;Reporting&lt;br&gt;Budgeting and financing</td>
</tr>
<tr>
<td>Evaluating</td>
<td>Purposes of, conflicting interests, the process, methods, analysis, and outcomes</td>
</tr>
</tbody>
</table>

(Knowles, 1980, pp. 6-8)

Nadler & Nadler model. Although these authors had written a previous book on conference planning (Nadler & Nadler, 1977), it was their later book, *The Comprehensive Guide to Successful Conferences and Meetings* (Nadler & Nadler, 1987) that was referenced by Caffarella (2002) in her program planning framework. As with Knowles (1980) described above, the table of contents best portrays the key elements. See Table 5: Nadler & Nadler Model. This model is arguably the most tactical in its
approach although there is a chapter that addresses issues concerning who is involved in the project.

Table 5: Nadler & Nadler Model

<table>
<thead>
<tr>
<th>Site selection</th>
<th>Meeting and function rooms</th>
<th>Presenters and speakers</th>
<th>Audiovisuals</th>
<th>Food and beverage</th>
<th>Exhibits</th>
<th>Guests and companion programs</th>
<th>Marketing</th>
<th>Public relations</th>
<th>Transportation</th>
<th>Entertainment</th>
<th>Budgeting</th>
<th>Registration</th>
<th>Participant program book</th>
<th>Evaluation and follow-up</th>
<th>Conducting the conference onsite</th>
</tr>
</thead>
</table>

(Nadler & Nadler, 1987)

Cervero and Sork & Buskey model. Cervero addressed the issue of program planning from a developmental perspective emphasizing the need to continually reflect on the process (Cervero, 1988). We cannot really attribute a specific model to him, as such, but instead he analyzed 22 models from a variety of authors dating from 1970 through 1981 using a structure previously suggested by Sork and Buskey who had reviewed the program planning literature from 1950 to 1983 (Sork & Buskey, 1986). The analysis included level of program emphasized (activity, organizational, community), client system orientation (membership or non-membership), sophistication necessary to benefit or use effectively (low, medium, high), and degree to which model is an explicit theoretical framework (not present or not addressed, low, medium, high). The last
section of this analysis addresses the comprehensiveness of each step in the planning process (again, rating by not present/not addressed, low, medium or high). The model that emerges from both Sork and Buskey and Cervero, using the same structure that other models are portrayed in this literature review, would be as follows.

Table 6: Cervero and Sork & Buskey Model

<table>
<thead>
<tr>
<th>Analyze context and client system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess needs</td>
</tr>
<tr>
<td>Develop objectives</td>
</tr>
<tr>
<td>Select/order content</td>
</tr>
<tr>
<td>Select/order processes</td>
</tr>
<tr>
<td>Select instructional resources</td>
</tr>
<tr>
<td>Develop budget and administrative plan</td>
</tr>
<tr>
<td>Assure participation</td>
</tr>
<tr>
<td>Design evaluation procedure</td>
</tr>
</tbody>
</table>

(Cervero, 1989, pp. 118-119; Sork & Buskey, 1986, pp. 92-93)

Context is a key perspective to the reasoning behind the research in this study. Cervero explains this well, “All continuing educators operate out of their own planning framework, which is influenced by their personal values and beliefs and the institutional context in which they work. The central task for effective practice is to make one’s own framework explicit, analyze its assumptions and principles, and alter it when necessary” (Cervero, 1988, p. 113). In subsequent writing on this subject (Cervero & Wilson, 1994, 1996; Cervero & Wilson, 2006) the notion of context was further explored and included the concepts of power, interests, and negotiation. This work has added greatly to the conceptual understanding of the first item in Table 6: Cervero and Sork & Buskey Model. Caffarella included these elements in her framework as the topics discerning the context and building a base of support. See Figure 5: Caffarella’s Interactive Model of Program
Planning (Caffarella, 2002, p. 22). Additionally, the works of Malcolm Gladwell (2002, 2005, 2008), though not intended for an audience of adult educators, also suggest insightful ways that power, interests, and negotiation play out, who or what can be influential, and to some extent, the seemingly quirky way humans tend to make decisions.

Related to Cervero’s model is the idea of reflective practice. CPE provided through the medium of conferences could be characterized as a situation requiring operational expertise applied in a strategic environment while serving myriad constituencies. CPE professionals often practice thinking on their feet to solve immediate challenges that are both non-linear and are impacted by a variety of inputs potentially impacting more than one constituency. This phenomenon, practiced by both trained and untrained adult educators, may be what Schön (1983) calls thinking in action. Beyond application of specific training, this is “know-how” (Schön, 1983, p. 50) or “knowing more than [a person] can say” (p. 51). It can be applied in both operational and strategic situations and may be a factor that surfaces in this research study.

**Nowlen model.** Nowlen (1988) described three curriculum development models for CPE. The first is the update model in which someone who knows something teaches it to others to bring them up to date. The second is the competence model which is a measure of both capability and actual functioning. This model is being employed today as a means of setting practice standards and is often related to competency-based education. The performance model is more encompassing in that it takes into account not just individual performance, but performance within context. Once these basic philosophical approach models were described, Nowlen (1988) then defined some program-development implications which are operationally defined and portrayed in Table 7: Nowlen Model. This is a bit more concrete and prescriptive than the models previously described. Interestingly, Caffarella (2002) does not cite Nowlen. Perhaps this
is because the focus of his book is directed at a particular type of adult learner program, although the elements of the program design certainly fit within her framework.

**Table 7: Nowlen Model**

<table>
<thead>
<tr>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define an educational activity</td>
</tr>
<tr>
<td>Deciding to proceed</td>
</tr>
<tr>
<td>Write objectives</td>
</tr>
<tr>
<td>Decide on format</td>
</tr>
<tr>
<td>Larger patterns of life which include budgeting, site selection, and defining the audience</td>
</tr>
<tr>
<td>Implementation</td>
</tr>
<tr>
<td>Evaluation</td>
</tr>
<tr>
<td>Learning from the experience and perhaps deciding to do another</td>
</tr>
</tbody>
</table>

(Nowlen, 1988, pp. 119-149)

**Sork model.** In the *Handbook of Adult and Continuing Education* (Wilson, Hayes, & American Association for Adult and Continuing Education, 2000), Sork “trace[d] the evolution of planning theory, to highlight some of the more notable critiques, to argue that new approaches to understanding and engaging in planning are needed, and to propose one such approach” (2000, p. 171). He further explored some newer perspectives including feminism, postmodernism, and critical theory as a means of suggesting that program planning should be centered in “the technical, the sociopolitical, and the ethical” (Sork, 2000, p. 196). From these he constructed the two, related frameworks portrayed in Figure 3: Sork -- Basic Elements (2000, p. 180) and Figure 4: Sork -- Three Domains (2000, p. 185). Please note that the first figure is envisioned to lie atop the second figure to imply an interrelationship of the two.

Continuing with Sork, as in other program planning models or frameworks, words are used to either lay out lists of planning elements, or they are grouped into categories as this portrays. The top center element, *analyze context and learner community*, is
described in detail to include: recognition of a dynamic context, factors that may limit options and possible action, and even age, race, gender and other descriptive, but influential elements. **Justify and focus planning** refers to needs assessment, and other decision-making around the program focus. **Clarify intentions** includes creating objectives. **Preparing instructional plan** includes decisions about delivery, technology, transfer of learning, motivation and the like. **Prepare the administrative plan** refers to the practical administrative processes and he warns that this element is no less important than the other elements. **Develop summative evaluation plan** involves measuring the worth of the project. Central to all of these elements is the idea of **formative evaluation** which is the research of one or many types that helps determine that there is need for the program in the first place, and that it is a program of use and/or appeal for the intended audience.

Sork uses these general categories as a stepping-off-place to lead to a set of three underlying dimensions: technical, social-political, and ethical. The **technical domain** includes deeper questions than ‘what facility should we hire’ and instead probes at such questions as best ways to describe the program to decision-makers and potential attendees, what is the right price position, and what is the best type of program for this community. It goes beyond tactical expertise to the skill level in outlining the right questions to ask. The **social political domain** has to do with the human dynamics of interests and power relationships. This addresses the ‘people work of program planning which Cervero and Wilson have explored (Cervero & Wilson, 1996; Cervero & Wilson, 2006; Wilson & Cervero, 1996a, 1996b). The **ethical domain** is concerned with whether the program and its contents are the right thing to do, are done the right way, and similar considerations.
Caffarella's interactive model of program planning. The most comprehensive, and perhaps practical model is that by Caffarella (2002) which extracts the ideas of Cervero & Wilson, Houle, Knowles, Nadler & Nadler, and Sork, among others, into an Interactive Model of Program Planning (Cervero, 1988; Cervero & Wilson, 1994, 1996; Houle, 1972; Knowles, 1980; Nadler & Nadler, 1987; Sork, 1996; Sork & Caffarella, 1989; Wilson & Cervero, 1996a, 1996b). It is described as a "guide, not a blueprint for
practice” and a “map of the terrain…but the map often changes in contour, content and size” (Caffarella, 2002, p. 21). Having no particular beginning or end, this model can adapt to the variations of needs based on the planning group and the intended audience, as well as operational aspects. It is culturally adaptable and described as an easy-to-understand and useful tool. The twelve elements and are quite self-explanatory to the experienced adult education professional. For a detailed explanation table of each element, see Caffarella, 2002, pages 23-24.

![Caffarella's Interactive Model of Program Planning](image)

Figure 1: Caffarella's Interactive Model of Program Planning (2002, p. 21)

There are some basic assumptions underlying this model. First, reflective practice concepts as described by Schön (1983) are built in. Summarized, these assumptions include: focus is on learning for change of one sort or another; the process is non-sequential; context is important – planning happens within an environment of “social, economic, culture and politics;” preplanning is important, but there will be last minute changes; diversity and culture(s) matter; there is no one method of planning that
will guarantee success; and program planning is an iterative process for the program planner who learns along the way (Caffarella, 2002, pp. 26-28).

There is one anomaly that deserves mention when discussing program planning tactical models. Association and meeting planning professional associations such as the American Society of Association Executives, the Professional Convention Management Association, and Meeting Professionals International have all contributed to the literature on the operational aspects, and to a very limited extent include adult education principles of conference planning (Connell, Chatfield-Taylor, & Collins, 2002; McLaurin & Wykes, 2003). Collectively these societies recognize and support the Certified Meeting Professional (CMP), a relatively new but now highly recognized industry certification. This is one area where professional adult educators and professional meeting planners could work toward collaboration and it is surprising that the two groups do not seem to effectively cross-connect.

One of the questions that arises when reviewing what are, really, many similar and related models or frameworks for adult education program planning is, which one is better, which one works better in which situations, and what studies have been conducted to learn what adult education practitioners actually do? Do certain elements common to many of these theoretical guidances have more applicability in one type of adult education and different ones have more applicability in others? With adult education a vast enterprise, the only studies this author could find were very, very limited and only a few were published.

In personal communication with some of these authors, the phenomenal lack of research to test applicability seemed to be substantiated. Dr. Sork wrote, “I worked with one student, Jennifer White, who’s 2002 dissertation focused on the planning of a suicide prevention conference in Canada…. The "classic" example, in my view, of studying what CPE program planners actually do was published by Pennington and
Green in 1976…. Of course, Cervero and Wilson and their students have studied program planning/program planners extensively...some of whom work in CPE so be sure to look at their work as well. I am not familiar with any other studies on planning CPE programs from the planner's perspective (personal communication, May 10, 2010). The referenced dissertation focused on the challenges of persons with disabilities helping plan programs that focused on those disabilities and the conflicts that arose. It was too specifically focused on that interaction to be relevant to this proposed study.

Figure6: Pennington & Green Model (1976, p. 17)

**Pennington and Green Model.** Pennington and Green used grounded theory to study “planning strategies used by persons developing continuing professional education (CPE) program for six professional fields” (1976, p. 13). If this is the classic study and subsequent research has not been conducted, then this article alone reflects the paucity of research into application. “Results indicate planners attend to at least six clusters of activities in their program development processes in a fairly consistent sequence. Results also indicate that there is limited use of knowledge resources available in the literature” (Pennington & Green, 1976, p. 13). The six elements of their general planning model included (1) originating the idea, (2) developing the idea, (3) making a
commitment, (4) developing the program, (5) teaching the course, and (6) evaluating the impact. See Figure 6: Pennington & Green Model. It is easy to see how these basic elements have been incorporated into the other models and frameworks previously discussed in this literature review.

**ADDIE.** There is one other model that deserves mention as it may surface in discussion. It stands for Analysis, Design, Development, Implementation, and Evaluation and is commonly known by its acronym, ADDIE. It is a model most often associated with the American Society for Training and Development (ASTD), the world’s largest professional organization dedicated to the training and development field (ASTD, 2010). No origin of the acronym was found in the literature (Molenda, 2003).

**Personal Communication with Current Theorists and Researchers**

It seemed quite unlikely that the review of literature did not reveal studies on the actual practice of adult and continuing education conference planning. To this end, the researcher contacted four key experts in the field of adult education and programming, and asked them for assistance identifying any additional resources that may have been missed.

Dr. Thomas Sork replied to an email inquiry and provided a link to a specific dissertation, and provided a direct link to the Pennington and Green study (1976), which was highly pertinent and had not appeared in the literature search thus far. He also referenced works by Cervero and Wilson as well (personal communication May 10, 2010).

Dr. Ronald Cervero also replied to an email, encouraging this research and highlighted his interest culminating in his books published in 1994 and 2006. In addition, he suggested two additional dissertations which had not been found in previous searches (personal communication June 1, 2010).
Dr. Rosemary Caffarella replied, “I have had a chance to skim read through it [chapters 1-3] and found you are asking some very interesting questions in an area you note that has not been studied” (personal communication dated September 28, 2010).

In summary, there are a number of rather prescriptive, operational, tactical, or combination models available for adult education program development and any one of these, or any combination, could be employed in CPE conference planning. Throughout the various models is embedded the business of CPE.

**Prescriptive approaches vs. power and interests**

The following discussion addresses Cervero and Wilson’s interest in the factors of power and interests in the planning process. There is agreement that these factors are an inherent part of the process and this section discusses some of the available research in the arena of power and influence, as well as negotiations, the political context, and other similar factors inherent in program planning.

The 1996 issue of *New Directions for Adult and Continuing Education* was dedicated to case studies utilizing Cervero and Wilson’s theoretical framework from their book, *Planning Responsibly for Adult Education: A Guide to Negotiating Power and Interests* (Cervero & Wilson, 1994). Included were six case studies: a community-based planning effort initiated by the federal government, a health-promotion coalition working on programs in AIDS and violence, a college nursing program, medical schools multiple needs challenges, distance education challenges, and ethical issues in planning a community-based program for women (Cervero & Wilson, 1994). A qualitative, multi-case study of extension agents further investigated planning practices in extension finding that there were three structural factors of influence: organizational structure and culture, resources, and power relationships (Mills, Cervero, Langone, & Wilson, 1995). The political practice of adult education was again the subject of a case study by Cervero and Wilson, but the major question was, “What do adult educators really do
when planning educational programs?” (Cervero & Wilson, 1998, p. 5). Yet in this study, it was not an investigation into overall planning practice, but specifically focused instead on the interesting question of negotiations. The driver was that, “Theories about how to develop adult education programs have been dominated by an insistent form of instrumental rationality that emphasize a recurring set of prescriptions (such as assess needs, define objectives) as a solution to all planning problems” (Cervero & Wilson, 1998, p. 5). This quantitative study considered power and influence styles, and power and influence styles in the context of political contexts, thus sectioning a piece of this large puzzle for examination (Yang & Cervero, 2001). The findings tended to confirm previous research that four types of styles can be identified including bystander, tactician, ingratiatory, and shotgun (Yang & Cervero, 2001).

Scott McLean summarized the ideas behind the need for his study quite concisely. The article is essentially a case study of his own experience as he assumed responsibility for a new program. It was grounded in his own experience, as it actually happened, not as it should have happened. The key points are:

- “Research on adult education programme planning tends to focus on either technical or political issues” (McLean, 2000, p. 493).
- “These two traditions have generated ample normative prescriptions about how programme planning should be undertaken, but relatively few empirical studies of how program planning is actually done by adult educators” (McLean, 2000, p. 493).
- “The tension between technical-rational and political models of programme planning has generated some healthy debate in adult education literature” (McLean, 2000, p. 494).
While political sensitivity should clearly be part of adult education practice, technical competency should not be seen as an evil” (McLean, 2000, p. 505).

“To paraphrase a common distinction between management and leadership, technical-rational issues are important because they help adult educators do things right, while political issues are important because they help adult educators do the right thing” (McLean, 2000, p. 505).

The discussion in this case study rather makes the case for the research in this project, taking into account the many facets of adult education program planning in CPE, and asking practitioners about their practice and experience as a grounded theory study.

The Business of CPE

The critical functions of budgeting, venue and service contracting, logistics, negotiating, avoiding attrition, marketing and myriad other critical business-related functions comprise the tactical and operational aspects of CPE. Most of the literature in the operational area comes from the meeting and event planning side of the industry where professional meeting planning associations have themselves been the generators of the knowledge. This review will not investigate the literature of this facet of CPE because it is the strategic processes that are of primary interest.

It is important to note, however, that industry association resources for the tactical and operations functions are strong and actually include some reference to good adult education program planning. The most prevalent professional certification in the industry, the Certified Meeting Professional or CMP, includes in its requirements, some familiarity with adult education principles and program planning basics that draw from the adult education literature (Carey, 1993; Connell, et al., 2002; McLaurin & Wykes, 2003; Nadler & Nadler, 1977).

It is important to understand that this area of employment is often referred to as the hospitality sector. The hospitality sector has two important sides or perspectives:
hotels, transportation companies are what is termed supply side, and event and meeting planners represent, well, what is referred to in the industry as planner side, really meaning buyer. For both “sides,” it seems apparent that doing, has preceded studying, which may not be uncommon in the development of new courses of for-credit study. Recently the first baccalaureate degrees in meeting and event planning have been created and a few graduate programs are now available. While meeting planning is new to academic study, note that hotel/motel/hospitality degrees have been available for a much longer period of time. Thus, it can be said that the supply side has developed academic study earlier and has more programs. Academic study in meeting and event planning, and its tie to adult and continuing education study can probably be reasonably described as in academic infancy.

**Associations**

For this study, an association is considered an organization of individual members which has as its purpose to serve the members’ needs in any number of ways. Service to members may include professional development programs designed to help the member keep up with new developments, current issues, or changing practice. These efforts could be provided through conferences, workshops, publications as well as a chance to grow into leadership roles among peers, network with those peers, and learn from one another (Brockett, 1989; Houle, 1980). Another goal may be to help the field represented by the association to grow (Brockett, 1989). As explained earlier, there are many associations in the United States that are likely involved in educational service to members.

**Associations provide adult education.** This research is most interested in how associations actually plan their conferences. In order to do that, understanding characteristics of associations is needed and Houle (1980) provided an excellent and
thoughtful summary which follows. Associations are generally large enough to have a representative form of governance where professionals meet as equals. Often the goal is to move the profession forward through education of its members or though development of new knowledge. It is likely that any member could rise to leadership, but leadership is often transitional; past leaders may remain active to fill other roles or provide support and history. Guidance provided to educational programs may vary with who is in leadership at the time. Associations may consider education a pervasive task, yet education products may simultaneously exist in virtual silos due to operational structures, e.g. conferences vs. journals, and the staffing necessary to get these jobs done may also be siloed. The interaction among members for decision-making is bettered by informed knowledge and data, as well as ideas from outside the organization. Of the three modes of learning: inquiry, instruction, and performance, associations are more likely to engage in inquiry (Houle, 1980).

Associations are likely to have complex structures and vary widely in size, scope, admittance to membership, and purpose. Membership intent would include connecting like-minded or like-purposed people. There would be a goal and a purpose for the individual as well as the membership as a whole. “An association meets these needs in many ways, including …sponsorship of conventions, conferences, workshops, and other gatherings….” (Houle, 1980, p. 172) and, “in the charters and other basic documents of associations, ‘education’ is often referred to in grand terms as being so pervasive a function that it permeates the entire range of purposes….” (Houle, 1980, p. 172). Thus, education in associations tends to be a central function. However, education may be “specialized …and require separate systems of control…. The resulting divided authority often leads to ambiguity and imprecision” (Houle, 1980). It is important to this study that education in associations is understood to be a function of staff and volunteers, often in complex relationships and systems. “The organizational placement of these
[educational] activities among the policy-making bodies of the association and within its administration usually reflects the conceptions of the function held by those in positions of power – conceptions that are often uncertain and variable” (Houle, 1980, p. 172). This study will only focus on the staff role.

Other roles of education in the association outside of member-specific programs may include education as a means to shape policy as well as practice, to change existing beliefs, to obtain pertinent data from other sectors, and to communicate about the profession to society at large. Thus, education within the society can not only be an agent of change within the membership, but for the larger world (Houle, 1980). Just consider the vast resource of knowledge amassed in an elective membership (each joined because they wanted to) of a typical association of 10,000 members, all of whom are experts in some area of a designated field. Consider the potential impact on practice; associations can wield power and influence.

**Competition.** The potential impact of competition for attendees at CPE conferences should not be ignored as it may be or become a motivating factor in CPE decision-making. Competition may come from other associations as well as other entities such as universities, employers, independent providers, and suppliers, among others (Houle, 1980). Competition could become a brutal driver for change if associations who depend on education for financial support find that competition is cutting into their target audience and ultimately impacting their income stream. New competition seems to be driven by technological advances in the virtual delivery of content. There is current debate in the meetings trade magazines of the efficacy of losing the face-to-face interaction that is a common and important facet of traditional CPE conferences.
Collaboration. No discussion of adult education efforts, especially those of conferences would be complete without some attention to the idea of collaboration. There are many ways in which collaboration plays out in conference planning in associations that is not evident in the corporate world (ASAE & The Center for Association Leadership, 2006). For instance, even at the program development level, chances are that the program committee is comprised of individual association members each of whom work for a collective variety of companies; this perhaps constitutes collaboration among competitors. On the professional level, staff release time to participate in program development implies a collaborative relationship between companies and the association. There is likely a financial collaboration between the association and a wide range of companies through sponsorships and exhibits.

In addition to the volunteer and sponsorship aspect of collaboration is the possibility of partnerships between or among associations specifically for educational projects in the form of conferences. While this is not the focus of this particular research, it is possible that it may arise in this research. Aspects of collaboration include that it is a partnership of varying levels of formality, leadership is dynamic, there are likely political considerations and tensions, developmental stages are recognizable, and the political nature of the role played by continuing professional educators could be quite intense (Cervero & Wilson, 2006; Donaldson & Kozoll, 1999).

Association research. The research project that lead to 7 Measures of Success: What Remarkable Associations Do That Others Don’t (ASAE & The Center for Association Leadership, 2006, pp. 95-102) detailed the process of an intense research project to help understand what makes a successful association. The research proposed in this study cannot compare with a multi-sponsor, multi-year research endeavor, but this project acknowledges the ASAE study which included: vision, value and mission statements; member demographics (limited) and member benefits; organizational chart
and select job descriptions; list of educational products; annual conference program
design, development, schedule [sometimes these are in the form of Standard Operating
Procedures or SOPs]; and the process for identifying new educational products (ASAE &
The Center for Association Leadership, 2006, pp. 95-102). In addition, the report lists the
interview questions, some of which may be pertinent to this study (ASAE & The Center
for Association Leadership, 2006, pp. 103-109). Select parts of this study are briefly
discussed as follows.

Associations utilize mission statements to guide the decision-making of the organization. In the ASAE study, the following questions were asked about vision, mission and purpose of the organization: “How would you characterize the basic reason for this organization’s existence? Has it changed over time? [and] “Describe a difficult choice or important decision you have had to make. Did the vision, values, mission, or goals come into play in your decision or choice” (ASAE & The Center for Association Leadership, 2006, p. 103).

Organization charts graphically show responsibility and relationships. These are important to understanding both staff and volunteer responsibilities. Job descriptions explain staff roles; the governance structure explains committee roles in the same fashion. Standard operating procedures or SOPs outline the steps for operational tasks and sometimes the steps in strategic decision-making.

All of these processes relate to and support the processes and procedures of association-provided education. In 2005, the American Society of Association Executives conducted a periodic survey of its 7,403 member organizations. One facet of the survey focused specifically on education functions and one chapter is devoted to education results. (American Society of Association Executives, 2006b). The education function of associations is very important. Associations offer a tremendous amount of CPE to a very, very large number of learners, in a variety of settings and for a variety of
purposes. It is also big financial business. One is led to wonder if some or many associations may operate as islands with limited knowledge of what adult and continuing education information is available to support the association’s work.

**The Professions and Association CPE**

For this study the term *profession* will be loosely interpreted. Profession as defined by the Merriam-Webster online dictionary is defined as “a: a calling requiring specialized knowledge and often long and intensive academic preparation, b: a principal calling, vocation, or employment, and c: the whole body of persons engaged in a calling” (2009). This definition does not limit the interpretation of the word to only certain callings, vocations or areas of employment, but instead is more all-encompassing. The breadth of the definition is important to the way this study looks at professions, that is, with the widest interpretation because there is “no commonly agreed upon answer to the question of what a profession is” (Cervero, 1989, p. 517). In the context of associations, the term professional is loosely interpreted to be any association or worker who considers itself or him/herself to be one. This is important because the focus of this study is Continuing Professional Education.

Further, outside of the definition of a profession, is the adult learners’ attitude about themselves as a professional which implies a perspective that is important to an individual’s approach to continued learning in their field. “Professional will not be considered as a label, title, or rank, but rather an attitude about how one does one’s chosen vocation” (Flagello, 1998, p. 45). These things include empowerment, change, service to others and to the field, collaboration, risk, employing CPE as a catalyst for change, a means of meaning-making in the larger views of life outside of work, and other elements are all part of this professional attitude (Flagello, 1998).

The literature refers to three different conceptions relating to professions (Cervero, 1989). The *functionalist viewpoint* focuses on the expertise of the profession
and how that expertise solves very important societal problems. The role of CPE in this view is to keep the practitioners in this field updated and knowledgeable on any parts of practice in which the professional may not be as well versed. The conflict viewpoint is a play on power where each profession is in a type of race to assert its power and influence and thus cement its ability to diagnose and deliver. In this case education’s role is to mitigate the differences between the professionals and the people they serve to create a more equal relationship. The critical viewpoint is a more recent position whereby the challenge to education is to “help professionals understand the ethical and political, as well as the technical, dimensions of their work” (Cervero, 1989, p. 519). Understanding how the association views their role: functionalist, conflict, or critical, may help understand their decision-making processes.

Another clue to understanding an association may come from an understanding of how professional they are in their development. In the seminal book, Continued Learning in the Professions, Houle (1980) sought to describe what constituted a full profession by outlining 14 characteristics to be interpreted as a continuum along which groups could be described as more or less professional. He suggested that as groups became more and more professional there was a need to ensure that professional practice maintained a high standard, providing the drive to provide continuing education for members.

In studying 17 professions, Houle (1980) came to the following conclusions about what constitutes a profession. He refers to it as the professionalizing process [italics for emphasis] and can be described as a continuum from the earliest stages of an association’s founding through its growth into what is generally accepted as a full profession such as law or medicine. In no particular order, the continuum is represented by 14 descriptors. It is easy to intuit the adult education opportunities embedded in the professionalizing process. This notion of the professionalizing process may be important
to this study as it is within the “growing” part of practice that challenges may arise in an association’s selection and delivery of education to its members. Houle’s (1980) characteristics of professionalization include: (1) clarifying and defining the function of the profession, (2) mastery of theoretical knowledge, (3) the capacity to solve problems, (4) use of practical knowledge, (5) self-enhancement (of topics not directly related to their occupation, (6) formal training to enter service, (7) credentialing, (8) creating of a subculture with distinctive attributes such as traditions, (9) legal reinforcement or formal rights and privileges of practice, (10) public acceptance, (11) ethical practice, (12) penalties and enforcement, (13) relationship to other vocations, and (14) relationships to users of their services (Houle, 1980, pp. 34-75).

Individuals are also impacted by the professionalizing process along which they strive to meet higher and higher standards held important to a particular body of knowledge (Houle, 1980). “Continuing education’s role is as self-renewing as the professionalizing drive. It enables higher levels of performance, and in the achievement of these new levels of performance, their inadequacy becomes clear and new sets of educational objectives become necessary” (Nowlen, 1988, p. 12).

To summarize, the term continuing professional education “came into general usage in the late 1960s” (Houle, 1980, p. 7) and regardless of the subject matter, “…professions are markedly similar in their approach to continuing education programs. Every occupation has its own knowledge base and code of practice; its own lore, terminology, and point of view; its own mysteries and secret places; and a long-standing desire to repel invaders (Houle, 1980, pp. 14-15).

These characteristics of associations and individuals within the context of professionalization may play a role in understanding the focus group results.
Continuing Professional Education (CPE)

The field of continuing adult education includes a wide variety of non-credit programming. It is a continuum from self-directed learning of all types including reading journals to programs sponsored by colleges and universities (workforce education to professional conferences) to the same offered by associations, libraries, civic associations, among a host of others. There are virtually no studies to describe it statistically in terms of offerings or participation. According to Cervero (1989, p. 514), CPE is “an area of educational practice devoted to continuing education for the professions [which has] sprung into existence within the past two decades.” However, as a field it has simply been ignored (May, 1998). In 1980 Houle suggested that CPE was a “rapidly expanding educational market” (p. 193) and that was 31 years ago. Since then, anecdotal data suggests that it is big business, but there is precious little data to directly quantify this. According to Lifvendahl few practitioners may hold a consensus definition of CPE (Lifvendahl, 1998).

How big is CPE? The size and scope of CPE are conjectures at best since comprehensive records – or any records across the field -- are not kept. There are some clues, however, and this section will investigate some data that provide insight into the prevalence of CPE.

“There is no official count of professional associations” (Nowlen, 1988, p. 185). Even so, Nowlen did cite the Encyclopedia of Associations as listing at least 13,000 national associations of which at least 3,000 seemed to be professional ones (Nowlen, 1988). Currently that Encyclopedia, now available in electronic form, includes “National Organizations of the U.S., which covers more than 22,200 American associations of national scope; International Organizations, which covers some 22,300 multi-national, bi-national, and non-U.S. national associations; and Regional, State, and Local Organizations, which covers more than 115,000 U.S. associations with interstate, state,
intrastate, city, or local scope or membership” (Dialog, 2009). Even if we compare only national associations these number suggest a 72% increase over 21 years. This encyclopedia lists 18 types of associations, and at a glance it is reasonable to assume educational activities would be likely in many. The list includes: Environmental and Agricultural; Legal, Governmental, Public Administration, and Military; Engineering, Technological, and Natural and Social Sciences; Educational; Cultural; Social Welfare; Health and Medical; Public Affairs; Fraternal, Nationality, and Ethnic; Religious; Veterans’, Hereditary and Patriotic; Hobby and Avocational; Athletic and Sports; Labor Unions, Associations, and Federations; Chambers of Commerce and Trade and Tourism; Greek and Non-Greek Letter Societies, Associations, and Federations; and Fan Clubs (Dialog, 2009). It is thus likely that association education is an enormous endeavor, impacting many professionals or workers across many industries and interests.

CPE is also offered by higher education institutions which typically do collect program data. However, data on non-credit programming whether course- or conference-based, is generally not recorded within a single institution, much less across institutions. Reporting on United States data, Milam (2005) conducted “a first-of-its-kind national study and portrait of noncredit course activity” (p. 57). This article, offered several pertinent observations:

- “A much more detailed portrait of nontraditional learners who receive training through noncredit activities needs to be drawn” (Milam, 2005, p. 67);
- Change drives nontraditional students (adults) into seeking noncredit education;
- Professions and professionalizing groups, using the definition of professions adopted in the adult education literature and noted in this review of literature, have often created accreditation standards for the field that they represent and thus focus on
education as a means of encouraging currency among its members through a requirement for education hours to maintain that accreditation; and

- The trend for continual updating through education is increasing and is expected to continue (Milam, 2005).

While this article focused on noncredit offerings in higher education and these differ in delivery method somewhat from CPE offered in a conference format, it seems reasonable to suggest that the impetus to attend, and the learning sought, may not be different to the learner.

In the association arena, the American Society of Association Executives and The Center for Association leadership has benchmarking data pertinent to this study in its publication, Policies and Procedures in Association Management: A Benchmarking Guide, Volume 7 – Conventions and Meetings, Education and Professional Development, Certification, Accreditation, and Licensing (2006). While it is actually not possible to find any direct reference to the number of associations that exist, nor to determine how many of them provide education (A. Kessler, ASAE staff person personal communication, June 23, 2009), the results of this study can provide some insight into the size of CPE in the United States. While not descriptive of the education part of CPE, the following data support the idea that CPE is big business, has many attendees, and is the focus of much attention by associations’ professional groups. Half of the respondents reported at least one Full-Time Equivalent (FTE) staff person responsible for meeting planning (p. 9) A median of $350,000 of annual gross revenues was reported from meetings (p. 9) and almost all respondents held an annual meeting (p. 10) ranging in size from 265 to 1,175 attendees (p. 10). The mean annual budget for meeting functions (which may include non-CPE meetings) was $1,089,696 (p. 21). An average of 33% of members attended the Annual Meeting or other type of annual event (p. 28). Over 50%
of respondents had their largest yearly meeting lasting four or more [sleeping room] nights (p. 34).

In addition to the business aspects of association meetings, the same report (American Society of Association Executives, 2006) offers these findings regarding education and professional development. A majority of organizations with more than 11 FTE overall have at least one person serving specifically in the area of professional development (p. 41). There were 1,004 respondents in this part of the survey (p. 45). Seventy percent sponsored meetings for education or professional development including conferences, seminars or workshops and over half report that these meetings offer CEUs (p. 41). A reported median of 110 hours of educational programming was offered in the research year (p. 41) but the mean among the 395 respondents was 4,128 hours, skewed by the size of the association responding (p. 46). In-person programs were by far the majority reported (p. 41). One third of respondent associations offered a certification program and one in five offered CEUs (p. 55).

How does the U. S. Government describe meeting professionals? There are additional related clues as to the size and growth of CPE from two separate governmental sources. Within the last 10 years the Bureau of Labor Statistics Occupational Outlook Handbook (Bureau of Labor Statistics, 2008-09) began listing Meeting and Convention Planners as a specific occupation, tracking its data and projecting the growth of this occupation in the future. The document states that: Meetings and conventions bring people together for a common purpose, and meeting and convention planners work to ensure that this purpose is achieved seamlessly. Meeting planners coordinate every detail of meetings and conventions, from the speakers and meeting location to arranging for printed materials and audio-visual equipment (Bureau of Labor Statistics, 2008-09).
While bachelor’s degrees are mentioned as necessary, most of the learning is on-the-job. The listing of educational areas leading to this occupational specialty lists “marketing, public relations, communications, business, and hotel or hospitality management” (Bureau of Labor Statistics, 2008-09), but does not list adult education, which appears to be a clear omission of a pertinent background for what is, to a large extent, the support of a vast adult education enterprise. However, the industry-based Certified Meeting Professional or CMP designation includes adult learning as part of the required examination topics (Convention Industry Council, 2011).

Meeting and Convention Planning is expected to grow by 20 percent, faster than the national average (Bureau of Labor Statistics, 2008-09). This document classifies the type of meeting planner, according to median income, from higher to lower, in the following order: business, professional, labor, political, and similar organizations; other support services; local government; colleges, universities, and professional schools; and traveler accommodation (Bureau of Labor Statistics, 2008-09). That the Bureau of Labor Statistics includes this occupational area in its statistics is a testament to both the size of the sector and recognition of its business importance.

Additional reference regarding the scope of CPE comes from a document resulting from a collaboration of the Council for Adult and Experiential Learning (CAEL), the National Center for Higher Education Management Systems (NCHEMS), and the Lumina Foundation for Education entitled, Adult Learning in Focus (CAEL, NCHEMS, & Lumina Foundation, 2008a). Again, this document does not focus on CPE, but it does provide state-by-state data on adult education, providing guidance for policy makers in the area of adult workforce education. A companion document, State Policies to Bring Adult Learning into Focus (CAEL, NCHEMS, & Lumina Foundation, 2008b) also focuses on adult workforce education, but notes that “the nation faces significant gaps in available data about adult participation in many areas” (p. 4) and
…furthermore, we know very little about the education and training provided by employers both within and beyond the workplace. Such training comes in many forms and there is no standard way of documenting it. Addressing these and the other data gaps detailed in the report should be a priority in state and national policymaking over the next decade (CAEL, et al., 2008b, p. 4).

In summary, there are virtually no consistent data to describe CPE across the United States. The studies, reports, and policy recommendations cited above describe aspects of CPE or provide credence to the notion that CPE is widely practiced, impacts a very large number of professional or professionalizing groups, and is really big business. Due to its size, it is a topic worth studying albeit a hard one to describe with any specificity. One way to approach this challenge is to separate it into different types.

Types of CPE providers. While it is difficult to concisely conceptualize all the types of CPE, there are some perspectives that may help understand it better. Houle offers a description describing providers or “frameworks” that are based on “the institutions that sponsor them” (1980, p. 165). These include “autonomous groups, professional associations, professional schools, the non-professional-school sectors of universities, places of employment, independent providers of learning opportunities, and purveyors of professional supplies and equipment” (Houle, 1980, p. 166). Of most interest to this study is the association provider.

Caffarella (2002, p. 9) also approaches a classification based on type of offerer (1) independent public/private education organizations, (2) educational institutions, (3) quasi-educational organizations such as museums, libraries (public and private organizations such as associations are in this category), and (4) non-educational organizations including businesses, military, government and unions.
Nowlen (1988) classifies models based on the reason for the offering: (1) the update model, (2) the competence model, and (3) the performance model. He believes that the approach is a continuum of self-renewal, whereby higher levels of performance eventually create a realization that there is more to achieve and this realization of inadequacy creates a new goal for learning.

The impetus for the tremendous growth in adult education can be compared to the increasing rate of change in our society. “In response to, and as a consequence of, momentous changes and developments, all kinds of agencies, institutions, and organization have become involved in providing educational programming for adults” (Long, 1983, pp. vii-viii). This was written in 1983 and the rate of change has increased since then.

The people who plan CPE. Everything is relative and that includes what the people at the planning table know, have experienced, hold as truth within their own personal context even as they try to consider the content of the setting. “In our view, real people plan programs in complex organizations, which have traditions, political relationships, and needs and interests that profoundly influence the planning process” (Wilson & Cervero, 1996b, p. 5). In addition, no matter which program planning theory followed, “the organizational power relationships within which they [the program planners] must act always profoundly structure their planning actions (Wilson & Cervero, 1996b, p. 6). Context matters (Sork & Caffarella, 1989). It is whose interests come to the foreground that have strategic importance (Wilson & Cervero, 1996a). The work of planning is always political with power relationships, interests, negotiation, sense of responsibility, ethics, and democracy important (Wilson & Cervero, 1996b).

So accepting that this is a very large field of study in itself, how can context be related to this proposed study? It is related because it is the planner who may have to decide whose interests matter.
Planners must learn to negotiate power and interests responsibly, because their actions validate whose interests matter. Because power and interests matter, planners must learn how to anticipate sources of support and potential obstacles to plan responsibly. In order to anticipate, planners must determine the power relationships by figuring out who counts and who should count. Planners must know who they are responsible to (that is, whose interests matter, both politically and ethically),” (Wilson & Cervero, 1996a, pp. 98-99).

If this is then the case, that power and interests matter, what role do planners play? What do their job titles suggest? Some common naming of staff roles is documented below for the purpose of stating positions that tend to be common in associations.

The highest association executive is usually the chief executive officer (CEO) or president; this role is highly strategic and this person is the leader of the organization and its public face. The next staff role could be a vice president. Not all associations will have someone in this position, but many will. This is likely to be a position that is primarily strategic, tying together a number of operational programs. Next in hierarchical order might be a Director who, conversely to the Vice President, is centered in operations but strategically aware. The Director will likely have specific deliverables for which she/he is responsible. This position will probably be highly involved in association committee work. The next position might be named Coordinator. A Coordinator will be operationally focused, filling a need for day-to-day tasks. The degree to which this position is included in helping the Director meet delivery goals will likely vary. The Coordinator will likely be highly involved with the needs of individual members.

One wonders if any of these roles may be filled by an adult and continuing education trained professional. According to Cervero, the role of the continuing professional educator is often a process role, “mediating a particular relationship
between content and educational practice” (1988, p. 36). This is particularly true when the continuing professional educator is not also trained in the content area of the profession in which they practice their educator role (Cervero, 1988).

There are differing opinions as to whether staff members serving in a leadership role in continuing professional education should be dually trained in the subject matter of the program. In some organizations, subject matter experts serve as vice presidents, directors, and coordinators. In others, trained and experienced adult educators may fill these roles. In some organizations, subject matter experts seek adult education training for themselves to better fulfill their job functions. Which is more important, content or adult education experts? This adult educator suggests that the best choice is, of course, a dually trained professional in both areas. However, if the choice is only content or adult education trained, perhaps the adult educator is the preferable choice because they are a practitioner whose expertise is applicable across subjects – and the content of the association can be leveraged by member volunteers. The education to be transmitted is transmitted by subject-matter experts and adult educators are well suited to effectively support the overall program.

**CPE Research – Two Related Qualitative Studies**

There are two relatively recent qualitative case studies on professional conference program planning whose results suggest items that may arise in this research. Both of these dissertations are examples of research in action (Schön, 1983).

In 1998, Sara Cameron May successfully completed a qualitative dissertation entitled, *A Case Study of the Role of continuing Professional Education in Three Professional Associations* and noted that associations have “very few resources to help them provide the high quality continuing professional education commonly demanded by the professionals they serve and frequently expressed in the adult education literature”
More than 10 years later, this is still true. Google Scholar, an online research resource that scans the internet for citations, indicates that this work appears to have been cited only once. The field of research into continuing education professional practice is exceedingly limited.

This research focused on the subject association’s staff leaders’ perspective of the role of CPE on the profession, on practice, and the continuing education function within the association. All of the research is focused on the “desired ends of practice” (May, 1998, p. 8) examining key staff and volunteer leaders through interviews. The purpose was practical – to develop guidelines for effective practice. She warned that, “Continuing education function must be studied in context. The influences upon the function – the profession, the association as an organization, the educational leaders with the association, and the practice of the program planners are inseparable” (May, 1998, p. 3). This supports practice research in this field.

A second pertinent qualitative dissertation is entitled, A Study of the Process by Which Professional Associations Plan their Technical Program for their Annual Conference was competed in 2001 (Wills). This study considered models of adult learning, continuing professional education, program development, learning styles, culture and cognition, and organizational dynamics. Two subject associations were examined through staff and volunteer interviews, and document and procedural review. The associations studied were found to hold a functional view of the professions, that their role was to serve their members and the profession, to address common issues and help to improve professional practice. The association’s education role included presenting learning opportunities and serving the business needs of the association. Specific abilities that the education staff needed included, “business ability, ability to assess need and generate program ideas, technical abilities related to adult education,
the ability to influence volunteers, the ability to influence faculty, and the ability to establish and display personal and professional credibility” (May, 1998, p. 209).

May (1998) also found that staff perceptions of the role of the professional in society were generally uninformed and it did not seem to have an important impact on the continuing professional education provided. Findings included that education may be a pervasive goal of the association and as such, may be organized into a single unit, or may be distributed in different departments. Association members were described as highly diverse representing a wide variety of expertise, career phases, and understanding of the association. Change was acknowledged as a constant and one goal of the associations studied was to help members keep updated to new knowledge, trends, and changes in practice (May, 1998).

Each study recognized the role of operational issues, or the business side of CPE. Technical skill as a meeting planner was mentioned by May (1998) and was discussed more fully by Wills (2001). Both studies mentioned evaluation as a facet of program tactics.

Strategic issues pervade both studies. These issues included how the organizational structure managed stakeholder roles and how power was managed between staff and member volunteers.

“Some associations are benefiting from a restructuring that places all educational functions, including the journal and products, under the direction of an educator so that there is a total coordination of print and program education and efficient use of resources. At the other end of the spectrum are associations whose activities are so fragmented that responsibility for the quality and success of the education output rests with the educator, and budget control for these same projects lies in other, non-educator controlled departments” (May, 1998, p. 262).
This observation provides insight into the interrelated role of education and the business of the association.

Managing power among volunteers working on the CPE program was addressed. Delegation of responsibility and a clear definition of the planning process understood by the key players, was found to positively impact not only the process, but attendee satisfaction. Another process impact was based on whether the CPE was “board led [or] board dominated?” (Wills, 2001, p. 103) thus addressing power and negotiation elements similar to Cervero and Wilson (1996).

The balance between education and the business need of the association to raise funds is informed by the following quote.

The …educational function operates from a comprehensive and strategic educational plan that is built upon a sound philosophical base and accounts for the duality of the education function seen in this research. The difference is that the educational curriculum drives the business aspects of education, not the reverse that is seen in current practice (May, 1998, p. 255).

According to Wills, shared governance or “decentralized authority” was the desired state suggesting that this was linked to member empowerment (2001, p. 91). Neither of these studies suggested a model of a strategic theoretical framework for CPE in associations.

Stakeholders were identified in a variety of ways but basically included both staff and member volunteers at varying levels. May (1998) interviewed the primary continuing education professional, that person’s supervisor, a support staff member, and one member volunteer and thus focused more on staff than volunteers. Wills (2001) focused more on volunteers but interviewed at least one staff person.

In both studies role clarity was found to be very important as was the need for empowerment and the ability for staff and members to “operate in partnership as peers,
occupying equal power positions... where technical expertise is essential to effective output” (May, 1998, pp. 267-268). A sense of inclusiveness, of stakeholder groups feeling heard and included in pertinent processes was related to empowerment (Wills, 2001). Even so, it is a bit of conundrum that it is the educator that must feed the correct information to volunteer committees to get an effective result. While the education staff serves the volunteer committee process, he/she must also help shape it, understanding large and small group dynamics in order to be effective. “The proper socialization and training of volunteers is critical to the association function and the education that is produced. It should be a subject of primary concern to effective educators” (May, 1998, p. 267). Thus, the role of both staff and member volunteers within association continuing professional education processes is complex, politically challenging, and certainly dynamic.

The role of education planner was central to both studies. The person in this role was found to need to be highly adept at the business of education and be able to establish credibility early with technical abilities as both an adult educator and technical meeting planner. For this individual, the dual roles of assessing needs and the ability to generate ideas were central. An education planner who is not an expert in the field on which the education focuses needs essential skills in adaptability and the ability to “take in information quickly” (May, 1998, p. 245). While there was no conclusion drawn as to whether key staff should be a practitioner in the field of expertise that the association represented, there was a strong suggestion that an expert in continuing professional education would support a strong planning effort (Wills, 2001). Staff in this role need special balancing and negotiation skills to be able to enact the will of volunteer leaders within the organizational political arena. Persuasive skills were found to be important to encourage and provide gentle instruction to speakers/faculty to ensure high quality programming (May, 1998).
However, without volunteer members, there would be no staff because there would be no association. It is important to remember that not only must members be willing to volunteer, but they need to find personal pride in belonging (Wills, 2001). Volunteer members were seen to need training on roles and responsibilities, but also on varied methodologies in planning and delivering education programs. One very important aspect of such training was to imbue new committee members with a clear understanding of the culture of the organization (Wills, 2001).

Another aspect of volunteers was to keep them engaged. “If the work of the association is dependent upon the quality of the member process, then the democratic process or the dialectic must be created and managed to produce desired outcomes. The ‘hopper’ must be kept in working order” (May, 1998, p. 212). Effectively nurturing member input is very important.

There is a staff/volunteer conundrum that can impact many aspects of both the working relationship and the overall program. While volunteer input is important, it is the staff that have to be most concerned with quality as they are accountable for it long after the volunteer is gone. “Association staff seemed to seek a fine line on the progressive edge of majority thought” (May, 1998, p. 213) balanced between cutting edge thought and majority comfort. While democracy may be a goal, not all volunteers or committees are equal. Some have more authority than others. Also, discussions toward consensus may not achieve it, nor may the ideas be able to be consistently articulated even when there is agreement. If volunteers were not fully capable of leading, staff often took up the slack. While member input, quality, and voice are important, there are bills to pay in order to support the work of the association; staff have to be concerned with efforts that generate funds (May, 1998).
These observations are consistent with the practice experience of the researcher in this research project and are viewed from a reflective practitioner perspective (Schon, 1983).

The May (1998) dissertation suggested that there was little research and guidance for professional educators serving associations. It focused on the roles of various players involved in the production of educational programs and the results were intended to increase understanding for effective practice. Wills (2001) dissertation produced concrete results useful in both identifying roles as well as planning elements pertinent to planning association conferences. Further, it provides a background and perhaps a list of ideas to probe when helping associations analyze their approach, roles, systems, and processes for continual improvement and to diagnose problems.

Recommendations included that program planners needed to meet adult learner needs through application of good adult education practice as well as cultural appropriateness where relevance to the attendee was found to be critical. Program planners should have “clear demographic information” concerning their association’s membership including industry segment, level of experience, years of experience and technical expertise (Wills, 2001, p. 104).

Other recommendations included addressing change, challenges, and continual improvement opportunities as well as the need to be flexible. The ability to forward plan for the development of volunteers and promotion to leadership roles, as well as the stability and consistency of staff that may hold historic memory of the organization are important elements that impact program planning success. In summary, “The challenge is to define internal systems that facilitate the evolution of the planning process, since the environment being served continuously evolves whether the planning structure keeps up or not” (Wills, 2001, p. 101). The findings of these two dissertation research
studies support the need for continued research in the arena of continuing professional education.

**Strategic Planning and CPE**

Against a background of adult education program planning models, associations and their professionalizing process, continuing education practice, and the business that CPE also is, it is likely the success of an association’s conference(s) is of crucial importance to the association. However, it is also important to remember that CPE is a process as well as a product. It is a vehicle of change in and of itself and is a dynamic interaction that engages staff and members while also representing the association to the larger world. How does an association know when it has employed the best process to gain the process/product success it endeavors to achieve? Against what does it measure?

This question actually goes a step beyond the focus of this study, but it is an important question to recognize simply because it is not addressed in the theoretical adult education literature, nor is it addressed in any research that could be found to inform this proposed research. Some insight may be suggested by the *7 Measures of Success: What Remarkable Associations Do That Other’s Don’t* (ASAE & The Center for Association Leadership, 2006), a data driven, research-based guidance for associations. The *7 Measures* represent strategic approaches and are not prescriptive. Described as three sets of commitments, they could also be characterized as attitudes that when employed, tend to help associations be more successful.

This then is more of a strategic approach to process. While CPE conferences could be envisioned as a product, it is the process that leads to the product in which this study is interested. Before embarking on a brief description of the *7 Measures of Success*, it is important to address two concepts that may have impact on an association’s approach to identifying successful strategies or may be elements that have
played a role in the success of their CPE efforts. These concepts are change theory and the diffusion of innovation. It is anticipated that elements of change or diffusion of innovations may arise during this proposed study’s investigation.

**Change.** Education has to do with change on many levels. It involves a learner moving from one place of understanding or proficiency to another. In organizations, it has to do with moving the organization from one way of acting or one approach to a modified or new approach. Organizational change issues may provide background for understanding continuing professional education in context.

Lewin was an early writer on change theory and his description of change in terms of force fields is a useful way of looking at change in organizations (as referenced in Brager and Holloway (1978)). This will be a somewhat oversimplified summary of Lewin’s perspective but at even a simplified level, it is pertinent to this research.

Change is needed when stresses are caused in a system and the current state of affairs is disrupted. In organizations, change stressors might come from many sources, but three were cited as having outstanding impact: the environment (external), internal arrangements, and perception of participants. Brager and Holloway (1978) bring this focus on change to human service organizations and much of what they write could apply to associations of most any type. They define organizational change as an alteration of any of three elements: people, technology, or structure of an organization. Of these, they suggest that technological and structural changes are probably representing bigger challenges with structural changes the most significant of all. If the change may become permanent or will impact many organizational elements it has an even greater impact.

A novel and somewhat different definition and approach to change has been described by Malcolm Gladwell in *The Tipping Point: How Little Things Can Make a Big Difference* (2002). This approach, though a bit unorthodox, may be very helpful to
organizations to discern how the past has impacted what is being experienced today. These ideas may also provide some insight into what is happening within a group (people change) when options are being debated. Following is a summary of these ideas. It may be useful to keep these perspectives in mind when interpreting this research. Additionally, these ideas may provide insights for probing questions during data collection.

According to Gladwell (2002), change is sometimes the result of contagious behavior. Change occurs because something *catches on*. A few people can create a big change. Some things catch on because they are “sticky” or people find it irresistible. The message itself *sticks*. Some things are contagious and the *contagiousness* is likely due to the messenger or the person behind the idea. The people who are the players in our lives – shape or influence it. [Researcher’s note: While this may seem to state the obvious, it is a critical idea to remember in organizational change situations. It depends *who is in the room* when things are discussed]. This is related to the concept of “getting the right people on the bus” (Collins, 2001, p. 41). It may be that several small changes combine to create a very big one. Innovators may try new things, but some very special people may play a big role helping others *connect with it*, they may *champion it*, or they may *sell it*. Individuals *position it*; individuals may make it *contagious* (Gladwell, 2002).

**Diffusion of innovation.** While change is with us every day and occurring at a seemingly ever increasing rate, whether or not a person or an organization addresses change is one thing. The second thing has to do with whether or not change is adopted. In an intriguing discussion on the diffusion of innovation Rogers says “an innovation is an idea, practice, or object that is perceived as new” and “diffusion is the process by which (1) an innovation (2) is communicated through certain channels (3) over time (4) among the members of a social system” (1983, p. 11). The rate of adoption is a time continuum and usually adopters are described as innovators, early adopters, early
majority, late majority, and laggards and the concept is generally depicted as a standard bell curve (Rogers, 1983, p. 247). “The two chief concerns of organized continuing education today in all occupations are the same: how to speed up the learning of the majority of adopters and how to reach the laggards” (Houle, 1980, p. 164). So, encouraging the adoption of change can be considered an intrinsic goal of CPE. The degree to which change is adopted could be a facet or a measure of success and may relate to organizational adaptability (ASAE & The Center for Association Leadership, 2006).

In this study we are most interested in what the organization does in planning its CPE conferences; issues relating to change over time may arise. Compared to a single person’s adaptability to change, organizational innovativeness is more complex and a bit harder to understand. Refer to Figure 7: Independent Variables Related to Organizational Innovativeness (Rogers, 1983, p. 360). In this model, centralization refers to the degree to which few or many hold power and control. Complexity has to do with the level of specialization, education, expertise of the members. Formalization explains how fast the group holds to rules and procedures. Interconnectedness has to do with the level of networks among members. And organizational slack has to do with the availability of resources that can be applied toward innovative efforts (Rogers, 1983, pp. 360-361). All of these things relate to organizational adaptability as well (ASAE & The Center for Association Leadership, 2006).

Also within this same model, we see that both individual leader characteristics as well as characteristics external to the organization are addressed. Individual characteristics toward innovativeness are well covered in the discussion above. It is important to remember however, that since continuing professional educators play many roles, the individual may interact with both change and innovativeness on many fronts, including researcher, teacher, editor, organizer, or administrator (Houle, 1980). External
characteristics are likewise important, but the most important to this study is the trait of system openness. In this research characteristics of these elements may arise and may potentially need this context for understanding and interpretation.

![Diagram: Independent Variables Related to Organizational Innovativeness](Rogers, 1983, p. 360)

**Strategic planning models.** Simerly (1987) offered a strategic planning model that suggests more than an operational approach. See Figure 8. Simerly's Strategic Planning Model (1987, p. 15), which incorporates the ideas of internal and external strengths and weaknesses, connection with organizational intent and mission, goals and objectives, the tactical plan, a discussion of resources needed, and a strategic approach to evaluation. It is the earliest strategic model that was found in the education literature, but there seems to be no apparent research to test its ability to measure success in application. This model starts with a management audit that incorporates both internal and external influences; the strategy then moves to clarifying values and consideration of mission. Goals and objectives lead to an action plan subsequently tested against whether the objective is feasible in light of resources. Once done, a feedback loop is initiated to inform a repeat of the project or suggest a new one. This model has some similarities to the model suggested in the _7 Measures_ model, described next.
Another model is suggested by the findings of the research that created the document, *7 Measures of Success* (ASAE & The Center for Association Leadership, 2006). Among the plethora of business literature, little is research based. However, there are two well documented, in-depth research studies that have found a niche in the popular literature as well. Jim Collins first lead a research team to find what it was that made some companies last, publishing *Built to Last: Successful Habits of Visionary Companies* (2002). Following that, a second research project lead to *Good to Great: Why Some Companies Make the Leap…and Others Don’t* (2005). This second research was intriguing to those working in social sector companies. How could these insights be applied to this sector, or could they? In a monograph to accompany *Good to Great*, Collins wrote, “We must reject the idea – well-intentioned, but dead wrong – that the primary path to greatness in the social sectors is to become ‘more like a business’” (Collins, 2005, p. 1). The findings of the research projected by Collins (2001, 2002) provide a data-driven distillation and guide to understanding which strategic approaches
seem to lead to success – in business. The difference comes down to money. In business, money is both input and output. In the social sector, money is only an input and performance becomes a measure relative to mission (Collins, 2005). In CPE, performance is in terms of program success.

Nothing is truer than the following, “Much of what we know about association management is based on anecdotal evidence, personal experience, common sense, and research from business and other sectors” (ASAE & The Center for Association Leadership, 2006, p. 17). Since pertinent research with direct application to the social sector was missing, ASAE (American Society for Association Executives) & The Center for Association Leadership, collaborating with Jim Collins, conducted a research project specifically for associations. The resulting book is *7 Measures of Success: What Remarkable Associations Do That Others Don’t* (ASAE & The Center for Association Leadership, 2006). Summary findings of this research are portrayed in Figure 9: 7 Measures of Success. These strategic success elements, derived from research data, are both simple and complex; it is the intersection of these characteristics that makes for remarkable associations.

Figure 9: 7 Measures of Success©, reprinted with permission (ASAE & The Center for Association Leadership, 2006)
The study was carried out by a task force which studied selected associations over the 15 years preceding and including 2003. Subjects had to have been in operation for at least 20 years during which they finished financially in the black more years than in the red, were able to retain members, donors and market share, and had had more than one CEO during that time period (ASAE & The Center for Association Leadership, 2006). Nine associations met the standard and were selected. Nine out of 105 others were selected a comparison group that were as similar as possible, but not as successful especially in the areas of member retention and financial health.

These eighteen organizations were arranged into nine matched pairs. The researchers identified 11 areas for comparison and analysis which included “vision (core values, mission, purpose, goals); markets, competitors, and the environment; organizational arrangements (structure, policies, systems); use of technology, business strategy; products and services; leadership (staff, elected); community and culture; financial health; physical setting and location; and public policy (ASAE & The Center for Association Leadership, 2006, p. 6). They collected multiple types of data, both quantitative and qualitative to test “which variables were most closely associated with sustained, outstanding organizational performance (ASAE & The Center for Association Leadership, 2006, p. 7).

Interviews were field tested and then conducted with the CEO, senior, and support staff. Documents including financials, product samples, minutes and the like, were gathered. Reviewers were association professionals who analyzed both the interviews and documents through the following filter, and I quote:

- What did you find that ran counter to conventional wisdom?
- What did all the organizations share in common? In other words, what are the necessities for any organization to be considered good?
What major elements accounted for the differences between the study and comparison groups? (ASAE & The Center for Association Leadership, 2006, p. 9).

After initial analysis a follow up visit to the CEO was conducted to attend to any gaps and better understand the culture of the organization. Cases were discussed and analyzed individually and collectively. The resultant list portrayed in Figure 9: 7 Measures of Success were selected if they were found to be significant elements in at least six out of nine subjects in the study group and not found in six out of nine in the comparison group. The study reported that these elements “represent commitments consistently honored by the organization, not just intentions, aspirations, or marketing messages” (ASAE & The Center for Association Leadership, 2006, p. 12). The resulting three commitments to (1) purpose, (2) analysis and feedback, and (3) action are explained more fully by two or three descriptors each as in Figure 9: 7 Measures of Success.

Commitment to purpose was described as (1) having a customer service culture, and (2) an alignment of product and services with mission. A customer service culture means that an attitude of providing excellent service to members is everywhere, not just in stated mission and values, but in how staff interacts with members, how programs are designed to the benefit of members (and not ease for staff), is based in mutual respect and pride, leads by example and is always on the lookout for how to do it better or more deeply. The organization is based in trust and treats people fairly. “No one presumes to decide what the member needs without asking first and then listening to the answer” (ASAE & The Center for Association Leadership, 2006, p. 26). The attitude pervades everything an association does and every decision it makes. The research report describes a customer service culture as, “we’re here to serve you’ approach [which] not only permeates all individual encounters with members but also is built into
organizational structure and processes” (ASAE & The Center for Association Leadership, 2006, p. 13).

Alignment with mission means that decisions are mission-driven and when the decision is between mission and money, mission wins. “Remarkable associations view members as a population to serve rather than a market to sell to” (ASAE & The Center for Association Leadership, 2006, p. 30) and they experiment with new ideas, but let them go if they are found to be unsuccessful, and learn from those experiences. One way to understand this drive to mission is by how this can be misunderstood. “[Misunderstanding associations] failed to link the mission to the development of strategic direction, operations, products, and services that would define who they are” (ASAE & The Center for Association Leadership, 2006, p. 29).

Commitment to analysis and feedback was described in three separate, but interconnected ways as measures three, four and five as follows: (3) data-driven strategies, (4) dialogue and engagement, and (5) CEO as broker of ideas. Each of these will be described more fully.

Data-driven strategies not only refers to internal or member data, but environmental data as well. It could come from formal or informal findings, quantitative or qualitative, or even anecdotal, but was always respected, analyzed, interpreted and what was learned was applied. It was not an annual or bi-annual effort, but a continuous approach. The example of not using this approach was portrayed as an association not realizing that its membership or its needs were changing, thus not taking action to adapt. Beyond organizational efforts at obtaining and using data, individual staff were described as careful listeners, gleaners of information that was subsequently shared. Due diligence is conducted on ideas to test their feasibility and data drives the decision on whether or not to “just run with something because it sounds like a great idea” (ASAE & The Center for Association Leadership, 2006, p. 40).
Dialogue and engagement means that there is a pervasive communications culture that does not suffer from the fragmentation that can be caused by thinking or acting in silos. Decisions are discussed openly and collaboration is the expectation, not competition. The organization and mission are consistently put first, not individual or departmental gain. There was a “clear understanding of organization identity and purpose” (ASAE & The Center for Association Leadership, 2006, p. 45) and “remarkable associations effectively maintain a class-less structure” (ASAE & The Center for Association Leadership, 2006, p. 48).

Describing the CEO, the head of the organization, as broker of ideas really means much more than that as it includes a commitment to a democratic approach that stimulates engagement, whereby everyone, members and especially staff, is listened to fairly, departmental silos are not only discouraged, but the CEO treats each department and staff fairly him or herself. The CEO needs to be able to stimulate “visionary thinking” and “to engage others in defining, refining, and responding to that vision and all it entails” (ASAE & The Center for Association Leadership, 2006, p. 49). Over all this, it is the member’s vision that is most important. By contrast, less successful CEOs “had a different view of the organizational culture than most of the employees who were interviewed” (ASAE & The Center for Association Leadership, 2006, p. 51).

Remarkable associations not only “…act strategically; they consistently implement their priorities” (ASAE & The Center for Association Leadership, 2006, p. 53) and the length or formality of their written strategic plans is less important than their actions in this cause. Further, everyone, both staff and volunteers, understood this commitment to action and made decisions based on it. There were two descriptors that further defined and described this commitment, and again, maintaining the numbering in the original findings these are (6) organizational adaptability and (7) alliance building.
Organizational adaptability is consistently related to core purpose. There will always be situations that arise that challenge the association. Remarkable associations tend to assess and react more swiftly whereas less successful associations just tried to do what they always have done by working harder hoping that this would solve the problem. In remarkable associations, there are no sacred cows and programs that are not aligned with mission are terminated yet these groups are also astutely aware of what should not be changed. This is related to the clear understanding of mission-driven thinking. Whatever the impetus or type of change, remarkable associations tend to be more apt to learn from the situation.

Alliance building is also related to a clear understanding and unwavering commitment to mission. Remarkable associations know their own strengths and bring self-confidence to the bargaining table. If the proposed alliance does not fit with mission, they walk away and do not make decisions based on financial goals alone.

The researchers in the 7 Measures study warn that they were working with a sample of only nine matched pairs, that the results suggest guidance but not prescription, and report that the seven measures were applied in ways unique to the particular organization. The research also provided some insight into commonly held beliefs which may be pertinent to CPE planning. These include the following selected findings. Strategic boards that based decisions on data were the most successful. Change is pervasive, but being proactive was less important than remaining true to core purpose. Successful organizations had CEOs who understood what was expected of them and matched themselves with the goals of the organization no matter what their prior experience. The CEO was a steward, but “was hired to facilitate visionary thinking and create a culture of possibilities” (Collins, 2002, p. 70). The debate as to whether member-driven is better than staff-driven was less important than being “data-driven and member-focused” (ASAE & The Center for Association Leadership, 2006, p. 67). Profit is
only one measure of success in associations. Unlike in Collin’s earlier work Built to Last, a “big hairy audacious goal” was not really important in associations (ASAE & The Center for Association Leadership, 2006, p. 69). “Mission drives research that reveals specific needs. The needs determine program, product, and service development, which are further evaluated to determine value” and all of this is governed by mission (ASAE & The Center for Association Leadership, 2006, p. 73).

In summary, a basic understanding of change theory, diffusion of innovation, and strategic planning models underpin an understanding of how associations function and some of the pressures that influence their actions. Success is important to any organization or business, and there is qualitative research-derived insight into drivers that are likely to support success for association type organizations.

**Qualitative Research**

Merriam and Simpson suggest that if the purpose of the research is to “…understand a phenomenon, uncover the meaning a situation has for those involved, or delineate process – how things happen – then a qualitative design would be most appropriate” (2000, p. 99).

This study in this dissertation is a qualitative research project. “The key philosophical assumption upon which all types of qualitative research are based, is the view that reality is constructed by individuals in interaction with their social worlds” (Merriam & Simpson, 2000, p. 97). The key elements in this type of research is understanding processes and how people interpret, and in this setting, the “researcher is the primary instrument for data collection and analysis [emphasis in original text]” (Merriam & Simpson, 2000, p. 98).

**Challenges and importance of practice research.** Interestingly while existing in the academic world where research leading to theoretical knowledge is fundamental, adult educators are more likely to be grounded in practice. This project can be
characterized as practice research and practice research has some special challenges. Existing research in adult education has tended to focus on structural/functional organization, but practice research is political, contextual, and practical where the adult educator researcher seeks understanding and practice improvement (Cervero & Wilson, 2006; Dirkx, 2006). Thus this study will address the “unruliness of actual practice” (Cervero & Wilson, 2006, p. 257) as it seeks to identify the program planning elements that practicing association meeting planners active in CPE conference planning actually utilize in developing their conferences. This section is devoted to describing qualitative research and focus group qualitative research in particular as it relates to this proposed project.

**Qualitative research and grounded theory studies.** This section will describe qualitative research characteristics applicable to this project, specifically grounded theory and specific analytical frameworks utilized in focus group research. First, however, it is important to clearly identify this research as centered in the more practical world of CPE practice.

A practitioner in the field of adult education cannot help but love the title of Robert Stake’s book, *Qualitative Research: Studying How Things Work* (2010). With 20 years’ experience in the world of CPE, I am interested in how CPE may be able to work better by understanding how it actually works now. “Professional knowledge is the lore gained from working with others having similar training and depth of experience. What especially characterizes professional knowledge is focus on the fact that how things work varies with the situation” (Stake, 2010, p. 13). Why don’t we know more about adult education CPE practice? It seems that this practice setting has not, itself, been the subject of much investigation, thus this proposed research will ask meeting professionals how they actually practice their craft.
Merriam (2009) lists the following types of qualitative research: basic, phenomenology, ethnography, narrative analysis, critical research, and grounded theory. Of all of these types, the one most similar to the intent and design of this project is grounded theory. First described by Glaser and Strauss, grounded theory can be described as “the discovery of theory from data systematically obtained from social research” (1967, p. 2). Seemingly simple in concept, designing an effective study from which relevant results can emerge, including systematic data collection and analysis which includes coding, building concepts from the understanding of coded data, relating concepts into a framework, and the potential to build theory from the results, is a robust research enterprise with well described decision-making, research processes, and techniques. There are a number of books and book chapters relevant to grounded theory research which offer theoretical and practical guidance (Boyatzis, 1998; Darkenwald, 1980; Glaser & Strauss, 1967; Merriam, 2009; Stake, 2010; Strauss & Corbin, 1998). Merriam, who is primarily known for her expertise in adult education knowledge arenas, writes “… although originating with sociologists Glaser and Strauss, grounded theory studies can now be found in nearly all disciplines and fields of practice” (Merriam, 2009, p. 31). Suffice it to say that this type of qualitative research is well documented, well accepted, and practiced in the field of education as well as in others.

Grounded theory is a good choice for research where insight into practice is the goal, as in this proposed research. “As a qualitative, exploratory method, grounded theory is particularly suited to investigating problems for which little theory has been developed” (Merriam & Simpson, 2000, p. 112), and the type of theory that is likely to emerge from the data in this type of research will tend to be more substantive than grand in nature and will more likely focus on real word situations. In addition, it is more likely to “have a specificity and hence useful to practice…and is particularly useful for addressing questions about process” (Merriam, 2009, p. 30). The quote above for which little theory
has been developed, seems quite contrary to the numerous models of program
development that exist, select ones of which are documented in this literature review.
However, with models numerous, but no research as to which models, or even which
elements of those models are actually used, we are perhaps faced with a deficit of actual
applied theory, only perhaps advice. “Ultimately, the use of grounded theory in applied
fields such as adult education is to improve professional practice through gaining a
better understanding of it” (Darkenwald, 1980, p. 69). Although published in 1980,
Darkenwald’s assertion that, “Much theory in the social sciences…is based not on
careful analysis of empirical data but rather on speculation and logical deduction from
sometimes dubious a priori assumptions” (1980, p. 66) is both interesting and applicable
here. This is the recurrent theme in this proposed research; many have proffered advice
on how to plan CPE, but it is seemingly only advice. This study thus uses grounded
theory to see what actually happens in practice.

In qualitative research, including grounded theory qualitative research, the
researcher is the instrument of data collection and analysis (Janesick, 1998; Merriam,
2009; Stake, 2010). There is the element of subjectivity and “it is interpretative,
experience based, situational, and personalistic” (Stake, 2010, p. 31). Qualitative
researchers may be interested in the “ordinary” to help them understand the topic that
they are researching (Darkenwald, 1980; Stake, 2010).

Incorporating a survey in grounded theory studies. One other aspect of this
approach to the research is the potential to incorporate a survey with grounded theory.
“The joint use of field and survey methods…enables the researcher to exploit the
advantages of both types of data while minimizing their weakness” (Darkenwald, 1980,
p. 76). This is particularly useful for this proposed research since there are some
limitations imposed by conducting the focus groups virtually. As will be explained below,
focus groups conducted in this fashion use fewer subjects in each and also use a shorter
time frame. It is important to move the subjects into a frame of thought ahead of time and a survey type instrument offers a reasonable solution.

One type of survey instrument is that of the semantic differential (SD). The original research for this instrument was conducted by Osgood, May, & Miron (1975) and published in the 1970’s. Its purpose is to measure attitudes across stimulus words, objects, or concepts in contrasting pairs. These are relatively easy to construct and present economical ways to obtain people’s reactions. Evaluation (good-bad, positive-negative), potency (strong-weak, heavy-light), and activity (active-passive, fast-slow), are the three dimensions that can be effectively measured by a SD scale (Heise, 1970; Osgood, May, & Miron, 1975). These instruments can be used with individuals or groups, and the instructions should explain the purpose and that the response is needed to learn how people feel, thus respondents should rate their feelings (Heise, 1970). Analysis of the semantic differential can be complex including cross-dimension analysis, or fairly simple with descriptive statistics such as range and mean in order to provide insight into the attitudes of the respondents (Heise, 1970).

Focus Group Research

Focus groups are a type of qualitative research. Originally designed for marketing, they have also been successfully adapted for use in academic, public/non-profit, and participatory fields in the last 30 years (Janesick, 1998; Krueger & Casey, 2009; Morgan, 1997). Morgan (1997, pp. 17-18) provides a very clear discussion of appropriate uses of focus groups including to “examine well-known research questions from the research participants’ own perspective….To clarify findings from another perspective” [in the case of this proposed research, theories and models], and “in issues of meaning than in precise numerical descriptions.”

Focus groups approach an investigation from a constructivist perspective (Merriam, 2009). Roulston (2010) lists six conceptions of interviewing approaches: neo-
positivist, romantic, constructionist, postmodern, transformative and decolonizing. She describes the constructionist approach as follows. Focus groups are a type of interview (Krueger & Casey, 2009).

The interviewer and the interviewee ⇒ Co-construct data in unstructured and semi-structured interviews ⇒ Generating situated accountings and possible ways of talking about research topics by the interviewer and interviewee ⇒ Researcher produces analyses of how the interviewer and interviewee made sense of the research topic and constructed narratives; researcher provides understandings of possible ways of discussing topics (Roulston, 2010, p. 59).

Focus group interviews typically have five characteristics or features: (1) people, who (2) possess certain characteristics, (3) provide qualitative data (4) in a focused discussion (5) to help understand the topic of interest (Krueger & Casey, 2009, p. 6). Focus groups have adapted to our changing communications environment and techniques for internet and telephone focus groups have been devised (Krueger & Casey, 2009).

Select analytical frameworks suggested by Krueger and Casey (2009) in their practical guide to focus group research are classified first by objective, then by typical uses, key tasks and processes. The types listed include constant comparative, key concepts, testing alternatives, critical incidents, and identifying individual change. Both the constant comparative and key concepts analytic frameworks are within the tradition of grounded theory. The constant comparative method of qualitative analysis was first published by Glaser in 1965 and reprinted with permission in Glaser and Strauss’ seminal text, The Discovery of Grounded Theory (1967). Oversimplifying here, this method has four steps including “(1) comparing incidents applicable to each category, (2) integrating categories and their properties, (3) delimiting the theory, and (4) writing
the theory” (Glaser & Strauss, 1967, p. 105). Krueger and Casey describe constant comparative in focus group research to include the objective of pattern identification and discovery of relationships between ideas or concepts, patterning and trending for similarities or differences (2009, p. 125). Their key concepts framework includes identifying factors and their relative importance, discovering core ideas and how the subjects view a topic and finding the important ideas or preferences that provide insight into the study’s goals. Both the descriptions of the constant comparative and the key concepts frameworks fit within the boundaries of grounded theory and elements of both approaches will be employed in this study to find the answers to the projects research questions: what program planning elements do association meeting planners utilize, and which are most important.

**Strengths and limitations in focus group research.** There are a number of criticisms and challenges to focus group research and its use is relatively new in academic research and in non-profit settings such as associations. By contrast, statistical research has both a longer history and multiple, widely accepted prescriptive approaches. Focus group methods have, however, been much improved and are now much more widely accepted. Since focus group research does not represent a sample, it cannot be generalized; its goal is explanatory. It is intensive, time consuming research requiring careful analysis, succinct writing, and directing findings pertinent to the research questions asked. It is both a challenging and time consuming research methodology (Janesick, 1998; Krueger & Casey, 2009; Merriam, 2009; Morgan, 1997).

One of the questions often asked of focus group research is whether respondents are providing full insight into their decision-making processes by the answers that they give in discussion. This is really a question applicable to any qualitative research that involves asking a subject questions and interpreting their answers and is not limited to focus groups. Ultimately, we can only know what they “tell”
us. Participants may tend to intellectualize, be unaware of what really drives their behavior if you are seeking behavioral information, or may make up answers (Krueger & Casey, 2009). Other potential criticisms may be that focus groups create results on which you cannot depend (Krueger & Casey, 2009). Again this could be a criticism of any research, quantitative or qualitative, and goes back to the rigor of the research design, its execution, and interpretation. Unlike qualitative research with individual interviews, the use of focus groups is special as it seeks to “collect qualitative data from homogeneous people in a group situation through a focused discussion” (Krueger & Casey, 2009, p. 15). Further, sometimes you learn things from discussion that may not arise in individual interviews; discussion can stimulate thoughtful response and provide deeper insights through the process of discussing.

Even so, there are perspectives on focus group research that help explain it to those that are unfamiliar with the approach, or who have questions simply regarding its academic appropriateness. Focus group research is generally designed to limit the question(s) in such a way as to exclude extraneous influences so you can understand the concept being studied without outside influences. This type of research seeks to both control and predict. What if, however, there is a phenomenon in which the range of potential questions is not able to be limited or focused? Focus group research uses carefully selected small groups “to provide understanding and insight” (Krueger & Casey, 2009, p. 199) on topics that are not explicit. The research proposed here is this type of research. It is a way not to be limited in what may be discovered.

Since this is qualitative research, questions can arise concerning the need for researcher neutrality and subjectivity (Krueger & Casey, 2009). In order to address this, the research will be conducted according to systematic procedures for data collection, review, and analysis. The questioning route for the group was field tested and revised slightly. The researcher probes for better understanding when responses are not clear.
Once the researcher has processed the results so that she is confident that they are “an accurate reflection of what the group participants said” the project remains open to “alternate interpretations” (Krueger & Casey, 2009, p. 200).

**Validity.** Construct validity refers to “identifying correct operational measures for the concepts being studied” (Yin, 2009, p. 40) or that it actually measures what it purports to measure. Some ways to address this are to use multiple sources of evidence, to request a review of the data or draft from key informants, to request examination by a peer or authority, to clearly describe possible researcher experience and/or bias, and/or to gather enough data over time to ensure deep understanding (Merriam & Simpson, 2000; Salkind, 2000; Yin, 2009). Internal validity refers to “casual relationships…can the researcher infer a cause-and-effect relationship” (Huck, Cormier, & Bounds, 1974, p. 224).

Since focus group research is descriptive and not suited to determining causal relationships, internal validity has a different meaning from quantitative research. This research is interested in making inferences. The researcher needs to consider how or if the evidence converges, and whether there may be rival explanations (Yin, 2009). The question is whether all the evidence is considered thoroughly and with consistent rigor.

In experimental designs, external validity refers to the generalizability of the findings (Huck, et al., 1974; Merriam & Simpson, 2000; Salkind, 2000). These research projects rely on statistical generalization. By contrast, qualitative research relies on analytic generalization to some broader theory. It would be thus appropriate for findings in a focus group project to suggest further research and to provide insights for subsequent probing (Yin, 2009). This research is not designed to generalize but it may consider whether the findings can be used in or “transfer” into other situations, depending on the situation (Krueger & Casey, 2009, p. 203).
**Reliability.** Reliability is the ability to get the same results if the study is repeated. This, again, is more difficult in qualitative research because the number of subjects is limited and it would be very hard to do the exact same project with someone who has already been a research subject: the original contact itself would impact the results. To address this concern, the approach needs to be very clear and documentation consistent, saying, “the general way of approaching the reliability problem is to make as many steps as operational as possible and to conduct research as if someone were always looking over your shoulder” (Yin, 2009). Further, research subjects are a purposeful sample because the investigation needed subjects with specific experience.

**Interviewing and questioning.** Interviewing, whether individual or in a focus group, is a guided conversation that must stick to the purpose of the study. The characteristics of this type of interview are a carefully worded questioning route, but one in which probing is expected (Krueger & Casey, 2000; Yin, 2009). The goal is to target the relevant how and why questions. Good questions should support the interviewer’s efforts to establish a connection with the participant, make them comfortable, seek common ground and purpose, and start easy, but get to the critical questions quickly. Questions should thus “include good directions, sound conversational, use words the interviewee would use, be clear and not pretentious, are easy to say, are clear, are short, are usually open-ended, and are one-dimensional” (Krueger & Casey, 2000, p. 40). On a more mundane note, it is generally important to obtain some demographic data from each interviewee in order to establish the appropriateness of the subject and insight into the subject’s experience pertinent to the study. This information would be obtained before the focus group as part of ascertaining the suitability of the subject for the focus group’s purpose.
The literature describes characteristics of qualitative interview questions as generally including descriptive questions, follow-up questions, example questions, clarifications, probing questions to supplement to something the interviewee stated, comparison/contrast questions, employing such ideas as think back, moving from general to specific, and remaining consistent (Janesick, 1998; Krueger & Casey, 2000; Morgan, 1997; Yin, 2009). Focus groups start with opening questions that are designed to make group participants comfortable, followed by introductory, transition, key and ending questions in a carefully thought out questioning route relevant to the study subject. These questions are designed to engage the participant.

**Interviewer is the instrument by which data are interpreted.** An investigator should be carefully prepared, able to both ask good questions and listen carefully to the answers, be adaptive and flexible, which necessitates an excellent grasp of the study design and purpose. An unbiased and ethical investigator is essential (Janesick, 1998; Yin, 2009). There are further challenges in interview research involving literally how much to report or how much to write to support the evidence. The findings are the words of the subjects. Merriam and Simpson suggest including quotes and “rich, thick descriptions …that persuade the reader of the trustworthiness of [the] findings (2000, p. 101). It is the interviewer that has to bring all of his/her senses to the need to understand all that has been gathered from the interview and be open to findings not anticipated (Janesick, 1998; Krueger & Casey, 2000; Merriam & Simpson, 2000; Yin, 2009).

**Collecting and managing data.** When focus groups are conducted, they are recorded and purposeful notes are taken. After each focus group, responses to each question are summarized by writing a “descriptive summary of what each…said in response to the question [or item]” paying attention to frequency, specificity, emotion, and extensiveness (Krueger & Casey, 2000, p. 136). This is important while the memory
is fresh. Then the recordings are transcribed. There are generally two persons collecting data, the moderator and a co-moderator.

Qualitative research conducted through focus groups, like any other research, must be clearly described, well documented, and able to be understood by the researcher(s). Similarly, other researchers should be able to verify the process and arrive at similar conclusions by examining the documents and data (Krueger & Casey, 2000). Krueger and Casey further recommend scheduling the focus groups so that there is time to transcribe and summarize question by question. In this way the researcher will find areas where a question was not clearly answered thus making the researcher more aware for the next group (Krueger & Casey, 2000).

The goal of focus group research could be to identify patterns or relationships, identify individual change, explore critical incidents, test among alternatives, or to identify key concepts (Krueger & Casey, 2009). Actual analysis, unlike other forms of research starts after the first group is held in case you need to clarify the way a question is asked. Notes taken during the focus group, transcripts, and discussion between moderators following the focus group are all analyzed to identify themes and patterns paying attention to frequency or how many times something was said, specificity, emotion, and extensiveness or how many people said something (Krueger & Casey, 2009).

In all research, if rival explanations should arise they should be addressed. Rivals, in this particular research may include investigator bias, rival theory, a super rival (includes researcher’s notions, but is a bigger situation than posited by researcher), and societal trends. Applying this system addresses all the evidence, allows for rival interpretations, and permits significant aspects to reveal themselves (Yin, 2009).

**Data Coding.** Data analysis consists of examining, categorizing, tabulating, testing or otherwise recombining evidence, to draw empirically based conclusions. Analyzing evidence requires finding patterns in responses (Yin, 2009). No matter what,
the analysis needs to be “practical, systematic, and verifiable” (Krueger & Casey, 2000, p. 126). Understanding and employing good data coding practice is critical to effective interpretation.

The coding process is central to the management of data. “Coding is nothing more than assigning some sort of shorthand designation to various aspects of your data so that you can easily retrieve specific pieces of the data” (Merriam, 2009, p. 173). However, as simple as this appears, the process of coding is more than this as it leads from the smallest piece of information into a picture of what the data portrays through the analysis. The coding should both reveal relevant information as well as be the smallest piece of evidence that can stand by itself (Merriam, 2009). If the purpose is to compare concepts, then coding must also be something that is large enough to represent a concept that can be compared with other concepts.

In thinking about coding, the definitions offered by Strauss and Corbin are especially helpful and oft cited in the literature:

- “Open coding: The analysis process through with concepts are identified and their properties and dimensions are discovered in the data;”
- “Concepts: The building blocks of theory;”
- “Properties: Characteristics of a category, the delineation of which defines and gives meaning;” and
- “Dimensions: The range along which general properties of a category vary, giving specification to a category and variation to the theory” (Strauss & Corbin, 1998, p. 101).
- “Selective coding: The process of integrating and refining the theory
- “Theoretical saturation: The point in category development at which no new properties, dimensions, or relationships emerge during analysis
• “Range of variability: The degree to which a concept varies dimensionally along its properties….” (Strauss & Corbin, 1998, p. 143).

The coding scheme must be relevant to the study/topic, and that it is very important for the researcher to also keep track of the thoughts and hunches that occur to him/her and a journal has been suggested as a method for organizing one’s thoughts (Janesick, 1998; Merriam, 2009).

There are some thoughtful descriptions on achieving effective and accurate coding. Boyatzis advises that “a good thematic code is one that captures the qualitative richness of the phenomenon…. A good thematic code should have five elements:

• A label (i.e. a name),
• A definition of what the theme concerns (i.e. the characteristic or issue constituting the theme),
• A description of how to know when the theme occurs (i.e. indicators on how to ‘flag’ the theme),
• A description of any qualifications or exclusions to the identification of the theme
• Examples, both positive and negative, to eliminate possible confusion when looking for the theme” (Boyatzis, 1998, p. 31).

Coding of concepts thus is a way to begin constructing categories (Merriam, 2009). Strauss and Corbin (1998) call this axial coding. Please see Figure 10: Analytical or Axial Coding. As data codes collect around categories or themes, patterns build.

“Categories are conceptual elements that ‘cover’ or span many individual examples…. Categories are abstractions derived from the data, not the data themselves” (Merriam, 2009, p. 181). Categories then become another type of data that needs to be defined in a similar to coding and should be organized as described by Boyatzis (1998). At this phase, the researcher is employing inductive processes and this requires going back to
the data, analyzing additional data as it comes in, reasoning through the new data in light of the existing data, and hopefully reach saturation, a point at which you are no longer seeing anything new (Merriam, 2009).

Category names can come from the researcher, the participants, or from the literature. Additionally they should (1) “be responsive to the purpose of the research” (2) “exhaustive” that is, all data fits, (3) “mutually exclusive,” (4) “sensitizing” or have meaning in relation to the data, (5) “conceptually congruent” or having a reasonable organization, and not, to use a common metaphor, be comparing apples with bread, but apples with pears (Merriam, 2009, pp. 185-186). Charting or designing matrices may be a useful way of visualizing congruence (Strauss & Corbin, 1998).

![Diagram of Analytical or Axial Coding](image)

Figure 10: Analytical or Axial Coding (Adapted from Merriam, 2009, p. 181)

Categories lead to the more deductive part of the process of analysis which is more theoretical and may benefit from model building or visual representations (Merriam, 2009). At this stage, the answers to the research questions should emerge.

**Summary of Literature Review**

The literature review has addressed adult education and program planning models in adult education. The number of theoretical models abound, but little research
on application and usefulness of these models has been conducted, or at least little has been reported in the literature.

Associations play a special role in adult education which can be called Continuing Professional Education or CPE. CPE is a huge endeavor by associations and it is big business with financial and reputational consequences to the organization overall. CPE in associations often takes the form of conferences to serve the educational needs of members and is supported by meeting professionals (staff) as well as member volunteers. Little is known about CPE practice among associations. What guidance is available was written some time ago, and while there is some research on association best practices, there is precious little on CPE in the form of conferences.

The literature review also addresses a focus group research approach. This study is grounded theory research, from a constructivist orientation, utilizing focus groups with credentialed association meeting planner staff in the United States who have at least one annual conference attracting 250 participants or more. It utilizes an online medium in which the focus groups are conducted.
Chapter Three -- Methods

Introduction

This chapter describes the research methods employed to answer the research questions. It addresses the study research sample, data collection, semantic differential survey designed to stimulate thinking prior to the focus group interview, focus group format and questioning route, and analysis. It further addresses limitations such as bias, validity, reliability, and generalizability. Assumptions and ethical considerations are also addressed.

First, however, it is important to set the stage for the research questions. The literature review has established that there are many continuing professional education conferences conducted each year and that beyond learning aspects, it is big business. The literature review has also described a number of select adult education planning frameworks. There are also “conference books” and “business books” with many good ideas that usually make logical sense and seem to provide practical insights or good advice. However, at this point, it is only advice. It is not until a researcher asks what actually occurs in practice that we can know which theoretical framework or what advice is actually employed. To this researcher’s knowledge, in the field of adult and continuing education outside of the allied health field which was not included in this study, there is little research on what planning elements continuing professional education programs in associations actually utilize, nor do we have much data on what those in practice believe works best. Perhaps the field is so big and so pervasive that we have not noticed that we actually have only limited data.
**Statement of the Problem**

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

**Purpose of the Study**

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

**Research Questions**

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

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

The theoretical framework for this project is that scholarly-derived program planning models offer guidance to association CPE program planners, but we don’t know which elements of those frameworks are actually applied in practice. The study employs the elements of grounded theory to identify key concepts that emerge through analysis of focus group discussions among association conference planners to develop a model of program planning in practice. This qualitative research uses a constructivist orientation. It is not intended to be generalizable, but it is hoped that findings might help identify which elements are utilized, which are not employed, or if there are others not yet identified. Further, by its design it seeks to determine if some elements are deemed more important than others in practice.

Study Research Subject Derivation


The Convention Industry Council (CIC) (2010) is a membership organization of associations only, not individuals, and it provides an online list of meeting and convention planners that have earned the CMP. An inquiry was sent to this organization in March 2011 requesting access to the CMP list as potential research subjects and the request received no response.

The Professional Convention Management Association (PCMA) describes itself as “the leading organization for meeting and event professionals” and its mission
statement is, “To deliver superior and innovative education and promote the value of professional convention management” (PCMA, 2011). Further, “headquartered in Chicago, PCMA represents 6,200+ meeting industry leaders from more than 35 countries and has 17 chapters throughout North America. Our members include planner professionals, suppliers, faculty and students. Aside from students and faculty, members are categorized as either a professional or supplier based on their position” (PCMA 2011).

The Society of Government Meeting Professionals (SGMP) describes itself as follows, “Our mission is to enhance the knowledge and expertise of government meeting professionals. Our objectives are to improve the quality of, and promote the cost-effectiveness of, government meetings. SGMP is the only national organization in the U.S. dedicated exclusively to government meetings. SGMP delivers our membership value of education, resources and networking to nearly 4,000 members and through 31 chapters nationwide” (2011).

Meeting Professionals International (MPI) describes itself as “the meeting and event industry’s most vibrant global community, helps its members thrive by providing human connections to knowledge and ideas, relationships, and marketplaces. MPI membership is comprised of more than 23,000 members belonging to 71 chapters and clubs worldwide. Its vision is to build a rich global meeting industry community, and its mission is to make our members successful by building human connections through: knowledge/Ideas, relationships, and Marketplaces (2011b).

Of these four organizations, individuals can only be a member of three as the CIC is only an association of organizations. This researcher has been a member of all three of the remaining groups and has maintained a continuing membership in MPI for 16 years. In addition, MPI has the largest membership base and thus provides the largest number of potential subjects. A critical factor in selecting MPI is that the
researcher has immediate access to the directory of fellow members and members’ 
CMP or CMM credentials are readily apparent in their listing, along with email addresses 
and/or telephone numbers enabling contact. An initial foray into cold calling some 
members resulted in a confirmation that individuals would be willing to participate. Thus, 
this research sample is limited to meetings professionals holding either the CMP or 
CMM designation and belonging to MPI (Meeting Professionals International, 2011a).

**Human Subjects’ Protection**

This study complied with University of South Florida requirement by the 
researcher’s completion of required courses, followed by application to, and approval by 
the Institutional Review Board (IRB). Potential study participants were approached 
verbally and by email, providing the approved informed consent document and ensuring 
that it had been received and any questions answered.

Care was taken to protect the identity of participants. At the end of the study, and 
upon request, each participant was offered an electronic copy of the executive summary 
and/or final dissertation to be electronically delivered upon final approval and 
acceptance by the University.

**Focus Group Subject Selection and Delimiters**

The U. S. Department of Labor’s Occupational Outlook Handbook defines 
*Meeting and Convention Planners* (SOC code 13-1121) extensively, but summarizes the 
definition in one sentence, “Planners coordinate every detail of meetings and 
conventions, from the speakers and meeting location to arranging for printed materials 
and audio-visual equipment” (Bureau of Labor Statistics, 2010-11). Workers in this 
classification comprise the subject pool for this research project. Subjects are limited to 
those belonging to a well-known professional association, Meeting Professionals 
International in which the researcher is a 16-year member which provides access to 
fellow members as subjects. Members provide profiles as a part of their membership
application and update them during their annual renewal. Those parameters allow
effective selection of some of the delimiters in this study. Thus, the potential subject pool
for this study include MPI Members holding the CMP and/or the CMM industry
certification(s), who work for an association type organization in meeting
planning/training/education, hold annual or educational meeting(s)/conference(s) in the
United States where attendance is 250 or more. Once the list of all potential MPI
Members was determined, a random numbers program was applied to the list to
minimize selection bias (Krueger & Casey, 2009).

The sample for this study was thus a purposeful and strategically selected
population. Merriam defines as follows, “Purposeful sampling is based on the
assumption that the investigator wants to discover, understand, and gain insight and
therefore must select a sample from which the most can be learned” (2009, p. 77). “In
random sampling, every unit in the population has an equal and independent chance of
being selected for the sample” (Glass & Hopkins, 1996, p. 226).

**How Many Focus Groups to Conduct?**

The goal is to reach saturation, that is, where the results of successive groups no
longer present new information or range of ideas (Krueger & Casey, 2009). In this
research project, a total of eight focus groups were identified in the research plan
submission to the Human Subjects Review Board, and this plan was approved. All eight
focus groups were conducted and analyzed. The question as to whether the eight
groups reached saturation will be addressed in Chapter Four -- Findings.

**Methods of Data Collection**

There are a variety of ways to collect qualitative data. Merriam and Simpson
(2000) list three: interviewing (most used in adult education research) with semi-
structured interviews the most prevalent, observation, and document review. It is
suggested that these methods be applied as much at the same time as possible.
This study utilized one of these components, interviews in the form of focus groups with Certified Meeting Professionals (CMPs) and Certified Meeting Managers (CMMs) who work for associations and who have responsibility for meetings of over 250 participants. Observation would involve extensive time, perhaps a year or more, multiple travel efforts and its concomitant cost, and most importantly, would not likely reveal insights more attainable through discussion. There were no documents to review since it is individual practitioners who are the subjects. Evidence through interviews is perceived to be a rich form of research data and based on the review of literature, and is thus a credible approach. As earlier reported in the review of literature, focus group research has evolved from its inception as a commercial marketing inquiry to successful use in both academic as well as nonprofit research (Janesick, 1998; Krueger & Casey, 2009). This proposed research will utilize a single category design with multiple, similar groups.

The researcher’s faculty committee\(^1\) approved a pilot focus group to precede the eight focus groups in the actual study. The pilot focus group included a subject pool similar to the proposed pool in that they were meeting professionals currently involved in meeting planning and belonging to MPI. As a result of this experience, some implementation factors were slightly changed and these are reported early in Chapter 4 - Findings.

Additionally, a semantic differential survey was constructed, using the literature on adult education program planning and association success factors, as a means of helping focus group participants come to the virtual focus group “table” more prepared, and to overuse the term, focused. The challenge was to stimulate thinking ahead of time so that the time spent in discussion was more likely to reach key issues more quickly. The survey was distributed to subjects prior to the scheduled date of the focus group,

\(^1\) Agreed to by all faculty at meeting held 6 May 2010.
collected, and analyzed with descriptive statistics, as described in Chapter Four -- Findings.

**Recruiting**

After the list of potential research subjects was determined, a random numbers program was run and applied to the pool to help avoid selection bias (Krueger & Casey, 2009; Merriam & Simpson, 2000; Salkind, 2000). It is understood that even by randomizing the subject pool that this study cannot lead to generalizable findings because the subject pool was a strategic and purposeful sample. Krueger and Casey address the issue of a strategic sample saying that when focus group interviewing within an organization, which can be used to describe the subjects in this study, the researcher develops “a pool of people who meet screening requirements and then randomly selects from this pool” (2009, p. 185). It is a systematic sampling of an identified group or representative group (Glass & Hopkins, 1996), albeit not the universe of possible CMP or CMM holders, but only those who also belong to MPI.

Once the random numbers program had been applied to the subject pool, subjects were called in order following the protocol denoted in Appendix A: Protocols. This included (1) describing the focus group purpose and ultimate goal; (2) collecting demographic data on the potential subject, verifying their suitability to participate; (3) describing the online nature of the focus group, and the need to record the session which required internet accessibility; (4) arranging to provide equipment (headset with microphone) as a thank you gift, incentive, and needed equipment; (5) introducing the semantic differential survey; and (6) describing the one-hour focus group.

Demographics collected from each research subject verified that the subject met the study delimiters. This information included the organization for which the subject currently works, number of years in that current position, and total number of years in the industry. Contact information was verified for name, mailing address so that a headset
necessary for participation can be mailed to the subject, phone number(s) and email address(s).

The Focus Group Discussion

The proposed questioning route is detailed in Appendix B: Focus Group Questioning Route. It begins with some ground rules, followed by very brief welcoming questions/introductions to get everyone acquainted, relaxed, and to encourage open group discussion. There is one basic question followed by four questions asking participants to consider the issue from differing perspectives to elicit ideas perhaps not yet shared. During discussion, the researcher/moderator kept a list on a second monitor not visible on the shared GoToMeeting screen. At the opportune time in the discussion, the list was shared for verification and ranking by importance. That is, participants were asked to rank each element that they had contributed according to a scale of (1) most important, (2) moderately important, and (3) least important. Consensus was sought during this exercise, but when consensus could not be reached, a secondary rating and reasons were noted. Concluding questions asked each participant to identify anything left out and for the most important thing said during the discussion. An email of thanks was then sent to each participant, offering them a chance to request a copy of the executive summary when complete.

Online focus group practicalities. Focus groups were held using online meetings software. “You can even do a valid and high-quality case study without leaving the telephone or internet, depending on the topic being studied” (Yin, 2009, p. 15). The discussions, held online, were both recorded within the online medium and real-time notes were taken by a professional transcriptionist.

Focus groups were scheduled and conducted over the internet using GoToMeeting. This software works in the following fashion. The researcher logs into the software and creates hyperlink that can be distributed by email. At the scheduled time
the researcher activates the meeting by logging into the online meeting link. Participants also simply click on the link provided and enter the virtual meeting room on their own computer. This can be described as a shared workspace and has presentation capabilities (often called a white board). That is, the researcher can portray documents that participants can see and what is being typed onto the researcher’s screen can been seen by all who are logged in, in real time.

All discussion and any documentation on the white board was recorded in GoToMeeting and automatically converted to Windows Media Player which allows easy subsequent access. Discussants spoke together using Voice Over Internet Protocol (VOIP). In order to support VOIP, a USB-connected headset with microphone was used though there was an integrated telephone number available as backup. Using VOIP eliminates need for telephone long distance charges and allows for exceptionally easy digital recording of the session as it is a built-in feature of the software. Anyone who needed to use the telephone option was also recorded.

USB headsets were offered to each research subject, and mailed to them both for use on the call and to keep as an incentive and thank you item. Costs of these devices was around $20.00 each. The researcher tested the software and the VOIP in a pre-interview short meeting with every participant which allowed for answering any questions that arose, and solving any technical problems before the actual focus group discussion. Costs for headsets and postage were provided by the researcher.

During the focus group the researcher and the transcriptionist both took notes. The transcriptionist, acting also as assistant moderator took notes on a computer capturing as much of the conversation and quotes as possible in real time. This was tested in the pilot focus group and worked very well. The process was aided by the fact that the software actually lists the speaker’s logon name when they are speaking so that the transcriptionist could accurately identify each speaker. When the focus group was
concluded, the researcher and transcriptionist discussed the group and this was recorded. Transcripts were delivered within a few days and were subsequently verified against the recording by the researcher. Transcripts were sequentially line numbered and each focus group transcript was printed on different colored paper for identification by group. Participants were identified in the transcripts by real first name, and subsequently identified in analysis and quotations by pseudonym. Further Focus Group A had pseudonyms for participants all starting with the letter A, Focus Group B, with B and so on.

The co-moderator was an experienced transcriptionist/typist with experience in focus group transcription and participation. She also happened to be a meeting and event planner and a member of MPI.

Analysis

Demographics. Some descriptive demographics were collected primarily to provide understanding of participants’ current perspective and historical experience. These descriptions appear in Chapter Four – Findings, for each group and also in the aggregate. Demographics include type of association, job title, years in current position, years in industry, a description of their typical conference projects, and where they learned their meeting planning skills.

Grounded theory coding and analysis. Grounded theory and coding was discussed in the literature review, but the coding and analysis aspects utilized in this study are described here. The first and most important aspect of the approach to data analysis is that, unlike quantitative studies, grounded theory studies are advised to being coding and analysis as soon as there is data available (Darkenwald, 1980; Glaser & Strauss, 1967; Merriam, 2009; Strauss & Corbin, 1998). These authors describe the process as an iterative one, and one author suggests that, “At various points in the process of analysis, researchers are likely to feel confused, unsure of what to do next, or
eager to consolidate their thoughts” (Darkenwald, 1980, p. 73). Being comfortable with ambiguity as the analysis progressed was an important factor in the researcher’s approach. This has some similarity to working with groups planning a project they cannot quite initially envision when they first come together. This researcher has often served such groups, listening, excerpting themes, and guiding people to see the commonalities in their sometimes repeated discussions, and eventually bring it together to build a program.

The definitive work on analyzing data for this study is contained in Glaser and Strauss and is described as the constant comparative method (1967); it is explained in detail in Strauss and Corbin (1998). The following framework portrayed in Table 8: Data Coding, briefly summarizes whole chapters in the Strauss and Corbin (1998) with abbreviated definitions of elements of the constant comparative approach to coding and how they are applied in this research project. These include open, axial and selective coding and each of these is described with a working definition, how this coding is applied in this study, and some notes outlining possible implications.

This portrayal is a bit simplistic but will serve to convey the coding pathway; the actual coding process will be detailed, require repeated examination of the data, and involve other, related approaches such as researcher memos to self, diagrams as relationships emerge, and other strategies to help the analysis emerge the theory. Journaling or a system of researcher memos is recommended (Janesick, 1998; Stake, 2010; Strauss & Corbin, 1998).

The process of data analysis for this project as Merriam describes is “emergent” and “collection and analysis is recursive and dynamic” (2009, p. 169). Robert Stake provides another insight for qualitative research with the concept of Verstehen, to borrow a German word. He describes it thus, “Verstehen is an experiential
Table 8: Data Coding

<table>
<thead>
<tr>
<th>Element</th>
<th>Working Description</th>
<th>As Applied in this Study</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Coding (Chapter 8)</td>
<td>Identifying concepts, their properties and dimensions and marking these in the transcripts. This represents the ‘tearing apart.’</td>
<td>Termed categories and subcategories, these are the basic elements of program planning that will hopefully result from the focus group discussions</td>
<td>It is possible that other factors may arise in the discussion outside of just elements of program planning that may have importance to the overall process.</td>
</tr>
<tr>
<td>Axial Coding (Chapter 9)</td>
<td>Linking categories and subcategories as these linkages emerge. This represents the first part of ‘putting together.’</td>
<td>In this study this will probably be the linking of individual elements of program planning into logical groups, the logic coming from the discussion.</td>
<td>The axial coding may mirror elements of program planning suggested by the models in the literature, they may not, or there may be new or different ones.</td>
</tr>
<tr>
<td>Selective Coding (Chapter 10)</td>
<td>At this point the deductive process of open and axial coding turns instead to inductive reasoning and theory can begin to be constructed.</td>
<td>This is the beginning of the integrative process when elements of the theory, or perhaps in this study, a model of program planning practice in CPE as it is actually practiced in associations begins to emerge.</td>
<td>It is possible that the results will verify a model or combination of models existent in the literature, or that a new one of some kind may be developed. It is possible that new elements not here-to-for suggested in existing models may arise. The researcher must be open.</td>
</tr>
</tbody>
</table>

This table is excerpted from Strauss and Corbin (1998).

understanding of action and context” (2010, p. 48). It implies something deeper than surface understanding. In some ways it suggests the difference between a CPE program planning model in the literature and an understanding of how staff and member volunteers actually do it – the goal of this research.

The data analysis plan for this proposed research also utilized the concept of model or matrix building (Merriam, 2009). “By developing a model of what occurred, the reader of the report is more able to make sense of the data and follow the researcher’s argument” (Janesick, 1998). Please interpret model to include tables, drawings or illustrations, i.e. iterative tools to help understand the data.
“Theoretical saturation (is) the point in category development at which no new properties, dimensions, or relationships emerge during analysis” (Strauss & Corbin, 1998, p. 143). Though designed to seek saturation, the limited number of both subjects and focus groups may or may not be enough to bring the analysis to a point where saturation is assured. This actually will not be known unless the study is repeated in a similar fashion, or perhaps translated into a quantitative study with an open-ended section to identify any elements missed in this study.

**Focus group analysis plan.** Congruent with grounded theory studies, focus group analysis should began immediately upon the concluding of the first group, analyzing for patterns and themes, coding the results as themes emerged. To some extent this was accomplished as the lists of elements developed during the focus groups themselves were coded. However, the overall coding and analysis actually began in earnest upon completion of the final focus group. Most of the following detail on the analysis plan comes from the description of a classical analysis strategy for focus groups as suggested by Krueger and Casey (2009, pp. 119-125).

The bulk of the material to be analyzed included word-for-word transcripts for questioning route questions, a transcript of the debriefing discussion held by the researcher and transcriptionist immediately at the end of each focus group, and the spreadsheet of elements identified by each focus group along with the rating of each element’s perceived importance. Reading and re-reading both the transcripts and the spreadsheets was the first step in analysis.

Each transcript was color coded by group. Transcripts were line numbered using the line numbering option in Microsoft Word. Spreadsheets were also printed on a colored paper matching the color assigned to that group. Analysis started with a description of each group’s demographics and elements identified. It then went on to an analysis of each questioning route question. Did the groups answers the question,
answer a different question, says something of importance, or was what was said like something already said. Was what was said based on the question asked, and/or did it provide insight into the perspective of the speaker?

The next step was to process the discussions in a different way, letting the elements emerge. Transcripts were literally cut apart based on topic, taped to the element on the spreadsheet to which the discussion related. Piles were made based on the code assigned to the element. This process provided a way to understand, arrange, rearrange, and make categories or sub-categories. While this could have been accomplished using computer or electronic coding, the physical handling and subsequent visual representation aided the analysis. As the piles grew, the more important ones became evident. The next step was understanding concepts.

Several factors were considered when analyzing the elements now cut apart and arranged and re-arranged into literal piles. These factors were frequency, specificity, emotion, and how many different people said something (Krueger & Casey, 2009). Over time, concepts emerged from the process and tables of related elements and could be more clearly named. This process resulted in the identification of elements practicing association meeting planning professionals utilize, thus allowing the research questions to be answered. Quotes were very helpful at providing perspective and insight both during the process and in presenting the findings.

The final part of the analysis to be described in Chapter Four – Findings, will relate back to the various planning frameworks in the review of literature noting if the frameworks suggested in the literature converge or diverge with actual practice, and what the implications may be suggested for future inquiry.

Limitations

There are several limitations in this study. The first is bias and there can be several types of bias or bias-like problems: poorly articulated questions, response bias,
poor recall, or an interviewee answering what he/she thinks the researcher wants to hear (Krueger & Casey, 2009; Merriam & Simpson, 2000; Salkind, 2000; Yin, 2009).

If we accept that the researcher is the primary instrument for qualitative research, meaning that the researcher collects and is responsible for analysis and selecting the key findings, it is important to note any potential bias and project its possible impact on the study (Krueger & Casey, 2009; Janesick, 1998; Merriam & Simpson, 2000; Yin, 2009). Some possible sources of investigator bias for this study are acknowledged. The investigator has approximately 20 years’ experience working in the field of CPE conferences and this includes work with multiple associations, government entities, university divisions, and collaborations among these groups. It is the researcher’s intrigue as to what may underlie successful conferences that originally led to interest in this proposed study. The researcher’s ideas of what she thinks may be important will need to be suppressed to hear what the participants actually say. Being centered in the field of the research has its advantages, but in this case, it could also be a biasing factor.

Another important limitation which has been carefully covered in the literature review is that this study’s findings cannot be generalized. Results do not describe cause and effect, but seek to provide insight and understanding and perhaps suggest insights for further investigation. The purpose is deeper understanding. As long as the results are interpreted and applied with these cautions in mind, this research can inform practice.

**Summary of Methods**

This study utilized online focus groups with credentialed association meeting planners to determine what is actually done in practice. It is based on grounded theory in a constructivist orientation to ask those who are doing, what they actually do, and then to compare those findings with models in the literature. It seeks to provide on model of actual practice.
Chapter Four -- Findings

Introduction

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

Thus the purpose of the study was to identify the elements that practicing meeting planning professionals in associations utilize in CPE conference planning. Further, this study is interested in which are considered the most important elements. This resulted in the following research questions:

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

To obtain the data to answer these research questions, eight separate groups of three to six discussants each, participated in on-line focus group discussions, one-hour in length,
following a prepared questioning route. The participants were a select group of meeting professionals.

Participants. In total, this research involved 40 individuals participating in eight, online focus group discussions held from June 22, 2011, through August 24, 2011. Subjects were recruited from the membership of Meeting Professionals International (MPI), a membership group of suppliers (such as hotels, audio visual companies) and planners (those who purchase services). MPI was selected because the researcher, a member of MPI, had access to the membership directory. Subjects were further limited to MPI planner members with the designations of Certified Meeting Professional (CMP) and/or the CMM, Certificate in Meeting Management. The potential list was limited to association type planners rather than corporate or other types of planners to minimize differences caused by type.

A pilot focus group was conducted on June 30, 2010, with four participants as a fifth, though scheduled, did not join. The costs of headsets, postage, software, hardware, and transcription for the pilot were combined into the cost of the overall project, reported later. The data from the pilot is not included in the analysis, but insights obtained from it, summarized later in this description, were important to improving the processes used with the actual research groups.

Semantic differential survey. Immediately prior to the focus group itself, participants in that specific group were asked to complete a semantic differential type survey for the express purpose of encouraging and focusing thinking on the questions that were to be discussed during the actual focus group hour. The semantic differential, see Appendix C: Semantic Differential was intended to focus on strategic rather than logistical planning elements as a means of encouraging thinking on the strategic level
rather on the elements of tactics or logistics that comprise hotel orders. Focus group discussion questions were provided to discussants at the same time as the survey was distributed, about three working days prior to the scheduled focus group call. The questions were provided to encourage thinking on those questions ahead of time to maximize discussion time directly on topic. All but one participant completed and returned the survey prior to the discussions.

**Conducting the focus groups.** Each focus group was one hour long and conducted online using the web-based program, GoToMeeting. This program provides a no-cost, voice-over-internet-protocol, or VOIP, option accompanied by an integrated, long-distance (not toll free) telephone number. When a meeting is scheduled within the software, a unique hyperlink or URL is provided along with a special integrated telephone number unique to that URL. When the hyperlink is clicked, a menu appears requiring a small program download and then allows the participant to log in. Once logged in, the participant is given access to the initiator’s, in this case the researcher’s, computer screen so that the researcher could share a presentation in real time. The participant, using a headset with microphone, can speak with other participants, or if the participant could not make the headset work, could still fully participate by calling the unique phone number. VOIP and phone participants could hear each other and all participants and all voices could be recorded. Among the participants, all joined using VOIP except Fran in Focus Group F and Halie in Focus Group H. Participation by telephone was necessitated due to delayed postal delivery of the headset or technical challenges, but there seemed to be no observable limit to their participation as a result of using the telephone as a medium. They could still see the same computer screen the researcher was sharing.

1 Hotel orders is the term applied to the minute-by-minute, day-by-day set-up needs that a planner creates and sends to the hotel. For a three-day conference hotel orders may well be in excess of 50 pages of very detailed instructions.
As an incentive as well as a tool for the research, participants were provided a headset with boom microphone mailed to them using two-day, priority, United States Postal Service mail, which was tracked with a confirmation option. Once the headset was received, a “test” GoToMeeting was scheduled to ensure that the small program download was successful, that the headset worked, that computer settings were properly adjusted so that sound was received over the headphone, that the microphone was engaged, and that the participant felt comfortable with the GoToMeeting program and headset. This was done to help prevent software and hardware challenges on the day of the focus group. As there were very few technical challenges faced during the actual focus groups, this was time well spent.

In all, 45 headsets were sent to a final group of five pilot participants, 40 research participants and 2 potential participants who were never able to be fit into a scheduled group. Two participants declined to be sent headsets as they used their own and were very experienced using VOIP. Two different headset brands/types were used. Gigaware headsets with USB plugs were purchased at $20 each and Cyber Acoustics brand headsets at $15 each with dual plugs (microphone and speaker plugs) were also purchased and used. Total cost for headsets was $1,120 which included headsets for the transcriptionist and research committee to assist with their understanding of this process. Total postage costs were $442. The cost for the GoToMeeting subscription, at $49 per month for four months ($196), as well as headsets and postage were paid for by the researcher.

Focus group participants were emailed the questions to be addressed in the group about three working days prior to the discussion. These questions follow:

1. Tell us who you are, briefly describe your role in planning one or more conferences for your association, and name one thing you like most about working in conferences.
2. Can you briefly describe the conference(s) you plan each year?

3. Planning a conference requires thinking about many things, let’s call them planning elements. I would like us to make a list of all the elements you consider or discuss, assuming your goal is to create the best continuing professional adult education conference possible.

4. Prompting Questions
   
   o Would you add any other elements if planning a new conference rather than an annual or repeat one?
   
   o Sometimes there are planning elements that are especially challenging?
   
   o Are there elements that you or your association you are considering adding?
   
   o Likewise, are there any planning elements that you used to do that you no longer do?

5. I have been taking notes on the elements you have listed. I am going to show them to you on the screen now and I would like you to take a minute to look these over. Please let me know if you would like to make any changes or additions to the list.

6. Can we organize these into three categories? Most important, moderately important, least important?

7. Thinking about our discussion today, is there anything that was left out that you would like to add?

8. Of all the things that we talked about today, what do you believe was the most important thing that was said about planning the most successful CPE conference possible?

   Each focus group was scheduled to be one hour in length and all were kept to almost exactly that length of time. Participants were asked to log on 10 minutes prior to
the actual start time to both be prepared and to solve any last minute technical problems. A Power Point presentation (see Appendix D: Power Point) guided the discussion. Power Point notes pages were developed and printed for each focus group and the researcher worked from the computer screen as well as from the printed notes pages. Further, the notes pages were hand annotated with the time allotted to each part of the hour, specific to the start and stop times for that group. That is 3:05, or 11:20, for each particular schedule to enable staying to time allocated to each question and end on time, as promised. A promise to end on time was a vital element for convincing potential participants to join the research. Additionally, online discussions require more intense concentration than face-to-face meetings. The researcher’s professional work experience included managing multiple online discussions most work days, where the one-hour limit had proved in practice to be highly important to obtaining participation as well as to ensure productivity. After about 60 minutes, people in those work-related groups would begin to drop off and the discussion seemed to become less productive. Also, these research subjects were very busy; a promise to start and end on time allowed them some trust that their contributed time would be highly respected in light of competing demands.

Research data was comprised of discussion transcripts and spreadsheets, video recordings of the presentation screen married with the sound recording, and the semantic differential. Transcripts were typed by a professional transcriptionist in real time during the actual focus group. The researcher and transcriptionist would log on about 15 minutes before the start time, and the researcher would provide the actual first name of each expected discussant. Each focus group was also recorded using the built-in, GoToMeeting recording option. Immediately after participants left the focus group at its conclusion, the transcriptionist and researcher briefly discussed the focus group and this discussion was typed into the final transcript as it provided insights into the
discussion. Once the GoToMeeting was turned off completely, the GoToMeeting program automatically processed the recording into Windows Media Player file format (.wmv) and saved it in a pre-determined electronic folder. The recording was then subsequently checked and then backed up to a designated exterior hard drive. All files for this research were backed up a minimum of weekly over the course of the project. The computer and backup drive were kept in a safe when not in use as a security feature.

The transcripts were delivered, electronically, in Microsoft Word within a few days following the focus group. The researcher subsequently verified the transcript by listening to the discussion and making any additions, corrections, or edits. Charges for this transcription service totaled $1,125, including the pilot.

Each focus group was identified by the letters A through H for the eight groups. To protect the confidentiality of the participants, pseudonyms were assigned to each participant and those pseudonyms are used in this report when quotes are provided. To make tracking easier, all participants in Focus Group A were assigned a pseudonym beginning with the letter A, Focus Group B with pseudonyms starting with the letter B, and so on.

Total out-of-pocket cost for this research for GoToMeeting software subscription ($49 per month for four months), headsets purchased ($1,120), postage ($442) and transcription ($1,125), and foot pedal for processing original transcripts against recordings ($20 used), totaled, $2,903.

**Insights from the pilot focus group.** Participants in the pilot focus group were recruited from colleagues and members of the Tampa Bay Chapter of Meeting Professionals International (MPI) and other similar groups. Efforts were made to recruit association meeting planners, similar to the target population for the overall study. Additionally, a call for participants was posted on list serves and social media outlets
including the American Society of Association Executives and the local Meeting Professionals International newsletter. Five participants were recruited: two from the Tampa Bay area and three from other states. Of the five recruited, only four attended the focus group.

One of the participants in the pilot was a fellow student. This participant and the transcriptionist, herself a meeting planner, both provided written feedback. The researcher was most interested in procedural findings that were pertinent to the quality of the process. Findings and changes made included:

- Remember to explain that cross talk or discussion among participants is encouraged.
- Introduce the transcriptionist early in the discussion and define her role.
- Instructions were amended to log on to GoToMeeting with first name only, omitting last name and email address and changing these stored preferences if previously used by the participant. GoToMeeting indicates, on screen, who is speaking by how the person logged on. If full names were used at logon, the full name was displayed and this violated the confidentiality of the participant.
- It was very important to ask each group, at the start, not to multi-task by reading their email, for instance, but to only focus only on the discussion.
- The researcher used two computer screens, but only one screen was shared with the focus group participants. While the discussion was ongoing, and the discussants were developing their list of planning elements, the researcher was capturing those elements in an excel spreadsheet for use in rating each element. It proved beneficial to type the list of planning elements being created by the group discussion off the shared screen rather than in front of the discussants and
later share the screen with them for review for accuracy. Typing in front of them during the pilot seemed to inhibit discussion.

- The semantic differential was difficult to understand when administered in an electronic, online format, so it was recreated as a simple Word document that could be easily completed and returned as an email attachment.

- Several benefits of the software were discovered. GoToMeeting recorded what was showing on the computer screen paired with the discussion ongoing at that moment in time. A visual pairing of what was being discussed with the actual discussion makes the intent of the comments more obvious in later review. In addition, GoToMeeting shows who is speaking by literally posting their login name on the GoToMeeting menu. This made capturing who was speaking much more for accurate for the transcriptionist.

The files and documents created for the pilot were suitable for use in the focus groups, with some editing. These were designed for accurate and consistency both in data review and communication with potential and actual participants, to consistently meet Human Subjects Review Board requirements, and for accurate data collection across subjects and individual focus groups. These are referenced below, more or less in the chronological order employed. Some samples appear in the Appendices as noted.

- A filterable participant spreadsheet for tracking potential and actual participants was complex and consisted of the following items:
  
  - Random Number
  - Yes / No / Maybe / Other (participation likelihood)
  - Association, Corporate, or other
  - Date contacted
  - Notes on contact outcome (spoke with, or indication of participation or call back, left message or voice mail, etc.)
• First and Last Names
• Phone and Email
• Job Title and Company
• City and State
• MPI Chapter
• Headset Sent, Received, and Tested Dates
• Survey returned Date
• Pseudonym assigned
• Final Report Desired?

• Appendix E: Initial Phone Call Script.

• Appendix F: Approach Email. An email was needed to accompany the phone approach. This email restated the invitation to participate and included the Informed Consent Document and had as its subject line, “Requesting Help from MPI Planners (xxx).” Note that (xxx) signified a unique number and was inserted in each individual email to tag it with the number of that particular potential participant on the Excel spreadsheet. This aided tracking.

• Appendix G: Scheduling Email. An online scheduling tool was used to find mutually agreeable times among subjects who had agreed to participate. See a sample email using the scheduling tool Doodle.com (Näf, 2011).

• Appendix H: Focus Group Outlook Invitation. GoToMeeting had its own scheduling feature which integrated with Microsoft Outlook calendar or other electronic calendars, to actually schedule the call. Once scheduled it allowed participants to acknowledge the invitation and electronically accept it. Accepting automatically inserted it into their calendar, with the meeting link embedded. Further, it was set to remind them to logon 15 minutes ahead of time.
• Appendix B: Focus Group Questioning Route, previously described, was devised to create a discussion pathway for the purpose of eventually answering the research questions of this study.

• Appendix D: Power Point was a presentation to guide discussion with the questioning route embedded.

• Appendix I: Planning Elements Spreadsheet was a template that could be used for each discussion. It was this spreadsheet that the researcher used to capture the elements during discussion, and later shared with discussants on-screen for verification and rating according to importance.

• Appendix J: Communication and Reminder Emails are a collection of various emails pertinent to the process and include samples of some of the following communications:
  o Email sent three days prior to each focus group, with Semantic Differential Survey and discussion questions;
  o Email reminder to submit Semantic Differential Survey which was sent if not received at least two hours prior to focus group start time; and a
  o Thank you note and query to see if participants wished to receive a summary of final results. This email also contained an invitation to submit any ideas they wished subsequent to the conclusion of the focus group and if omitted due to time, a request to share what the participant thought was the most important thing said.

Recruiting

Introduction. Recruiting participants was very time intensive. Recruiting began on May 9, 2011, and was completed on July 29, 2011, when the eighth focus group was fully populated. This was almost 12 weeks, though the first focus groups were held as
soon as a suitable number of potential subjects were identified. Thus, recruiting and holding focus groups were somewhat concurrent.

**Subject pool.** The subject pool included all current MPI planner members holding either the CMP or CMM designation of which there were a total of 2,382. Once this list was created, a random numbers program, *Research Randomizer* (Urbaniak & Plous, 2011), was applied to the list providing the order in which potential participants were approached. The approach involved a phone call (see Appendix E: Initial Phone Call Script) and an email (Appendix F: Approach Email) that reiterated the phone script and had the Institutional Review Board’s approved Informed Consent information (see Appendix K: Informed Consent). This email had an email signature that provided the information to allow the recipient to search the MPI membership directory for the researcher’s information for credibility and verification of her status as fellow member.

All calls were made using Skype as it was VOIP and allowed use of a headset thus leaving hands free for taking notes efficiently, and no per call cost for long distance since the researcher had a subscription for outgoing calls. To make the calls more identifiable and credible, the researcher’s phone number was listed in the Skype profile and would show as the number called from on caller identification systems.

The master list from which the calls were ordered included all planner members at Meeting Professionals International holding the CMP or CMM certification as of May 9, 2011. Since MPI is an international organization, a number of entries represented non-United States members who were eliminated as this study was limited to United States participants only. The study was also limited to association type planners as the type of planning is quite different if the planner is working in the arena of conferences where election to attend is optional (association type) rather than a company (corporate type) where attendance is likely mandated and all costs of attendance is funded by the corporation. Association type planning is likely to be a revenue-generating endeavor,
which is very different than a meeting where all costs are covered by the employer and the impetus for the event is business-driven. In many cases, it was quite easy to determine if the potential participant was association or corporate by the name of the company. Corporate planners were eliminated without contacting the MPI Member. Other types of planners were also eliminated including destination management companies, and music event planners, among others.

See Table 9: Potential Subjects, for a summary of how the 2,382 possible participants resulted in a final list of 42 subjects, 40 of whom participated in the eight focus groups. Of the total 2,382 names on the list, 434 did not fit the profile/unsure if fit profile or did not respond, and the remaining 1,829 were not contacted because the participant pool was filled. Of potential participants who did fit the profile, 47 did not respond to the phone or email inquiry, 18 said no, three said yes and were scheduled but were no-shows, nine said yes, and subsequently said no, two agreed but could never be scheduled due to time constraints.

Table 9: Potential Subjects

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total names on list</td>
<td>2,382</td>
</tr>
<tr>
<td>Did not fit profile, unsure if fit profile, or did not respond</td>
<td>434</td>
</tr>
<tr>
<td>Total not contacted because participant pool filled</td>
<td>1,829</td>
</tr>
<tr>
<td>Association potential participants who did not respond</td>
<td>47</td>
</tr>
<tr>
<td>Association potential participants who said no</td>
<td>18</td>
</tr>
<tr>
<td>Total no shows</td>
<td>3</td>
</tr>
<tr>
<td>Yes, then no</td>
<td>9</td>
</tr>
<tr>
<td>Agreed, but never scheduled</td>
<td>2</td>
</tr>
<tr>
<td>Total final number of actual participants</td>
<td>40</td>
</tr>
</tbody>
</table>

**Screening the list.** Initially the researcher made calls to every name on the list, in order. It soon became evident simply by looking at or researching the name of the potential participant’s company on the internet, whether the potential participant was
likely to fit the profile of an association type planner or one of a number of other types. Association type planners who fit the profile worked directly for an association or professional society, or were what is known in the industry as third party planners, those who contract planning services, and in this case, specialized in, or provided services to, the association market. Other types not included as association type planners included the following categories as they emerged during pursuit of the list: consultants to the industry, corporate planners, cruise planners, destination management company employees or owners, government planners, hoteliers, incentive planners (those who plan sales trips to wonderful destinations for sales people who meet or exceed sales targets, for instance), international planners who lived abroad, MPI staff, music festival organizer, site-selection-only companies, other suppliers to the industry such as audiovisual companies, tradeshow only planners, or university planners. Some on the list were not immediately able to be classified and were listed as unknown and simply asked in the telephone and email approach.

Demographics. Demographics were collected from each participant including number of years in their current position and total number of years in the industry. Participants were asked to describe their current role, the typical conference(s) for which they were responsible, and how they obtained their meeting planning expertise. Individual focus groups’ demographics are described individually by focus group, and then summarized cumulatively later in this chapter.

Scheduling. Focus groups were scheduled at a time when participants who had previously agreed to participate could be available. To do this, a free, online program called Doodle (Näf, 2011) was utilized. This program allows the organizer to select a series of times to be communicated by email to prospective participants. When the prospective participant clicked on the link, they arrive at a browser where they can see the potential times and are able to click to indicate when they are definitely available or
when they could be available, “If need be” to use the language used in the program [British]. This program was selected over several others as it contained an optional setting that permitted only the organizer to see the results thus maintaining confidentiality among potential subjects.

To use this program, an email with the link to suggested times was sent to the list of the potential subjects using the blind-copy feature in the email program so that again, confidentiality among prospective subjects was maintained. Scheduling was done this way out of respect for the time of the potential participant. Once six of the prospective subjects selected one of the times and dates proposed, the focus group was scheduled. An email was sent to each confirming the date and time followed by a calendar entry that additionally carried the date, time and GoToMeeting link, which could be accepted and thus inserted into the subject’s calendar while at the same time creating an acceptance that could be tracked by the researcher.

**Semantic Differential Survey: Purpose and Description**

A survey document in the form of a semantic differential was utilized with the focus groups and distributed within three business days prior to the actual focus group itself. Consisting of 36 dichotomous items and seven options on a continuum between those dichotomous items, it was constructed based on the literature on adult education program planning (Caffarella, 2002) and association success factors (ASAE & The Center for Association Leadership, 2006). It was utilized as a means of helping focus group participants come to the virtual focus group “table” more prepared and to overuse the term, focused. The instructions and a sample of the items appear in Table 10: Semantic Differential; see the total instrument with bibliographic sources annotated in Appendix C: Semantic Differential.

The purpose was to stimulate thinking ahead of time so that the time spent in discussion was more likely to reach key issues quickly. From the researcher’s practical
experience, planners often focus on logistics which are certainly important and take a
great deal of time. It was hoped that these discussions would focus more on strategy
than those logistics. Thus the semantic differential asked for a rating between
dichotomous opposites among more strategic considerations instead of logistical ones. It
seems to have a positive effect in accomplishing this goal as will be seen in

Table 10: Semantic Differential

<table>
<thead>
<tr>
<th>Focus Group Survey -- Please complete this brief survey quickly answering thoughtfully but quickly; your first impression is best. There is no right or wrong answer. Please simply put an X in the box that best describes your current situation. Please save and return....</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>We follow an articulated program planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We do not follow a specific program planning process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our planning process focuses on practical matters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our planning process focuses on strategic matters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our program planning process is very stable and has not changed much from year to year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our program planning process continually is evolving</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our program planning process is very open</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our program planning process is a closed system</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

the results section of this narrative. The specific results of the semantic differential are
reported later in the findings section of this document, noting the average difference from
the neutral score of four on a seven-point scale over all eight focus groups collectively.

Individual Focus Groups: When They Took Place, Who Participated

Focus group A. Focus group A was scheduled and took place on June 22, 2011, with five participants, one dropping out for a total of four discussants on the call, all female. Participants were given the pseudonyms Apple, Andrea, Allison, and Arden. Years in current position ranged from five to 22 and averaged 12.5 years. Years in the industry ranged from 17 to 25 with an average of 20.5. Cumulative years at the current position were 50 and cumulative years in the industry were 82. One participant worked
for an international association, two participants worked for state associations and the fourth was a third party contractor who had served the association industry. Job titles included owner, vice president, director, and planner.

Their roles ranged from primary meeting planning without direct-report staff to a manager of a division that included other education such as training and had direct-report staff. The group as a whole described their experience and training as on-the-job, through mentors, through MPI and other membership groups who similarly provide training and education, study for the CMP designation, and one had graduated with a bachelor’s degree in a field that included tourism management, a related field.

The conferences planned ranged from 225 to 4,000 attendees, from two programs a year to 130, and included education programs, committee meetings, and exhibit halls.

**Focus group B.** Focus Group B was scheduled and took place on June 29, 2011, with six participants, with one dropping out for a total of five discussants on the call, three female and two male. Participants were given the pseudonyms Barbara, Betty, Brad, Bess, and Ben. Years in current position ranged from three to 20 and averaged 11 years. Years in the industry ranged from seven to 24 with an average of 17. Cumulative years at the current position were 55 and cumulative years in the industry were 87. Three participants worked for different types of associations, one regional, one state and one city, and two worked for third party contractors serving the association industry. Job titles included specialist, manager, director (two of these) and president. Their roles ranged from primary meeting planning without direct-report staff to a supervisory role at the strategic level.

The group as a whole described their experience and training as on-the-job, three mentioned study for the CMP designation, another started in what in the industry is known as *supply side*, as a hotel employee in sales and convention services, two
mentioned a mentor, and one mentioned starting as an administrator in the pharmaceutical industry. In addition, two specifically mentioned MPI and one also mentioned another membership group which similarly provides training and education.

The conferences planned ranged from 1,500 to 15,000 attendees, the number of programs each year by participant was not consistently mentioned by participant, but one respondent said her organization did 500 to 600 programs a year. The programs on which this group worked included training programs/classes, staff retreats, sponsorship, tradeshows, education programs, and black tie events in addition to, or as part of their conferences. One participant worked on many government-funded programs.

**Focus group C.** Focus Group C was scheduled and took place on July 7, 2011, with six participants, and all who were scheduled actually attended. Three were female and three male. Participants were given the pseudonyms Charles, Carl, Cynthia, Curtis, Crystal, and Cathy. Years in current position ranged from one to four and averaged almost two years. Years in the industry ranged from 9 to 25 with an average of 16. Cumulative years at the current position were 11.5 and cumulative years in the industry were 96. One participant worked for a national association, four were third party contractors serving the association industry and one, now corporate, had most of his experience with associations. Job titles included principal, executive vice president / COO, three directors, and one manager. All of these participants reported that they all “plan meetings A to Z,” as described by Cathy. Only two mentioned that they had direct-report staff, another was retired from an association, now operating her own meeting planning business for select clients of her choosing.

This group had a very wide background. Detailed descriptions of where they started in the hospitality industry that led them to their current position is illustrative of the diversity of meeting professionals and will be presented in some detail.
Charles started in the hotel business while in college, and then was employed by a traveling, road-show type program. From there he went to a corporate planning environment in the medical communications industry, and after that to an association setting.

Carl started as a houseman\(^2\) at a hotel, rising to a convention services\(^3\) position. He also worked as a third-party planner before working for his current national association.

Cynthia worked for a medical association, then a destination management company\(^4\), and then sales for an event management firm before her current position.

Curtis worked in pleasure sales\(^5\), then group sales for a major hotel firm, and now works for a third-party planner with assignments in the association sector.

Crystal started as a graphic designer, and while employed as a designer, obtained a position in the same company as a planner and now owns her own meeting planning company.

Cathy also started working in a hotel, but through mentorship learned the planning side and now works planning for associations.

Only two mentioned obtaining some of their job knowledge from MPI.

The conferences planned ranged from 350 to 13,000 attendees, from one annual meeting to nine events a year, and included pre- and post-conferences, education

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\(^2\) A hotel houseman is involved with the maintenance and cleaning of hotel rooms and function space.

\(^3\) Convention services positions in hotels are those hotel staff serving as the direct contact for meeting planners who have contracted space. They are responsible for translating the needs of the meeting planner’s hotel orders into a format that the hotel uses and distributing them to the various areas of hotel systems for implementation.

\(^4\) A destination management company or DMC is a company that has an expertise in a city or area and serves as a contractor resource for meetings located in that area. For instance, they frequently manage complex transportation services for very large conferences.

\(^5\) Pleasure sales is selling travel arrangements to individuals. This position would help you plan your honeymoon or special vacation.
programs (plenary and breakouts), business sessions, legislative sessions, tradeshows, and committee meetings.

**Focus group D.** Focus Group D was scheduled and took place on July 19, 2011, with six participants, all originally scheduled attending the call; all were female. Participants were given the pseudonyms Dana, Danielle, Doris, Dawn, Daisy, and Darcy. Years in current position ranged from one to 12.5 and averaged four years. Years in the industry ranged from four to 21 with an average of 13. Cumulative years at the current position were 12.5 and cumulative years in the industry were 92. Four participants worked for different types of associations, one international, one national and two state associations, and two worked for third party contractors serving the association industry. Job titles included two directors, two senior meeting planners, account manager, and one simply had the title of meeting planner. All reported that their roles included full service meeting planning, and two mentioned having direct-report staff. One participant made a point of noting that she had a lot of responsibility for member volunteer committee work.

The group as a whole described their experience and training as on-the-job (punctuated by group laughter), and trial and error, or perhaps trial by fire, as Debbie quipped, “First job out of college [was] working in meeting and events as an admin and I helped with meetings and got a view [of the work]. At this [current] company, I stated four days before the annual meeting⁶. Trial and error. [A special] personality is needed to manage this type of business.” Three mentioned study for the CMP, another started in what in the industry is knows as supply side, first at hotel, and then as a convention and visitors bureau employee in sales and convention services. One participant explained that a mentor was crucial to her learning, and one described herself as self-taught.

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⁶ Annual meetings of an association are generally understood by industry insiders to be incredibly intensive, time-consuming, and politically challenging projects. An Annual Meeting is likely the premier gathering of the association leaders as well as members.
Another person noted that she had a business degree. In addition, two specifically mentioned MPI and one also mentioned another membership group which similarly provides training and education. One noted that she was now a speaker, providing education in the industry to others.

All of these participants described quite complex conference offerings on which they worked and their descriptions focused on their largest. Of these, the smallest was for about 400 participants with education and breakout sessions. One of the largest was five days long, had an exhibit hall of 400 exhibitors, and included an accredited education program. Another described hers as hosting 20,000 attendees over five days with a three day exhibit hall and about 400 scientific sessions. This group described their work strictly in terms of conferences and did not mention any other types of education programs on which they worked.

**Focus group E.** Focus Group E was scheduled and took place on July 21, 2011, with six participants, all participating. All six were female. Participants were given the pseudonyms Elaine, Elsa, Edith, Eileen, Elinore, and Emily. Years in current position ranged from three to 25 and averaged eight years. Years in the industry ranged from nine to 25 with an average of 13.8. Cumulative years at the current position were 49 and cumulative years in the industry were 83. Three participants worked for national associations, two worked for state associations and one worked for a third party contractor serving the association industry. Job titles included manager (three of these), planner, senior planner and president. Participant roles were varied and included (1) primary meeting planning without direct-report staff, (2) golf education along with a tournament for a golf association, (3) not only planning an annual conference, but also supporting sub-groups of the association in their meeting planning efforts, (4) focusing on only a part of the project, namely business-to-business meetings and networking
endeavors, (5) providing outsourced full meeting planning in a menu format, and (6) providing planning services internally for meetings held in an association-owned venue.

The group as a whole described their experience and training as on-the-job, four mentioned study for the CMP designation, another started in direct sales, one studied at a for-credit program, one started in advertising obtaining a job in meetings within that industry, and one started with a degree in international relations, landing a first job in an international association. All six specifically mentioned MPI and one also mentioned two other membership groups which similarly provide training and education.

The majority of these participants had conferences with less than 1,000 attendees; however one participant described their annual program as attracting 17,000 attendees and 5,000 hotel rooms on peak night. Three mentioned that their programs included trade shows, otherwise known as exhibit halls. The number of programs each year by participant was not mentioned. The programs on which this group worked were primarily conferences with the largest one termed a “city-wide.”

Focus group F. Focus Group F was scheduled and took place on August 8, 2011, with five participants, one dropping out for a total of four discussants on the call, all female. Participants were given the pseudonyms Faith, Faye, Fran, and Florence. Years in current position ranged from one to 11 and averaged five years. Years in the industry ranged from five to 29 with an average of 21. Cumulative years at the current position was 20 and cumulative years in the industry was 84. Three participants worked for different types of associations, one national and two state, and one worked for a third

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7 This means that the group for whom the planner is contracted selects from a menu of services which could include full-service meeting planning, or it could be for only certain, select services.

8 The number of hotel rooms “on peak” is a common industry description indicating the complexity of a conference. It means that on the biggest participation day, the program needs 5,000 sleeping rooms contracted for that night alone. A count of 5,000 on peak describes a very large conference.

9 A city-wide conference is a common industry term to indicate that it is so large that it uses many if not most of the hotel venues in the host city.
party contractor serving the association industry. Job titles included director (three of these) and meeting planner. It should be noted that one of the director positions was described as executive director of the association foundation. All roles were described as including direct meeting planning responsibility. No participant expressly mentioned support staff or supervising others.

Two participants of the four described their experience and training as on-the-job, all mentioned study for the CMP designation, one started as a hotel employee after earning a hotel / restaurant degree, and another started with a business degree and described a mentor as important to her learning in the meeting planning field. In addition, all four specifically mentioned MPI and two also mentioned two another membership groups which similarly provide training and education.

The conferences planned ranged from 350 to 8,000 attendees, the number of programs each year by participant was not consistently mentioned by participant. The most complex program had over 200 education sessions and around 350 exhibitors. The programs on which this group worked included conferences, annual meetings, awards programs, symposia, lobby days, seminars, webinars, fundraising events, and live and silent auctions, in addition to or as part of their conferences.

**Focus group G.** Focus Group G was scheduled and took place on August 5, 2011, with six participants, with three no-shows for a total of three discussants on the call, all female. One of the participants who did not attend reported that a major client, whose meeting with her had ended, asked for more time and as a major client, could not be turned down even though the request was last-minute and conflicted with the focus group session. Another scheduled participant was in an airport with travel delays and no internet access, and a rescheduled flight that prohibited telephone participation. This person was subsequently rescheduled into Focus Group H. The other missing participant did not respond to a follow up request for information.
Participants were given the pseudonyms Gail, Gilda, and Ginny. Years in current position ranged from four-and-a-half to 13 and averaged seven years. Years in the industry ranged from 15 to 30 with an average of 27.5. Cumulative years at the current position was 14.5 and cumulative years in the industry was 70. Two participants worked for different types of associations, one state and one city, and one worked for a third party contractor serving the association industry. Job titles included manager, director and president. All described their roles to include full service meeting planning with one participant noting that her organization delegates content responsibility to other staff.

Two participants described their early training as working in corporate meeting planning including catering, a horse track, and a major corporate entity. Another began work in this field at a convention and visitor’s bureau and then as an air agent, issuing tickets. When asked how they got their meeting planning know-how, Gilda first laughed and then wisecracked, “[In] the first 15 years before CMP and CMM, [I learned from the] school of hard knocks and mentoring.” Ginny said she “Fell into it, actually. Back then [it] was not a career path that you chose like you can now.” All mentioned study for the CMP designation, and also specifically mentioned MPI as part of their learning pathway.

The conferences planned ranged from 225 to 1,000 attendees, the number of programs each year by participant was not mentioned. The programs on which this group worked included conferences with plenary and breakouts, exhibit halls, some committee meetings, VIP lounge, guest programs, tours, networking, and a silent and live auction to benefit a charity.

Focus group H. The eighth and final Focus Group, Focus Group H was scheduled and took place on August 24, 2011, with seven participants, with one dropping out for a total of six discussants on the call, four female and two male. Originally scheduled for just six, the participant with travel delays who missed Focus Group G offered to participate in this one and was scheduled as the seventh.
Participants were given the pseudonyms Hannah, Heather, Halie, Heidi, Hank, and Harvey. Years in current position ranged from one to 25 and averaged nine years. Years in the industry ranged from eight to 33 with an average of 23.3. Cumulative years at the current position was 56 and cumulative years in the industry was 140. Three participants worked for different types of associations, one international, one state and one city, two worked for third party contractors serving the association industry, and one worked for a university research project that served an international audience. Job titles included manager (three of these), senior vice president, CEO and “Consultant, Educator, Independent Planner.” Their roles ranged from “a team of one” (Halie) doing not only full service meeting planning, but website design and maintenance as well as fundraising, to full service, independent meeting planning serving all the needs of individual clients, to college instructor in the hospitality industry while also working as an independent planner for multiple clients, to overseeing a team of as many as 23 direct-report staff.

Five of six participants described their experience and training as on-the-job, and all mentioned study for the CMP designation. One started as a college student as chair of a lyceum program, one at a university, one at a technology firm, and one started out at a popular magazine. Two specifically mentioned MPI and also mentioned three other membership groups which similarly provide training and education.

The conferences planned ranged from 225 to 23,000 attendees, one of them 10 days long with 6,000 rooms needed on the peak night. The programs on which this group worked included a live downtown parade in the host city, special events, golf, receptions, symposia, exhibit halls ranging from 50 to 100 booths, education programs, and simultaneous translation into as many as 10 languages.

Summary. A total of 40 participants participated in eight, one-hour, online focus groups in this study. Please refer to Table 11: Focus Group Participant Summary for a
snapshot of anticipated and actual focus group participants and their experience as previously described by individual focus group.

Table 11: Focus Group Participant Summary

<table>
<thead>
<tr>
<th>Group</th>
<th>Anticipated Participants</th>
<th>Actual Participants</th>
<th>Range at Current Position</th>
<th>Cumulative Years at Current Position</th>
<th>Range of Cumulative Experience</th>
<th>Cumulative Years' Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>5</td>
<td>4</td>
<td>5 to 22</td>
<td>50</td>
<td>17 to 25</td>
<td>82</td>
</tr>
<tr>
<td>B</td>
<td>6</td>
<td>5</td>
<td>3 to 20</td>
<td>55</td>
<td>7 to 24</td>
<td>87</td>
</tr>
<tr>
<td>C</td>
<td>6</td>
<td>6</td>
<td>1 to 4</td>
<td>11.5</td>
<td>9 to 25</td>
<td>96</td>
</tr>
<tr>
<td>D</td>
<td>6</td>
<td>6</td>
<td>1 to 12.5</td>
<td>25</td>
<td>4 to 21</td>
<td>92</td>
</tr>
<tr>
<td>E</td>
<td>6</td>
<td>6</td>
<td>3 to 25</td>
<td>49</td>
<td>9 to 25</td>
<td>83</td>
</tr>
<tr>
<td>F</td>
<td>5</td>
<td>4</td>
<td>1 to 11</td>
<td>20</td>
<td>5 to 29</td>
<td>84</td>
</tr>
<tr>
<td>G</td>
<td>6</td>
<td>3</td>
<td>4.5 to 13</td>
<td>27.5</td>
<td>15 to 30</td>
<td>70</td>
</tr>
<tr>
<td>H</td>
<td>7</td>
<td>6</td>
<td>1 to 25</td>
<td>56</td>
<td>8 to 23</td>
<td>140</td>
</tr>
<tr>
<td>Average</td>
<td>5.9</td>
<td>5.0</td>
<td>1 to 25</td>
<td>7.4</td>
<td>4 to 30</td>
<td>18.4</td>
</tr>
</tbody>
</table>

As summarized in Table 11: Focus Group Participant Summary, eight focus groups were named by alphabetical letter, A through H. Participants were issued pseudonyms so that all participants from Focus Group A had pseudonyms starting with letter A, Focus Group B, names starting with B and so on. The original plan was to have five participants in each focus group. However when the first group scheduled with five had one drop out, it suggested a revision to schedule with six. Five of the next seven groups were scheduled with six, one scheduled with only five, and one scheduled with seven. An average of 5.9 participants were scheduled over the eight groups for a total of 47 scheduled. Focus groups were attended by a range of three to six participants. There was one drop out from Focus Groups A, B, and F, and three drop outs alone in Focus Group G. There were 40 total focus group subjects who actually participated for an average of five in each group overall.

Participants ranged from one year to 25 years’ tenure at their current position for a total of 294 years of experience and an average of over seven years at the current position overall. Cumulative years in the industry ranged from four to 30 for a total of 735 total years of experience represented among the 40 subjects. Total years’ experience
among participants averaged 18.4. As mentioned earlier, all participants held either the CMP and/or the CMM certification.

Another way to describe the participants is by the type of organization for which they worked. Table 12: Participants by Organization Type, depicts a classification by organization.

Table 12: Participants by Organization Type

<table>
<thead>
<tr>
<th>Associations</th>
<th>International</th>
<th>National</th>
<th>Regional</th>
<th>State</th>
<th>City</th>
<th>Meeting Planning Company</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3</td>
<td>6</td>
<td>1</td>
<td>11</td>
<td>3</td>
<td>14</td>
<td>2</td>
</tr>
</tbody>
</table>

A total of 24 participants worked for associations varying by international, national, regional, state and city based on the population of members served. The majority worked for state associations. An additional 14 owned their own companies or worked for independent meeting planning companies which are often termed, *third party meeting planners*. This industry jargon means that they are contractors, and in this case, contractors in the association sector rather than in the corporate sector, although some self-described as serving both types of clients. Two participants did not fit any of these categories. One worked for a university and the other had almost all of her experience in associations, but recently moved to a corporate setting; she participated from her association experience.

Another way of describing the participant group is by job title. See Table 13: Job Title Descriptors. Job titles varied widely. There were 18 who listed their job title as either planner, manager, or specialist, 12 who had the word director in their job title and 10 who were either vice presidents, presidents, owners or self-described an owning or being the CEO of their own company. While this seems to describe a hierarchy of positions, it is important to note that one participant who had a title of Manager, reported
that she had 23 direct reports, four of whom were directors. It is an interesting observation that titles varied and do not automatically imply level among this group of participants.

Table 13: Job Title Descriptors

<table>
<thead>
<tr>
<th>Planner / Manager / Specialist</th>
<th>Director</th>
<th>VP, Owner, Independent Planner</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>12</td>
<td>10</td>
</tr>
</tbody>
</table>

Collecting and Managing the Data

The semantic differential survey. Two types of data were collected. The first was the semantic differential survey, and the primary purpose of that instrument was to encourage strategic rather than logistical thinking by leading the focus group participant through a series of opposing statements and forcing a choice that described their experience. The survey was a simple Microsoft Word document with one statement on one side of the page and a rather opposite statement on the other side of the page, separated by a continuum of seven options between them in which the participant put a mark to signify where, on that continuum between the two extremes best described their organization or experience. The items on the survey were based on the literature. Appendix C: Semantic Differential, depicts not only the survey, but indicates where it was related to the literature.

Participants each received the survey as an email attachment about three working days prior to the scheduled focus group and were asked to return it before the focus group started. They scored their position on each item by placing a mark in the category from one to seven that best described their position between the two dichotomies, saved the document and returned it as an email attachment. Thus, a score of four could be interpreted as a null score since it was exactly between the two
statements. All were returned except one participant in the very last of the eight focus groups. Thus, 39 semantic differential surveys were collected from the 40 total focus group participants.

When the surveys were returned by email attachment, they were acknowledged by the researcher by return email. Each survey was then opened and edited by inserting a header note with the subject’s name, and saved to the electronic folder for that scheduled focus group. It was also printed and the data keyed into a Microsoft Excel spreadsheet with a separate worksheet for each set of focus group participants individually and then a final worksheet with them collectively. Hard copies of each survey were placed in a notebook for reference if needed.

Once the data were entered, the spreadsheet functions of Mean, Median, Mode, Minimum, and Maximum were inserted and calculated. On such a small sample, the statistical analysis can only suggest similarities and differences, the most interesting of which are the largest differences from the mean. Specific results appear under the Findings section of this chapter.

**Focus group discussions.** The researcher and transcriptionist logged on 15 to 20 minutes prior to the schedule start time for each focus group to both test equipment as well as share the first names of the participants to enable the transcriptionist to take more accurate notes. As participants logged on, the transcriptionist could see who was speaking as their login name appeared on the GoToMeeting menu whenever their voice activated their microphone, or for telephone users, said “telephone.”

The focus group discussions were scheduled to be one hour long and participants were requested to log on 10 minutes prior to the actual start time in order to test equipment and provide a chance to solve any technical problems. As people logged on participants generally had a light discussion about weather or similar innocuous topic.
Once the time to start arrived, the researcher reminded participants that the discussion would be recorded and double checked that there were no objections to this. The recording was then begun and continued uninterrupted during each focus group, without incident. The transcriptionist stayed muted through almost all discussions except when asked to introduce herself in the beginning of each focus group, or when she rarely had a question or we had one of her. For instance, at one point she reminded the researcher to state the item under discussion rather than assume she could see it on the screen as it was too difficult to see who was speaking on the GoToMeeting screen, type verbatim notes, and watch a second monitor to catch the subject listed. On one other occasion, the group lost the meaning of a point made, and we asked her to find the reference, read it back and were able to get the originator of the thought to explain it more fully. The transcriptionist, though a meeting planner herself, did not participate in the discussions other than to introduce herself, as mentioned above.

Table 14: Focus Group Time Log

<table>
<thead>
<tr>
<th>Focus Group</th>
<th>Participant Recording</th>
<th>Total Recording</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>64.55</td>
<td>70.06</td>
</tr>
<tr>
<td>B</td>
<td>59.52</td>
<td>63.43</td>
</tr>
<tr>
<td>C</td>
<td>64.16</td>
<td>69.44</td>
</tr>
<tr>
<td>D</td>
<td>56.26</td>
<td>62.39</td>
</tr>
<tr>
<td>E</td>
<td>58.27</td>
<td>63.09</td>
</tr>
<tr>
<td>F</td>
<td>60.00</td>
<td>62.26</td>
</tr>
<tr>
<td>G</td>
<td>61.09</td>
<td>64.32</td>
</tr>
<tr>
<td>H</td>
<td>60.00</td>
<td>65.03</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>60.48</strong></td>
<td><strong>65.00</strong></td>
</tr>
</tbody>
</table>

Focus Groups were quite well held to the one hour time limit. See Table 14: Focus Group Time Log. Noting time in minutes and fractions thereof, three groups exceeded 60 minutes by a few minutes and three groups were slightly less than 60 minutes. However the start times for the recordings varied a little bit depending on when
all, or the majority of participants were successfully logged on. The average recorded
time with participants was 60.48 minutes.

For each focus group, the transcriptionist stayed on the GoToMeeting with the
researcher immediately following the close of the focus group with participants to briefly
discuss the experience, sharing impressions as well as technical issues faced and
handled, and suggestions for improvement. Scheduling of the next group or groups was
also discussed, but not recorded.

A chat log was created automatically by GoToMeeting if the chat function was
utilized. In all, it was utilized five times for Focus Groups A, B, C, E, and H. In each of
these cases it was used very little and primarily to question a technical issue like, “Can
you hear me typing?” from the transcriptionist, or trying to solve technical issues, or a
participant noting a need to leave the call exactly at the hour’s end. On two occasions
the transcriptionist tried to alert the researcher to call on a quiet participant, but as the
transcriptionist was challenged to do multiple functions, the researcher was similarly
challenged and did not see the chat note until the call had ended.

During the focus group, the researcher was working from two computer monitors,
one of which was shared with participants and the transcriptionist, and one which was
not. Initially, the shared screen portrayed the Microsoft Power Point slide show
supporting the discussion questions. See the Power Point slides in Appendix D:
PowerPoint. On the other monitor, the researcher was utilizing a pre-prepared Microsoft
Excel Spreadsheet into which she was documenting keywords describing the meeting
planning elements identified by the participants as they mentioned them.

At the appointed time in the discussion when the questions soliciting elements
was concluded, participants were shown the spreadsheet on the GoToMeeting shared
monitor. Participants were asked to review the elements to make any changes,
corrections, or additions to the list. Very few changes were made. A hidden row on the spreadsheet was then revealed with a rating scale as follows:

1 = Most Important,
2 = Moderately Important, and
3 = Least Important.

Participants were asked to rate each element they had listed, understanding that they were asked only to provide important elements to begin with. GoToMeeting not only recorded the discussion, but also recorded a video of what was showing on the screen at the time of the discussion. Thus, the researcher could reference what was being discussed or scored as it actually happened during the discussion. Typing and movement of items is visible in the record and can be access from a computer video player.

**Findings: Semantic Differential**

**Data summary.** The Semantic Differential Survey was distributed to every focus group participant about three working days prior to the focus group discussion. The primary purpose of the survey was to focus the discussion and stimulate the participant's thinking prior to the actual focus group. Of the forty participants, 39 returned the survey. The results are presented in Table 15: Semantic Differential Data, and indicate where the mean score differed from the neutral score of four. The table has been sorted so that the scores that differed the most from four are listed in descending order. With a range from one to seven, the greatest possible difference would be three. Only a few scores are notable.

Three items differed from the mean by 2 or more points.

- Avoiding mistakes, evaluating programs, and understanding core members were survey items among which participants were most alike.
Avoiding mistakes was clearly more important than not worrying about making mistakes. The most frequent score was one on a one-to-seven scale. No one scored this a six or seven.

Evaluating programs was similarly skewed toward always evaluating over not evaluating, again with the most frequent score that of a one, with no one scoring it a five to seven on the seven-point scale (not evaluating).

Likewise, understanding core members was reported most often a one, with no one scoring it a six or seven, thus indicating that respondents likely understood their membership and perhaps by extrapolation, had insights into their target audience, which surfaces later in the elements as does evaluation.

There were 10 items that had a difference from the mean of 1.0 to 1.9.

- The most interesting of these was a tendency toward some people’s opinion’s matter more in decision-making where the difference from the mean is the next highest and the mean is skewed towards some people’s opinions matter more.

The remaining 23 items had mean scores less than one point from the mean. Two of these were almost equal with the mean: Program planning processes stable vs. continually evolving processes, and (2) highly engaged vs. not very involved Boards of Directors. While important to recognize these as outliers in the survey, there seems to be little relation of the scoring of these elements to the emergence of elements during the discussions. Most scores were the full range from one to seven and this perhaps suggests that CPE among associations may be widely varied in practice.

Yet, of particular interest to the researcher, a student of adult and continuing education, is the item regarding participants’ training in adult education, on which the group had a mean score only 0.21 from a neutral position but ranged from one to seven among all scores on this item. This suggests that a focus on adult and continuing
education theory applied to practice widely varied among participants in this study, and some had little or no training. The mean score is skewed a bit more toward having less rather more training. However, a bit more hopeful is the item asked a bit earlier in the survey that has to do with practice that uses formats that engage adult learners where the mean score is .37 from the neutral score of four, but skewed more toward application over non-application.

**Discussion.** The primary purpose of the semantic differential survey was used to help the participants focus their thinking prior to the actual discussion. For the first focus group, Arden had not yet returned it by the due date, was prompted by email and did complete and return it noting that she was glad to have done so because it focused her thinking. Except as noted above, very few survey items had notable results. It is important to note, however, which survey items subsequently emerged from the discussions into elements (elements are reported later in this chapter). The following items in the survey emerged in whole or part as planning elements and they are listed in order as they appeared in the survey. They are highlighted in Table 15: Semantic Differential Data, by boldface type and include evaluation, needs assessment, technology, objectives, mission, members, profit (a reference that could be construed as related to budget), and adult education. One survey item was related to overall staff training in adult and continuing education and *Training* of the respondent is also highlighted. While there seems to be no way to figure out, from this data, what this may mean to the development of the results of this research, it is at least skewed toward more rather than less education and training of staff in the area of adult education.
Table 15: Semantic Differential Data

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
<th>Mean Difference from 4</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoiding mistakes is important when making program decisions</td>
<td>1.56</td>
<td>2.44</td>
<td></td>
</tr>
<tr>
<td>We always <strong>evaluate</strong> our programs</td>
<td>1.90</td>
<td>2.10</td>
<td></td>
</tr>
<tr>
<td>I have a clear understanding of who are core <strong>members</strong> are</td>
<td>1.97</td>
<td>2.03</td>
<td></td>
</tr>
<tr>
<td>Everyone is equal when making decisions</td>
<td>5.74</td>
<td>1.74</td>
<td></td>
</tr>
<tr>
<td>We follow an articulated program planning process</td>
<td>2.54</td>
<td>1.46</td>
<td></td>
</tr>
<tr>
<td>Our CPE program has a customer or member service-type culture</td>
<td>2.61</td>
<td>1.39</td>
<td></td>
</tr>
<tr>
<td>A deliberate effort is made to meet the concerns of the association board</td>
<td>2.62</td>
<td>1.38</td>
<td></td>
</tr>
<tr>
<td><strong>We assess our members’ needs</strong> on a regular basis</td>
<td>2.79</td>
<td>1.21</td>
<td></td>
</tr>
<tr>
<td>A deliberate effort is made to meet the concerns of the association president</td>
<td>2.82</td>
<td>1.18</td>
<td></td>
</tr>
<tr>
<td>Dialogue and engagement describe our program decision-making</td>
<td>2.87</td>
<td>1.13</td>
<td></td>
</tr>
<tr>
<td>A deliberate effort is made to use innovative <strong>technology</strong></td>
<td>2.92</td>
<td>1.08</td>
<td></td>
</tr>
<tr>
<td>Program <strong>evaluations</strong> are fully mined and used for program improvement</td>
<td>2.95</td>
<td>1.05</td>
<td></td>
</tr>
<tr>
<td>Program decision-makers pay careful attention to clearly defining program <strong>objectives</strong></td>
<td>2.97</td>
<td>1.03</td>
<td></td>
</tr>
</tbody>
</table>

- Avoiding mistakes is not a major concern
- We seldom or never evaluate our programs
- I have little understanding of who make up the core of our membership
- Some people’s opinions matter more
- You would not describe our CPE program as member-service oriented
- No deliberate effort made to meet concerns of association board
- We rarely ask our members about their educational needs
- No deliberate effort made to meet concerns of the association president
- Decision-making tends to be made by one person
- No deliberate effort to use innovative technology
- We evaluate but do not use the data for program improvement effectively
- Program objectives are not well defined
<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoiding embarrassment is important when making program decisions</td>
<td>3.21</td>
<td>0.79</td>
<td>Avoiding embarrassment is not a major concern</td>
</tr>
<tr>
<td>I had <strong>training</strong> or thorough orientation to my role in CPE program planning in this association</td>
<td>4.76</td>
<td>0.76</td>
<td>I had little or no formal <strong>training</strong> for my role in CPE program planning in this association</td>
</tr>
<tr>
<td>Program decisions are <strong>mission</strong> driven and if the program does not conform to mission, we don’t do it</td>
<td>3.26</td>
<td>0.74</td>
<td><strong>Mission</strong> is not a decision driver in our CPE program</td>
</tr>
<tr>
<td>Our association routinely collaborates and partners with other associations</td>
<td>3.26</td>
<td>0.74</td>
<td>Our association very seldom collaborates or partners.</td>
</tr>
<tr>
<td>Our association CEO is highly engaged in our program planning</td>
<td>3.26</td>
<td>0.74</td>
<td>Our association CEO is not very involved in our program planning</td>
</tr>
<tr>
<td>We agree on what a successful CPE program is</td>
<td>3.28</td>
<td>0.72</td>
<td>There is little agreement on what makes a successful program</td>
</tr>
<tr>
<td>Our planning process focuses on practical matters</td>
<td>3.31</td>
<td>0.69</td>
<td>Our planning process focuses on strategic matters</td>
</tr>
<tr>
<td>Avoiding conflict is important when making program decisions</td>
<td>3.36</td>
<td>0.64</td>
<td>Avoiding conflicts is not a major concern when making program decisions</td>
</tr>
<tr>
<td>Data-driven strategies drive our CPE program</td>
<td>3.41</td>
<td>0.59</td>
<td>We seldom use data to drive our program decision-making</td>
</tr>
<tr>
<td>We have a clear definition of a successful CPE program</td>
<td>3.41</td>
<td>0.59</td>
<td>We do not have a clear definition of a successful program</td>
</tr>
<tr>
<td>Decisions serve all <strong>members</strong></td>
<td>3.42</td>
<td>0.58</td>
<td>Decisions serve some <strong>members</strong></td>
</tr>
<tr>
<td>Our program planning process is very open</td>
<td>3.47</td>
<td>0.53</td>
<td>Our program planning process is a closed system</td>
</tr>
<tr>
<td>Decisions based on making a <strong>profit</strong></td>
<td>3.55</td>
<td>0.45</td>
<td>Making a <strong>profit</strong> is NOT important when making program decisions</td>
</tr>
<tr>
<td>We carefully use data we collect on our members’ <strong>needs</strong></td>
<td>3.56</td>
<td>0.44</td>
<td>We have data but we don’t use it effectively</td>
</tr>
<tr>
<td>Decisions serve long-time <strong>members</strong></td>
<td>3.62</td>
<td>0.38</td>
<td>Decisions serve newer <strong>members</strong></td>
</tr>
<tr>
<td>Decisions serve the core <strong>members</strong></td>
<td>3.63</td>
<td>0.37</td>
<td>Decisions serve specific groups of <strong>members</strong></td>
</tr>
<tr>
<td>Statement</td>
<td>Mean</td>
<td>SD</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>------</td>
<td>-----</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Program decision-makers recommend varying formats to engage <strong>adult learners</strong></td>
<td>3.63</td>
<td>0.37</td>
<td>Program decision-makers spend little time thinking about how the program should be designed to get the best transfer of learning for adults</td>
</tr>
<tr>
<td>Program decisions are made in order to satisfy vocal members</td>
<td>3.79</td>
<td>0.21</td>
<td>Program decisions are not based on satisfying vocal members</td>
</tr>
<tr>
<td>Staff have formal training in <strong>adult education</strong></td>
<td>4.21</td>
<td>0.21</td>
<td>Staff have little or no formal training in <strong>adult education</strong></td>
</tr>
<tr>
<td>Decisions based on <strong>member</strong> ideas</td>
<td>4.13</td>
<td>0.13</td>
<td>Decisions based on <strong>staff</strong> ideas</td>
</tr>
<tr>
<td>Our program planning process involves many people</td>
<td>3.87</td>
<td>0.13</td>
<td>Our program planning involves a few people</td>
</tr>
<tr>
<td>Our program planning process is very stable and has not changed much from year to year</td>
<td>3.92</td>
<td>0.08</td>
<td>Our program planning process continually is evolving</td>
</tr>
<tr>
<td>Our association Board of Directors is highly engaged in our program planning</td>
<td>4.05</td>
<td>0.05</td>
<td>Our association Board of Directors is not very involved in our program planning</td>
</tr>
</tbody>
</table>
Questioning Route Questions: A Process to Identify Elements

Highlights. Before describing the step-by-step responses to the questions participants were requested to address, some overall impressions emerged from the leading the discussions as well as reading and re-reading transcripts. The association meeting planners in this study exhibited a commitment to excellence in their positions. Not one participant complained about his/her job or role, and many if not most were clearly happy in their positions and as meeting planners. Based on popular trade publications stories about the economy and its impacts on association budgets recently, it was surprising that budget was highlighted as a very serious problem for only one participant. Many discussed budget challenges as: working hard to get more for less money, cutting entertainment, moving from top shelf liquors to beer and wine only at networking events for instance, but only one expressed budget hardship. This lack of intense budget stress was unexpected.

One important thing to remember about association meeting planning is that this is not a nine-to-five type job. Just consider the complexity of Hannah’s work, the participant who was responsible for planning a city-wide, five-day conference for 15,000, with 6,000 sleeping rooms peak night, which included educational sessions, an exhibit hall, a parade down a major city street, and translated live into 10 different languages! These are big and complex projects.

One concern that threaded itself throughout the discussions addressed increasing rates of change across multiple elements. Another factor that was mentioned and perhaps provides insight for the reader of this study is that most of these respondents worked alone, and many were the only meeting planner for their organization. Even though they worked on overall association teams, the planning and execution of their meetings was their responsibility. Further, this means that learning about new things in the industry had to be self-initiated, as had much of their training in
the field of professional meeting planning overall. The most common answer to the question of, “How did you get your meeting planning know-how,” was on-the-job and this answer was very often accompanied by laughter and a story of how they fell into the work through a need at their current company, or by a mentor or supervisor suggesting that they would be good at this and assigning them to do a particular project. The on-the-job learning of these respondents may be particular to this demographic group as they had quite long tenure in the field of meeting planning. Newer planners now have far greater education and training resources through meeting planning associations, non-credit and for-credit programs at universities and colleges not available when these participants first entered the field. The CMP, the designation that was used as part of the criteria to be a participant in this study was not even available when some of these participants started their work as meeting planners.

Although these observations come from the discussions, it must be noted that the researcher is also a professional meeting planner holding a CMM designation and experience in directing over 500 association type conferences over more than 20 years. Some of these overall interpretations may be influenced both by experience as well as long interest and immersion in this field. However, this experience also makes the researcher an astute listener for nuance particular to this field that someone from outside of the field may not recognize.

The most important overall finding that was hoped for and can now be reported as what actually took place, is that the elements these participants reported that they use seemed to be truly the ones that they practice (or wish that they had time to practice). The following are the results of the questioning route discussions, by question. These very experienced practitioners, credentialed in the field, talked freely and with passion about their work.
Question 1: Tell us about yourself. The exact question was, “Tell us who you are, briefly describe your role in planning one or more conferences for your association, and name one thing you like most about working in conferences.” The researcher had previously collected job title, organization, years in current position, years in the industry, role, experience and conferences planned and these findings were reported earlier in this document.

The purpose of this question, then, was to introduce the discussants to one another and understand the background from which the discussant was speaking. The most interesting part of the introductions was the naming of the one thing that each participant liked most about working in conferences. Remember that this participant group had many years in this industry, 19 or almost half of them with 20 or more years. They were very clear about what they personally liked, with many not limiting themselves to one thing.

One common theme included a project coming to fruition, long planning turning out successfully, never getting bored, and no two days alike. Hank described it this way, “What I like best about it…is dealing with people and crisis management on site where you have to make decisions spur of the moment. I love that.” And also as Harvey indicates, “Getting the blues after the end of the meeting. I call it PMB, post meeting blues.” To someone who is not familiar with the work of meeting planners, projects are intense and reach a day when all elements must come together successfully, or if problems arise, those problems must be handled quickly and effectively. It is this to which Hank is referring.

Another theme could be described as having a business perspective and included successful budgets, negotiating, contracting, obtaining good value for the client, and providing cost-effective solutions. As might be expected from participants who work
in associations serving members, another theme emerged around liking to work with people, volunteers, members, and special groups of members.

Conferences can be described as projects, and some liked characteristics of projects in that “no two days are ever alike” [Gail], always changing, “never get bored” (Darcy), and we “never do the same thing twice. I get to use my creativity as I plan the meetings” (Dana), and that “it’s a challenge to make them [the conferences] different each time so our people don’t get bored with going to them” (Ginny). Some mentioned that change is what they like highlighting technology in particular. Variety is another word that resonated with participants, every day a chance to learn something new. All of these themes threaded through participants descriptions, with one outlier. One participant mentioned that it was the strategic thinking behind the projects that was the most gratifying.

Question 2: Describe your conferences. The exact question was, “Can you briefly describe the conference(s) you plan each year?” The researcher had previously collected job title, organization, years in current position, years in the industry, role, experience and conferences planned; this is reported earlier in this chapter. There were 40 descriptions of unique conferences among the 40 attendees. Additionally there was wide variety within each individual focus group. Some participants worked on only one or two conferences each year, some worked on many, each with a different size and purpose within their own organization. Some more extensive descriptions follow as examples. These are grouped by job title merely for convenience.

From the Planner, Manager, Specialist job title group Andrea explains her conferences, followed by Elsa. They say:

-- Currently I’m the sole meeting planner for a 50,000 member state association. Within our association there are nine different departments and two divisions. Different departments plan different meetings and
educational courses and I work with each of these departments throughout the planning process to implementation of each program. Example: everything from strategic meetings for directors and executive officers, to spokesperson training, [and] educational programs which are one and two day; presently [there are] about 120-130 on next year’s calendar already. Two statewide five- to six-day business meetings. Two three-day meetings for one division, two-day meeting for the other division. We also do a tri-state convention. I work with planners from other states to pull that off. Until two years ago, that had an attendance of about 11,000. With the economy, that’s dropped basically in half. But from planning through implementation those are each of the things I have my hands in right now.

-- I am an association planner for a golf association. Primarily my role is our annual tournament, 500 attendees over the course of 4 days. I also do committee and board meetings at the headquarters and assist in the annual convention, a 17,000 attendee, city-wide trade show and education conference.

From the group of Directors, here are two examples: First Doris explains, and then Faye. They say:

-- I work for a non-profit state association. I’ve been in the meeting planning industry since 1990 so, a little over 20 years. I’ve been with my current association for almost 13 years. We do two main conferences a year, one in the summer with about 900 and our annual averages about 3,000. [In] our summer [one] we have about six breakouts, concurrently every hour for two days with exhibits. Annual is on a larger scale with 15-20 concurrent breakouts for [a] two-and-a-half day period with exhibits;
this is where the business for our association is handled. We only have six employees so I am the meeting planning department. Logistics, contract negotiations, site tour, AV, transportation, speakers, food & beverage and all of the responsibilities that go along with that. And we do have an exhibits manager which I work closely with as well.

-- I answer this based on a 12-year length of service with a trade association. I’m in a third party planning company now with association, not-for-profit clients. I was there for 12 years in the trade association, hired for their annual convention and trade show which made the association operate in the black, the one month of the year we had it, and we used that money the other 11 months. [It had] 8,000 people, 350 exhibiting companies, [an] education platform, [and was a] three day event in Boston.

From the group of vice presidents, owners, or independent meeting planners, the following are two examples of the types of meetings they reported that they planned. First Elinor describes her role, followed by Charles. They say:

-- I run a third party planning company. We do everything from…we consider ourselves to be someone’s outsourced, in-house meeting management firm. We work from strategic vision, site selection, contracting, negotiations, compliance, through to facilities management, production elements, logistics, housing, special events, registration, marketing plans; we look at all the integrated pieces, manage the finances. To a large part I set the budget and am responsible for maintaining it. Making sure we have ROI at the end. There are a lot of things we focus on.
-- My primary role for my clients is assisting with their site selection, negotiating the contract with hotel, AV, food & beverage, and so on. My clients in terms of association are about half in the continuing medical education field and half political organization associations.

It is important to remember that only association meeting planners with a CMP or CMM or both, who worked on conferences of 250 persons or more were invited to participate in this research as subjects. While there were meeting professionals whose meetings were only for groups of 250, the majority were meeting professionals working on larger projects with substantially more than 250 participants. However, a conference for 250, if it includes extra events, committee meetings, education, a trade show and the like can be as complex as conferences that serve a much larger group of registrants.

**Question 3: Name planning elements.** The exact question was, "Planning a conference requires thinking about many things, let’s call them planning elements. I would like us to make a list of all the elements you consider or discuss, assuming your goal is to create the best continuing professional adult education conference possible."

This was the central and most important question of this questioning route. Elements were initially defined in response to this question, but other elements were eventually added to the final results from discussions around subsequent questions, described sequentially below. Since this research was interested in the total list for analysis, elements identified due to this question alone are not as important as the overall list developed over all the questions in the questioning route together. The list of total elements generated by group is documented, later in this chapter. See the section on Findings: Focus Groups Collectively Named 181 elements, which details elements by group.
Question 4: Prompts for other elements. The questioning route items that follow were primarily designed as prompts to help the group consider elements that they had not previously mentioned. The questions were:

(a) “Would you add any other elements if planning a new conference rather than an annual or repeat one?”
(b) “Sometimes there are planning elements that are especially challenging?”
(c) “Are there elements that you or your association you are considering adding?”
(d) “Likewise, are there any planning elements that you used to do that you no longer do?”

Initially meant to encourage participants to identify new elements that they had perhaps not considered in earlier discussion, the answer to these four questions provided some unexpected insights into changing practice and will be discussed question by question, illuminating patterns, and noting concepts with intensity of response. Elements identified in this section are also discussed in the overall list of elements and their ratings.

Question (a) asked about adding elements if planning a new conference but responses also included elements they had recently experienced. The most intense discussions were around the research needed to plan a new meeting, not only elements previously discussed such as budget, location, content, speakers, and the like, but also around what is new in the industry overall. As Andrea explained, “I tend to do a lot of research…not just program development, but also finding out what the professional associations are saying about things like contract negotiations, or difference processes [such as] registration, or different kinds of sponsorship programs.” Elinore added that she was interested in, “Staying on top of all the tools and changing technologies.” An
additional aspect of research concerned identifying potential competition and conflicts for space in the host city\textsuperscript{10}.

Across focus groups another theme emerged, that of making the conference unique. Daisy asked, “What would set this conference apart from others, making it new, and unique, more valuable,” or, as Elinor said, would make it “look different, feel different, and more stimulating.” Other comments included adding webinars for engagement, needs of international attendees, adding the right amount of networking opportunities, and concern over estimating a room block with no previous history on which to base the contract.

(b) Challenging items centered around common themes as well. One was money; another was engagement of varying groups. There was also considerable discussion around the need for contingency planning.

Budget had already been identified as a key element and was mentioned many times in response to this question. Economic impact, and the simple need to get people to register or “fill seats” are related to budget concerns. Fran said it most concisely, “I think all industries are feeling [challenged] with the tough economic climate, [with] budgets being cut for training and education; the major challenge is getting people to attend your conference.”

Another theme emerged around the notion of member engagement including the challenge of serving differing generations and varied audiences, keeping the program fresh, keeping exhibits relevant, and enhancing networking. Insight into the concept behind engagement was expressed by Gail, “Our members drive the way we go as consumers drive the way corporations react.” In the association arena, it is all about engaging the member, and keeping them engaged.

\textsuperscript{10} The example cited was booking their meeting not realizing that the Big 10 were also booked city-wide at the same time and had impact on airfare, housing, and other resources.
Crisis management and dealing with emergencies, bad weather, and so on will be referred to using the industry term, contingency planning. This was mentioned across the majority of individual focus groups with concern that it is not yet routine. Florence mentioned a blizzard, Fran had disruptive union issues in the host city, and Ben was most eloquent, “…we still haven’t gotten it since 9/11. We… need to understand the key elements of what could go wrong. Not necessarily a terrorist attack, but something like a wildfire, your keynote has gotten ill and can’t come.” The ratings of this element underscore this ambivalence with ratings of one, two, and three among the groups.

There were two other challenges mentioned, but each were only mentioned once. These were getting good speakers and working on visa issues for international attendees.

(c) Only two common themes emerged when asked what participants may be considering adding (or as they seemed to interpret the question, had recently added), and these themes are related to technology. Social media refers to facebook, LinkedIn, and other social media programs such as twitter, and the other was adding mobile applications, referring to having program agendas on smart phones instead of, or in addition to print. Ambivalence among participants was common and Barbara best expressed the ambivalence, “The other thing we’re considering adding is the whole social media using facebook, and twitter, which I haven’t quite figured out the value of it for meetings, but [I am] trying to be open minded.”

There were four other comments, but each was mentioned only once in the context of adding new elements. These were focusing on inviting special speakers [implying name-recognition speakers pertinent to the target audience], including charity/corporate social responsibility events, poster sessions, and back to technology, live streaming of keynotes.
(d) The list of things that were no longer being done merged into several categories: downgrading of exhibit halls, less printing, selecting less expensive venues and/or food and beverage, and eliminating technology that is no longer needed. Exhibit halls were either eliminated entirely, reduced in size, and one made a rule that tchotchkes\textsuperscript{11} would no longer be permitted.

Budget and perception of association budget spending were addressed in a variety of ways. These included elimination of formal banquets, sometimes transformed into shorter receptions, eliminating entertainment such as a major singer, and downgrading bars to only beer and wine. It also included selecting lower rated hotels and simply eliminating some social events. In the food & beverage arena, bottled water and hot tea were eliminated as cost saving measures as well.

There was much less printing of program brochures, programs for use onsite, handouts and signage. In many cases these things were still available but on the internet or in mobile applications for smart phones. Sometimes this was referred to as going green. Focus Group H provided an interesting insight by admitting that the organization may also be saving budget costs by not printing, but the cost may be being pushed to the attendee. What this meant in discussion is that though handouts were no longer printed, they were provided on the conference website. By providing them there, printing and the associated cost of paper and ink were essentially transferred to the attendee. Heidi referred to this as “A gift from a budget perspective, but from an environmental perspective, everyone needs to push toward greening their meetings.”

\textsuperscript{11} Tchotchkes typically refer to small, branded gifts customarily given away at exhibit halls. This practice borders on tradition so elimination of it, while it may seem a small change, really represents change in time-honored practice.
The other mentioned changes were the elimination of cyber cafés\textsuperscript{12} and concurrently, paying for group internet access at hotels. The need for these things is being eliminated as more and more attendees have smart phones and thus their own internet access.

Overall, budget and spending perceptions and engagement and networking were common themes throughout these four probing questions. Another sub-theme was enhancing learning and networking: time is valuable. Betty expressed it as, “… we’ve noticed that there’s a stronger need for shorter, more frequent, more condensed educational sessions and events. People are more likely to come to a two-hour or half-day to get information, rather than a full-day, two-day, or two-and-a-half-day [face-to-face meeting]; their time is of the essence. [They] want it quick and cost-effective. So we are looking at shorter, more condensed education and [making it] just [as] valuable and cost-effective using technology.”

Definite patterns emerged from this set of four questions as the comments tended to group into themes across the eight focus groups. The elements that were mentioned in these prompting questions were added to each group’s total element list and addressed in the coding and processing of all elements. However, in and of themselves, these questions had the unexpected result that they shed light on changing practice. However, since this was the last question asking the group to identify elements, the next step was to ask for verification.

**Question 5: Verify, add, change the list created.** The exact item was, “I have been taking notes on the elements you have listed. I am going to show them to you on the screen now and I would like you to take a minute to look these over. Please let me know if you would like to make any changes or additions to the list.” Remember that the

\textsuperscript{12} Computer stations, usually arranged in a group, providing attendees access to internet on a first come, first served basis.
researcher was capturing the elements each group identified in a spreadsheet as the group actually identified them. This list or spreadsheet, originated on the second computer screen not yet shared with participants, was then literally shown to all participants on the GoToMeeting shared screen. Each group was given adequate time to review the list and only in two instances were small wording changes made. However, the group was free to create a heading and move items related to it under that heading and this was frequently utilized in the next step.

**Question 6: Rate the importance of the elements.** The exact question was, “Can we organize these into three categories? Most important, moderately important, or least important?” This proved to be somewhat confusing to the group as they had just made their list of most important elements. By the seventh group, the transcriptionist suggested that this explanation provided to Focus Group G by the researcher was the clearest, “We know that everything here is really important. But now I’d like to know how important each of these really important things is by rating them 1 to 3. It’s possible to say ‘this really is the same as that’ and move items. I’m looking for consensus as much as possible though sometimes we won’t come to consensus.” Each group then addressed each element they had identified, discussed it further if necessary, and provided a rating. Sometimes the group could not come to consensus, so the researcher added another rating column for those disputed ratings and the conversation was captured in the transcript. Comments disagreeing on ratings were generally caused by the fact that for the someone’s organization, that particular element did not apply. One example is that some organizations were focused on the provision of CEUs to their attendees, and some organizations’ members did not need CEUs at all, thus provoking a rating of both one and three.

Overall, most element ratings were decided by consensus, or by one focus group member suggesting a rating that was not contested. The researcher would check by
prompting if this was not clear. The transcript noted things like “all agree” or would note
the disagreement if there was such. In a number of cases, single elements were moved
to a sub-position under another element. For instance, Focus Group D moved an original
element of “where to spend money” into the obvious category of “budget.” A section of
the transcript is given as an example.

<table>
<thead>
<tr>
<th>Line 345</th>
<th>Moderator: <strong>Where to spend the money</strong> [element]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 346</td>
<td>Doris: That’s all under budget</td>
</tr>
<tr>
<td>Line 347</td>
<td>Danielle and Daisy both agree</td>
</tr>
<tr>
<td>Line 348</td>
<td>Moderator: moves</td>
</tr>
</tbody>
</table>

It is clearer to address ratings by element later in this chapter when the overall element
categories had emerged as ratings were useful in determining which elements were
most important. This section only addressed the rating process, rather than the ratings
themselves.

**Question 7: Anything left out?** The exact question was, “Thinking about our
discussion today, is there anything that was left out that you would like to add?” For
three of the eight groups, time had run out before this question could be asked.
However, in each instance, participants were invited verbally as well as in a subsequent
e-mail, to submit by e-mail any elements, thoughts or comments that had not been
discussed. Thus, all participants had the opportunity to respond to this question.

A number of responses were received and the elements identified were included
in the analysis equally with elements identified during the live discussion. Further, they
were added to the spreadsheet and annotated by font color to indicate their source was
a subsequent response. Remember that these elements may have been identified in
other groups, but had not been so identified in the respondent’s group.

Elements that were added include the following: green initiatives, program
development, logistics, presenter management, target audience, vendor partners as
collaborators, evaluation post event, research on new ideas, economy and budget
positioned as limiting factors, new ideas knocked down by ‘good ol’ boys’ mentality, change, research needs for one’s self, and generational challenges on boards of directors. An interesting observation generated during these discussions was in Focus Group D where it was observed that in the rating of elements, they had only identified ones and twos, “Everything we do is very important and it all needs to be done at the same time,” explained (Doris).

**Question 8: Most important.** The exact question was, “Of all the things that we talked about today, what do you believe was the most important thing that was said about planning the most successful CPE conference possible?” Of the eight focus groups, we ran out of time during the call to address this question for four of the groups. However, the question was asked verbally and participants were invited to submit answers by email, and they were reminded of this in email correspondence from the researcher as well. Every group had participants respond for a total of 29 participants responding (some contributed two topics) or almost a 75% response rate. Most of the results fell into three groups and then there were a number of items that only were mentioned by one person each. Eleven said goals & objectives, nine identified the target audience, their needs and creating value for them, three people said budget, and two people identified change itself as the most important element. Single elements named included content and delivery, contingency, generational challenges, adhering to mission of the organization, and technology. There was one other interesting comment that focused on the difference between association and corporate meeting planning. Highlighting her most important category, marketing, Faye said, “Corporate planners don’t have to worry about the marketing and the value because that is an employment dictated thing. It’s more seamless and works nicer…. Time away from work, lodging, registration, all this stuff they [association attendees] have to pay for.” The responses to
this question were incorporated and support the subsequent compilation of all elements into categories in the overall analysis.

**Findings: Focus Groups Collectively Named 181 Elements**

In this section, elements named by individual focus groups are delineated. The words used by participants are reported here.

**Focus group A.** This group discussion yielded 21 planning elements which were then rated into the following categories: (1) most important, (2) moderately important, and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. Elements with secondary ratings are noted.

(1) Agreed Most Important (9)

- Budget
- Environment for adult learning
- Goals and objectives of the program
- Keeping people engaged
- Marketing
- Needs analysis

(1 & 2) There was disagreement as to whether the following should be a 1 or 2 (3)

- Audience: What they want and delivering to them what they need
- Program development
- Venue

(2) Agreed Moderately Important (10)

- Attendance (generating it)
- Food & beverage
- Networking (breaks, exhibits)
- Obtaining handout materials from speakers
• Outsourcing, requests for proposals to vendors
• Registration management
• Researching meeting planning

(2 & 1) There was disagreement as to whether the following should be a 2 or a 1 (2)
• Getting good speakers, the right speakers
• Staffing on site

(2 & 3) There was disagreement as to whether the following should be a 2 or a 3 (1)
• Networking with other meeting planners

(3) Agreed Least Important (1)
• Social Media

Focus Group A concluded with a recording 1:04:59 long, with the recording and transcript continuing to 1:09:57 which included the discussion between the researcher and the transcriptionist. Observations in this extended conversation included that it seemed to be a more senior group of participants compared to the pilot participants, and that they were more strategic in their discussions, rather than devolving into logistics. The transcriptionist wondered if this was not only because it was a more experienced group, but perhaps it was because they were supervisors as well. We reviewed our experience in hearing the keyboarding from either one of us who were typing, but agreed that it was minor. We were not able to get the secondary recording device to work, but it seemed that people were speaking slowly and the transcriptionist felt she was capturing an accurate representation. Upon review of the transcript with the recording, this was indeed true.

Focus group B. This group discussion yielded 23 planning elements which were then rated into the following categories: (1) most important, (2) moderately important,
and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. There were no secondary ratings

(1) Agreed Most Important (8)

- Budget
- Education and content delivery
- Goals and objectives
- How to deliver: Regional, national, online
- Marketing
- Needs assessment used to create needed program
- Relevance to members’ business
- Target audience

(2) Agreed Moderately Important (12)

- Audio visual
- Crisis management planning
- Engaging the younger audience
- Evaluation
- Integrating technology for cost management
- Location
- Measurement and benchmarking
- Member’s time, providing something that they can only get from us
- Room set
- Strategic meetings management
- Technology as an accessory
- Venue
(3) Agreed Least Important (3)

- Keeping paper to a minimum: Green
- Staff: Continue to add programs but no additional staff, more strategic and efficient staff, use of technology to increase efficiency
- Trends in the industry

Focus group C. This group discussion yielded 14 planning elements which were then rated into the following categories: (1) most important, (2) moderately important, and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. During the initial discussion, participants listed many elements which were, in subsequent and continuing discussion, combined. Those sub-parts are also detailed below. Elements with secondary ratings are noted.

(1) Agreed Most Important (7)

- Attendance building (myriad sub parts)
  - Attractive destination
  - Who are you trying to serve? (segments)
  - Who is coming? (family, spouse too)
  - Generationally differing groups attending
  - How intended audience can justify attending, paying for, being out of office
  - Getting attendees in challenging economic times

- Good financial plan (budget), costs rising

- Good clear objectives
  - What do attendees want to learn?
  - What are program financial goals?
  - How to measure results?
Action plan and timeline, as guide and measurement

Why are we holding this meeting? We have always had it

Overall plan – a single or continuing event

- Solid marketing plan
  - Arming potential attendees with ways to persuade their [travel] decision makers
  - Social media
    - After conference event(s) to continue engagement
    - Audience – identifying target market

- Putting the program together
  - Timing of the event, now shorter events
    - Entertainment changes

(1 & 2) There was disagreement as to whether the following should be a 1 or 2 (1)

- History over past two years, trends in the industry

(1 & 3) There was disagreement as to whether the following should be a 1 or 3 (1)

- Continuing education credit

(2) Agreed Moderately Important (5)

- Networking and generation gaps
- Return on investment
- Getting good speakers
- New technologies
- Overall value of venue
  - Changing day patterns to get better rate\(^{13}\)

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\(^{13}\) For instance, changing from a Monday to Wednesday pattern to a Friday through Sunday pattern. This refers to negotiating better sleeping room and meeting space rates based on hotel flexibility in pricing.
Changing to hotels with a lower star\textsuperscript{14} rating

(3) Agreed Least Important (2)

- Interactivity during the meeting
- Scheduling
  - Continue to include banquets or not
  - Social events changing

**Focus group D.** This group discussion yielded 13 planning elements which were then rated into the following categories: (1) most important and (2) moderately important. Elements are listed according to rating, and then alphabetically within each numbered category. During the initial discussion, participants listed a number of elements which were, in subsequent and continuing discussion, combined. Those sub-parts are detailed below. Elements with secondary ratings are noted.

(1) Agreed Most Important (9)

- Budget
  - Where to spend money (parking, internet, F&B, etc.)
  - Ways to enhance meeting that doesn’t cost dollars
  - Setting registration fees
  - Focus on exhibits and sponsorships for additional revenue over increasing registration fees
  - Stop providing expensive bottled water (call it corporate social responsibility, but it really is a budget issue)

- Content and speakers
  - Utilizing a needs assessment to indicate gaps and then fill them

- Logistics

\textsuperscript{14} A five star hotel is generally more expensive than a four star hotel where the services are rated based on quality.
o Location to accommodate meeting space needs

o Site sourcing process, including the development of hotel (supplier) partners\(^{15}\)

o Internet access for participants

- Organization – keeping track of all the parts [of the project]
- Participants – who are they?
  - Positioning this conference to be more valuable, unique, etc. to the target audience
- Program layout so that all parts of the program *fit together*
- Purpose: Defining the meeting’s purpose
  - Goal
  - Objectives

(1 & 2) There was disagreement as to whether the following should be a 1 or 2 (1)

- Communication with all groups involved in planning

(1 & 2) There was disagreement as to whether the following should simply be listed as “it varies” [by program] (1)

- Continuing education units

(2) Agreed Moderately Important (4)

- Adult learning, more interactivity
- Ways to keep the program new and attendees engaged
- Marketing presence online both before and after event
- Partners\(^{16}\) [multiple vendors]

(3) Agreed Least Important (none)

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\(^{15}\) The idea behind this is to develop a relationship with, for example, one hotel chain with a nationwide sales person for better rate and favorable contracts by using only one vendor thus creating buying and negotiating power.

\(^{16}\) Most events have multiple vendors which, over time, can become repeat vendors and can be thought of as partners in producing effective events.
**Focus group E.** This group discussion yielded 39 planning elements which were then rated into the following categories: (1) most important, (2) moderately important, and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. Elements with secondary ratings are noted.

(1) Agreed Most Important (10)

- Adapting to people’s behaviors; What will draw them?
- Budget, what do I have to work with?
- Budget and price points (registration fee setting)
- Content development
- Goal
- Project plan, vision; how much time you have to plan the event
- Relevance to our attendees, especially in terms of competing conferences
- Research
- Stakeholders who are they and what do they need?

(1 & 3) There was disagreement as to whether the following should be a 1 or 3: (1)

- [Sleeping] room block, day pattern

(2) Agreed Moderately Important (15)

- Balance of networking, education, trade show
- Competition from other similar events or other things going on in host city at the same time
- Content
- Day pattern
- Marketing and communication tools needed
- Member value

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17 In this usage, research means learning what you need to know as a planner to produce an event, mentioned as especially “intense” for a new event
Moving away from large plenary events, entertainment to more interactive and topical events

Reinventing event from one year to another

Relationships with exhibitors and sponsors

Site selection

Speakers, presenters, faculty, keynoters – and recruiting same

Spending reductions due to economic downturn

Time – how much do you have to work with?

Timeline

(2 & 3) There was disagreement as to whether the following should be a 2 or a 3

Return on investment; how to prove?

(3) Agreed Least Important

The attendee experience; What will persuade them to come

CEUs

Charity events

Exhibitor experience innovations

Extend life of onsite experience, networking before and after events

Format: Face-to-face, virtual, internet and video support using applications, mobile devices, impacting marketing as well as onsite

Housing patterns, [sleeping] room quality, attractive rates

International attendee needs

Logistics

New tools: Staying on top of and using them (mobile, audience response systems, etc.)

Timeline, as mentioned in this discussion, can also be thought of as a project plan or a “to do” list.
• Social events and bringing families
• Sustainability and corporate social responsibility (CSR) programs
• Travel authorizers; Helping attendees make the case to their decision-makers
• Wow factor to keep attendees coming

Focus group F. This group discussion yielded 32 planning elements which were then rated into the following categories: (1) most important, (2) moderately important, and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. Elements with secondary ratings are noted.

(1) Agreed Most Important (18)

• Benefits for Members
• Change: Can only make incremental changes
• Communication with members
• Contract negotiations
• Evaluation
• Financials, budget
• Food
• Goals
• Learning objectives
• Mission and by-laws
• Mobile applications, adding
• Time of year, location, cost and being able to afford, time of year
• Wireless access, no longer pay for [but expect]

(1 & 2) There was disagreement as to whether the following should be a 1 or 2 (4)

19 Audience response systems are software tools that allow an audience to vote or reply, the results of which can be almost instantly calculated and displayed to that audience in real time. Hardware as well as software may be required, and newer software can utilize smart phone applications.
• Marketing and promotion
• Peer-to-peer connections [more time for]
• Site inspections
• Speakers, exhibitors, sponsors

(1 & 3) There was disagreement as to whether the following should be a 1 or 3 (1)

• Emergency planning (weather)

(2) Agreed Moderately Important (10)

• Attendees vary; Small or large company? How techno-savvy are they?
  Generational differences
• Content changes, topics that are newly relevant
• Content: New laws, policies, procedures
• Economy: Tough climate makes it hard to get attendees
• Logistics: Production, audio visual aspects, transportation
• Member committees: Working with these groups who are volunteers
• Registration: No more paper registrations
• Registration: Online requires a supplier
• Space needed, the physical part of the meeting
• Union issues [with venue] impacting our meetings

(3) Agreed Least Important (4)

• Bars are no longer offering premium liquors
• Continuing education credits
• Cyber cafés no longer needed due to smart phones
• Evaluation: How to do

**Focus group G.** This group discussion yielded 20 planning elements which were then rated into the following categories: (1) most important, (2) moderately important,
and (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. Some original categories were combined and that detail is listed along with the overall topic. Elements with secondary ratings are noted.

(1) Agreed Most Important (14)

- Agenda content
- Agenda open to change with current world situation, right up until the start of the program [keeping it fresh, up to the minute]
- Board of Directors: Incorporating the millennial generation
- Budget
- Change: Keeping abreast of, keeping team open to
- Education hot topics: What does the audience need to know?
  - Call for presentations, review, selection process
  - Creating agenda and tracks
  - Determining beginner, intermediate and advanced levels
- Evaluations, focus groups: Utilizing for insight
- Exhibitors and sponsors need good exposure
  - Creative exposition hall motivators
- Goals
- Integrate freshness and energy
  - Changes needed to accommodate generational differences
  - Going green with fewer handouts and fewer, if any, tchotchkes in the exhibit hall
- Marketing plan: Social media also
- Speakers
- Strategy “How do we get there and who will help us succeed?” (Gail)
Success: What does it look like?

(2) Agreed Moderately Important (5)

- Board of Directors, extended committees
  - Working face-to-face and remotely
  - Obtaining buy-in for content
- Location, time of year
- Pieces: Working on all of them such as food and beverage, tours [logistics]
- Presentation length changing, getting shorter

(2 & 3) There was disagreement as to whether the following should be a 2 or a 3 (1)

- Live streaming of keynotes to an offsite audience

(3) Agreed Least Important (1)

- Volunteer management

Focus group H. This group discussion yielded 20 planning elements which were then rated into the following categories: (1) most important or (2) moderately important. There were no (3) least important. Elements are listed according to rating, and then alphabetically within each numbered category. Elements with secondary ratings are noted.

(1) Agreed Most Important (12)

- Audience identification
- Budget
- Economy
- Exhibits – selling and managing
- Goals and objectives
- Marketing
- Negotiating and contracts
• Program
  o Format of content, flow, seminar vs. workshop, etc.
  o Creating an atmosphere for sharing ideas, best practices, etc.
  o Networking
    o Learning that can be put to use
    o Speaker selection
• Registration
• Site selection

(1 & 3) There was disagreement as to whether the following should be a 1 or 3 (2)
• International attendees (visa issues)
• Social media: Getting more involved with

(2) Agreed Moderately Important (8)
• Audio visual
• Food and beverage
• Generational: Ways to connect the younger one
• Logistics
• Mobile phone applications
• Printing a program book
• Weather

(2 & 3) There was disagreement as to whether the following should be a 2 or a 3 (1)
• Green initiatives / budget impacts
  o No longer printing as much, more online
  o Fewer printed signs
  o Venues have green initiatives too

(3) Agreed Least Important (none)
Summary. Please see the Table 16: Number of Elements Identified, for detail on the number and rating of elements defined by each focus group.

Focus Group A identified a total of 20 elements with nine rated most important, 10 were rated moderately important and one was rated least important. Of these 20 items, there were six that were rated differently by different participants. Focus Group B identified 23 elements with eight rated most important, 12 rated moderately important, and three rated least important. None in this focus group had disputed ratings. Focus Group C identified 14 items, rating seven as most important, five as moderately important, and two as least important. No items in Focus Group C were disputed. Focus Group D identified only 13 items, the lowest number of items of any of the focus groups, but spent a lot of time grouping originally identified elements into groups. Of the 13, nine were rated most important, four as moderately important and none were rated least important. One item was disputed. Focus Group E identified 39 items, the largest...
number of items identified by any focus group, and rated 10 as most important, 15 as moderately important and 14 as least important. Two items were disputed. Focus Group F identified 32 items with 18 identified as most important, 10 as moderately important and four as least important. Five items were disputed. Focus Group G identified 20 items with 14 rated as most important, five as moderately important and one as least important. One item was disputed. The final focus group, H, also identified 20 items, 12 of which were rated as most important, eight as moderately important and none were rated as least important. Three were disputed.

![Figure 11: Element Ratings](image)

Overall, 181 items were collectively identified by the groups, and this number has not been corrected for duplicates. See Figure 11: Element Ratings. Of these 181, 87 or 48% were rated most important, 60 or 38% were rated moderately important, and 25 or 14% were rated least important. Eighteen items were disputed, that is, received an alternate rating by some discussants, or 10% of the total. The groups averaged 22.8 items, eleven of which were rated most important on average, almost nine rated as moderately important and just over three as least important (on average).
Analyzing the Elements, Identifying Patterns

**Approach.** The questioning route produced a list of elements expressed in a variety of ways from a variety of perspectives. The purpose of this inquiry was to not only identify elements, but to determine which ones were considered most important.

A variety of ways of analyzing the findings emerged. What elements were the first mentioned in each group (suggesting that these were top-of-mind), and how were these similar or different? What element(s) in each discussion did people discuss most intensely? What elements or element groupings emerged? A variety of approaches were used in considering how to understand and ultimately present conclusions these data suggest. First however, it is important to review how the data were examined. This study used a classic analysis strategy suggested by Krueger & Casey (2009).

The original transcripts were reviewed against the recordings and any corrections or additions made; they were then line-numbered and re-read multiple times. The spreadsheet created during each discussion was reviewed for each group and coded by primary and secondary topic. Spreadsheets were then electronically sorted by importance rating, followed by a secondary sort by primary and secondary codes.

Spreadsheets and line-numbered transcripts were printed and placed into a notebook for continual reference and a second set of each of these was printed for cutting and pasting. Each separate group was assigned a specific color and the assigned colored paper was used to print each set of transcripts and spreadsheets. This made a clear representation of the particular focus group by color.

The second set of documents (transcript and spreadsheet) were literally cut apart in such a way that the topic from the spreadsheet was taped to the original transcript of the discussion that created it, and then followed with the topic-rating discussion which occurred later in the focus group. This process created what might be called maps documenting discussion of each element no matter how many times it was discussed in
that one focus group. This process thus provided another reading of each transcript as
the pieces were cut and taped together, and yet another way of perceiving and
understanding. Some coding revisions were made at this stage.

These element maps were created for each element for each focus group.
Tables were employed to accommodate a sorting process by codes and provided a
tangible and visible indication of elements about which the groups, in total, had the most
discussion. It took two long tables to accommodate this code – sort – re-read – sort –
combine -- separate process. Groupings were re-read and re-sorted as themes began
to emerge and some of the coding was adjusted to be more precise and in some cases
to combine what first appeared to be separate topics too closely related to be separated.
For example, it became obvious that it made more sense to combine the original words
used by participants, including “program,” “format,” “content,” and “networking” into an
element called program design, itself a concept suggested by participants. It is also
important to note that some discussions crossed over more than one element as, for
example, this quote by Arden, “…figuring out the topics that are going to be covered,
[you] have to … figure out who the right speakers are [with] budgeting concerns [for]
transportation and feeding the speakers…. In this statement, speaker selection (coded
later to be part of program design) to meet program goal topics (the element of goals
and objectives) and budget (a third element) are entwined with the logistical concept of
transportation.

Please note that during this read-sort-reread process, the literature-suggested
topics reported in the literature review of scholarly models were not consulted, allowing
the data to more reliably suggest topics. This discouraged the researcher from
inadvertently and unconsciously fitting the findings into the literature.

Elements that were “top of mind” or first-mentioned. One way to approach
the findings is to examine the elements first mentioned in each group as these top-of-
mind responses may be the strongest elements. Remember that all participants were provided the discussion questions about three days before the focus group took place and they had hopefully had some time to ponder them. The first 10 elements mentioned were chosen for this part of the analysis as for at least two of the eight groups, the initial discussion stopped at nine before the next questioning route question was asked. These first ten elements identified are summarized in Table 17: First 10 Elements Mentioned by Group. There are several findings from this table. Goals & objectives was an element that was mentioned by every group, and for five of the eight groups, it was the first element mentioned. Every group mentioned venue\textsuperscript{20}, location, or site for the meeting. Budget was mentioned among the first 10 elements in seven groups, but was later listed in the eighth group and is the third and final element mentioned by every group.

**Three groupings emerge.** The raw data of elements listed by the cumulative focus groups was earlier reported to be 181 before analysis. These included many elements that, when coded, merged into related or super-elements and this merging was expected. Table 17: First 10 Elements Mentioned by Group, depicts the analysis of these merged or super elements indicating a pattern that separates them into three logical groups which can be called continuing professional education-centered elements, business-centered elements and venue. It is interesting that removing venue from consideration, the elements easily divide between people-centered elements and business-centered elements.

This pattern depicts the emergence then of two, overarching categories which can be described as (1) serving the continuing professional education (CPE) needs of people, and (2) the business of conferencing. Faith perhaps put it most clearly when she

\textsuperscript{20} Meeting planners generally interpret venue to not only mean physical building in which the conference will take place, but often the geographic location and the processes behind obtaining it.
### Table 17: First 10 Elements Mentioned by Group

<table>
<thead>
<tr>
<th>Focus Group A</th>
<th>Focus Group B</th>
<th>Focus Group C</th>
<th>Focus Group D</th>
<th>Focus Group E</th>
<th>Focus Group F</th>
<th>Focus Group G</th>
<th>Focus Group H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venue</td>
<td>Technology</td>
<td>Objectives</td>
<td>Organization of parts</td>
<td>Objectives</td>
<td>Goals</td>
<td>Goals</td>
<td>Goals &amp; Objectives</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>Needs</td>
<td>Marketing</td>
<td>Purpose</td>
<td>Budget</td>
<td>Time, Location, Venue</td>
<td>Needs Assessment</td>
<td>Site</td>
</tr>
<tr>
<td>Marketing</td>
<td>Program</td>
<td>Financial Planning / Budgeting</td>
<td>Goal</td>
<td>Time</td>
<td>Budget</td>
<td>Venue</td>
<td>Negotiations &amp; Contracts</td>
</tr>
<tr>
<td>Goals &amp; Objectives</td>
<td>Budget</td>
<td>History / Trends</td>
<td>Budget</td>
<td>Logistics</td>
<td>Production, AV, Transportation, Logistics</td>
<td>Agenda &amp; Content</td>
<td>Logistics</td>
</tr>
<tr>
<td>Program</td>
<td>Logistics</td>
<td>Location / Venue</td>
<td>Marketing</td>
<td>Marketing &amp; Communications</td>
<td>Speakers, Exhibitors, Sponsors as Target Audiences</td>
<td>Logistics</td>
<td>Content &amp; CEUs</td>
</tr>
<tr>
<td>Budget</td>
<td>Goals &amp; Objectives</td>
<td>Target Audience</td>
<td>New and Different</td>
<td>Target Audience &amp; Need</td>
<td>Market &amp; Promote</td>
<td>Volunteers</td>
<td>Program</td>
</tr>
<tr>
<td>Networking</td>
<td>Venue &amp; Location</td>
<td>Return on Investment</td>
<td>Content &amp; Speakers</td>
<td>Housing &amp; Venue</td>
<td>Registration (Vendor)</td>
<td>Social Media</td>
<td>Budget</td>
</tr>
<tr>
<td>Adult Learning</td>
<td>Format (Program)</td>
<td>Action Plan / Timeline</td>
<td>Volunteers</td>
<td>Speakers</td>
<td>Food &amp; Beverage</td>
<td>Length of presentations changing</td>
<td>AV</td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>Networking</td>
<td>Generations / Target Audience</td>
<td>Meeting Space</td>
<td>Networking &amp; Balance (of program)</td>
<td>Contract Negotiation</td>
<td>Exhibits</td>
<td>Marketing &amp; Social Media</td>
</tr>
<tr>
<td>CEUs</td>
<td>Strategic Meetings Management</td>
<td>Technology</td>
<td>No response*</td>
<td>CEUs</td>
<td>Site Inspection [Venue]</td>
<td>Generational Differences</td>
<td>No response*</td>
</tr>
</tbody>
</table>

* Only nine were listed before the next question in the questioning route was asked

NOTE: The words that the respondents used were used in this table.
said, “I would think that it’s really a balancing act to meet the needs of your attendees and the people that need to be educated with all the challenges you have of running a business, [an] association.”

The elements identified in these focus groups easily fit into one of these categories with one exception, that of site selection/venue which impacts both categories and by its importance in being listed in the first 10 mentioned across all focus groups, will stand alone as the third major element. Venue/location/site provides a setting for the CPE, but is one of the most expensive budgetary elements and impacts other business elements including logistics, food & beverage, and negotiations, to mention a few. This separation by (1) CPE, (2) business, and (3) venue elements does not suggest that if an element is listed in one overarching category that it does not impact the other category. The quote above clearly supports the notion of multiple relationships and impacts.

However, since the case was made in the research problem statement that continuing professional education impacts many adults and is big business, it makes sense to acknowledge that the elements found in this research actually support the problem statement emphasis with these two categories. See Table 18: Elements Identified Summary; these are explained in the detail following the table.

Table 18: Elements Identified Summary

<table>
<thead>
<tr>
<th>CPE Elements</th>
<th>Business Elements</th>
<th>Venue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Goals &amp; Objectives</td>
<td>I Budget</td>
<td></td>
</tr>
<tr>
<td>2 Program Design</td>
<td>II Marketing</td>
<td></td>
</tr>
<tr>
<td>3 Needs Assessment</td>
<td>III Logistics</td>
<td></td>
</tr>
<tr>
<td>4 Target Audience / Generations</td>
<td>IV Exhibitors</td>
<td></td>
</tr>
<tr>
<td>5 Evaluation</td>
<td>V Technology</td>
<td></td>
</tr>
<tr>
<td>6 Engagement</td>
<td>VI Research</td>
<td></td>
</tr>
<tr>
<td>7 Member Benefits / Mission</td>
<td>VII Vendors / Negotiation</td>
<td></td>
</tr>
<tr>
<td>8 Adult Education</td>
<td>VIII Contingency</td>
<td></td>
</tr>
<tr>
<td>9 Accreditation</td>
<td>IX Green</td>
<td>Stands alone</td>
</tr>
<tr>
<td></td>
<td>X Staffing / Volunteers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>XI Return on Investment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>XII Corporate Social Responsibility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>XIII International Attendees</td>
<td></td>
</tr>
</tbody>
</table>
Continuing professional education or CPE-focused elements. Overarching elements in the continuing professional education needs of people (hereinafter CPE-category) are as follows, in order by intensity and depth of discussion: (1) goals & objectives, (2) program design, (3) needs assessment, (4) target audience with a subgrouping focusing on generational segments, (5) evaluation, (6) engagement, (7) member benefits, (8) adult education and (9) accreditation (CEUs). Each element and its ratings of one, two or three, will be discussed. In some cases concepts were grouped together and this will be explained.

(1) Goals & objectives were named by each individual focus group and were named among the first 10 listed for seven of the eight groups and all groups rated it one in importance out of three. Goals & objectives were clearly the most important element identified in the CPE-category. In some cases there was little discussion, someone said “goal” and subsequently everyone rated it a one (Focus Group G). The most extensive discussion regarding goals and objectives took place in Focus Group C, where Cynthia said, “The objective gives you the master plan to figure out where everything is going to go. If you don’t know your objective at the outset, it’s not going to give you a clear idea of each piece and how you can get there.” Participants were given the opportunity to submit additional comments and to provide what they thought was the most important thing said. Seven participants across four groups commented that goals & objectives were the most important. There was clear agreement that goals & objectives was a very important element.

(2) Program Design was perhaps the most challenging of all elements to fully understand and represent. It has to do with the complex task of putting a program together while considering interrelated aspects. Ben perhaps said it best, “Absolutely the foundation, core elements: education, network, social activities, need to be looked at in
the creative design aspect of putting together an event.” It is from this quote that the term program design emerged as a way to portray this element.

No fewer than 44 groupings of discussions relating to program-design were subjected to a key word search, and when combined, yielded many repeats that were documented, sorted and reduced to 10 sub-elements. These aspects include, in alphabetical order, agenda, auxiliary events, content, exhibits, format, delivery method, networking, relevancy, speakers, and time. These will each be explained below, in order of importance based on the ratings and intensity of discussion.

Agenda as a sub-element included comments on agenda flow, keeping it fluid so that changes could be incorporated right up to the last minute, and the need to fit all parts of a conference into one schedule. Agenda was rated one in importance in all instances.

Content was the next sub-element intensely discussed including developing and determining what the attendees would need to learn, updating members, finding something attendees could use, calling for presentations and the processes around solicitation and selection, making a program more interactive, and typing for levels such as beginner, intermediate, and advanced. These comments were rated one and two.

Closely related to content was a sub-element called speakers and mentioned obtaining “really good” speakers, challenges in selecting them, and when the discussion focused on managing them and obtaining materials from them, there was collective group humor when management of speakers was portrayed as “herding cats.” This sub-element was rated one and two among the groups that mentioned it.

Format of the program was also a key sub-element. This had a variety of perspectives which included creating a learning environment, providing an atmosphere where ideas could be shared, and balance among the elements of the meeting (education, exhibits, networking). An interesting comment focused on accepting changes
driven by the adoption of technology, specifically interactivity such as tweeting, reading and replying to emails, and texting during sessions, especially while a speaker was speaking. Ratings were varied as all three levels were used to describe program format.

The sub-element of time was addressed with the words fewer, shorter and reduced. There were now fewer planned social events, and keynotes and other presentations had been or were going to be shortened. Banquets and planned social events were either reduced or completely eliminated. The time sub-element had ratings of one, two and three.

Networking and relevancy were both additional sub-elements. Each had rather cryptic quotes that delivered a cumulative message. For networking, Faye called it “more white space” indicating that program design now had to include literally more time for participants to check their voice and emails. Relevancy was perhaps summed up by creating a need for a “wow factor” per Elsa. Networking was rated one and two and relevancy two and three.

Delivery was mentioned twice in the context of obtaining an attractive geographical location as well as delivery method of face-to-face, internet, and/or video among other options. This was rated one and three.

Exhibits as an element was only mentioned once in the context of program design, but it was mentioned several times within the focus groups collectively. Most of the comments on exhibits related to budget from an income perspective and will be discussed later in this narrative in that context. It also was mentioned in the context of change and was described in the previous section relating to the focus group question about things you no longer do. Yet, it is important to be included in program design as it plays a role in overall program design and when mentioned in that context, rated a one.

Auxiliary events included programs for family. It was mentioned only once and rated three in importance.
Needs assessment was the third element within the CPE-focused category. Remembering that participants were all recruited from association conferencing, many of the needs assessment comments addressed association members’ needs. While only four of the eight groups specifically identified “needs assessment,” the discussions in two groups around this topic were extensive. A key discussion point was deciding “on whether the program is a good idea in the “first place” and referenced examining evaluations, holding focus groups with members to provide insight, and figuring out how to give them what they need because “especially in an association with this many members, we’ll never get a consensus as to what everyone wants,” (quotes all by Irene.) Needs assessment was rated one for the four groups that addressed it, and for one participant, Apple, needs assessment and deciding whether a program was a good idea in the first place was the most important thing said in the hour-long discussion.

Target audience is the next element and is closely related to needs assessment, yet different enough to be a separate category. Focus Group C discussed the topic at length, not being able to decide if their first words to describe it, “attendance-building” was related to destination, whom you were trying to serve, who else, like family members, might be coming, generational differences, how the intended audience would decide based on cost and being out of the office, or the challenging economy! The heart of this discussion returned to whom was being served. Two members of this group later came back to this topic in response to the request to identify additional elements or the most important things said. Carl said, “I should have expounded on who you are trying to serve since in my opinion, that is the starting point for all meetings”. Cathy said, “Anyway, I think the most important thing would be the attendees.” Two other focus group’s participants also made special comments about the target audience. Elsa, said (of the most important thing said) that “It is hard to pinpoint one. It was said several times, but I think knowing your audience and what they expect / need to get out of the
event is the most important factor for planners to know and consider. It is easy for us to get bogged down in the details and we must not lose sight of the strategic elements behind the event." Dana said, "Your participants are the most important, that you know them and from there you can plan and get them to come." All groups that addressed this element rated it a one out of three.

Closely related to the discussion of the element of target audience was a discussion on generational differences among those target audiences. This received enough discussion to warrant listing it as a separate item, especially as it relates to the business-related items (upcoming in this narrative) on marketing and technology. There was a perception among participants that there was a very real divide among groups whose membership included the millennial generation. Participants perceived that this generation’s expectations were so very different from the audiences they were used to serving that their association’s programs were facing real challenges in trying to serve these dual audiences. Engagement of Millennials was the primary focus. Of the groups that directly addressed this subject, the rating was split between one and two in importance.

(5) Evaluating programs was listed by many groups though it received little discussion in any group. Faith said, "If you don’t evaluate what you’re doing, you’ll never change for the better," and Gilda noted that such evaluations can lead to insight about what attendee needs are, “not just what our organization needs are.” Elsa later contributed by email that her group had not addressed the subject and she added it. The rating on the pure topic of evaluation was one. There were additional discussions on better ways of conducting evaluations which was rated as less important.

(6) Engagement has always been a goal of meetings and events and is inherent in the fact that people are meeting and are engaged in conversation and networking with one another. The way that the focus groups talked about engagement had more to do
with having to work harder at keeping them engaged and efforts to extend engagement
to precede as well as follow the actual face-to-face conference. The discussions
included shortening sessions so people can trust that they will have time to address
emails and can pay attention to the program without reading their emails during it.
Ratings were varied on this element. It may be a newer element whose genesis is
impacted by technological advances.

This element, as it surfaced in these research findings refers to a different kind of
engagement than usually discussed within adult education circles. The findings were not
around engagement with learning, formal or informal, but engagement of the attendee
with the organization and the entire program that they were attending, and this included
networking and business-to-business goals. This will be discussed more fully in Chapter
Five – Findings in the section on Insights. Support for this interpretation of this element
can also be found as one of The 7 Measures of Success identified by the book of the
same name (ASAE & The Center for Association Research (2006).

(7) The seventh element is member value and may be an element that only
relates to associations which are membership organizations. While there was not much
direct discussion on this topic, the word member was frequently used. Member value
was rated both one and two.

(8) Adult education, as a term, was not mentioned heavily in these focus group
discussions. However, elements of adult education were present within context. Refer to
the discussion on program design format where interactivity, creative learning
environment, and adapting to current learners’ behaviors were mentioned. Ben
highlighted “The need for adults to feel inclusive and needed, and to have some self-
direction when you bring them together,” during the discussion on needs assessment.
These are recognized as elements of good adult education practice. Adult education as
a topic was expressed only twice as a specifically named element out of the 181 total elements.

(9) The next element that emerged and the final one to be documented in the CPE category is that of accreditation, which is often referred to as CEUs (continuing education units). These types of credits are needed in those target audiences who have to meet professional or state licensure requirements. There were only a few participants in these focus groups that were from associations where their members were in one of those categories. As Darcy said, “Yeah, it depends on the group, really.” For those whose target audiences need CEUs, this was an important element, rating a one.

**The business-focused elements.** Overarching elements in the business of conferencing (hereinafter business-category) are as follows, in order by intensity and depth of discussion. (I) budget, (II) marketing, (III) logistics including food & beverage, (IV) exhibitors and sponsors, (V) technology, (VI) research, (VII) vendors and negotiations, (VIII), contingency planning (IX) greening meetings, (X) staffing, including volunteers, (XI) return on investment, (XII) corporate social responsibility or CSR, and (XIII) international attendees. Each element and its ratings of one, two or three, will be discussed. In some cases concepts were grouped together into one of these named elements, and this will be explained.

(I) The most highly discussed item was budget and every group addressed it, at length. There are two sub-elements that surfaced that will be presented along with budget and these are food & beverage and the economy. Further, budget is the only element where someone suggested it should rate more than a one, indeed a “one-plus” (Andrea).

Budget was described as a “big challenge…trying to do the best we can without the money,” (Apple). Another way it was expressed was as a “good financial plan,” (Carl). Curtis called it “critical.” Daisy called it a “huge consideration,” and elaborated,
“[Budget] dictates what elements we are able and allowed to include based on creating a meeting that breaks even or earns a profit for the association.” Doris was even more specific, “We face [budget] challenge with every meeting we do. What our attendees are willing to pay, how much we can actually charge them that they would pay. Trying to find that balance of what we can offer them for the money that we’re getting from them, either in dues revenue or registration revenue.” Some groups simply said “budget” and rated it a one without any discussion at all; there was silent and complete agreement in these cases. Budget was mentioned in all eight groups, and listed among the first 10 elements listed for seven of the eight. All rated it a one.

There are two sub-elements to budget: food & beverage (known in the industry as F&B) and the economy. F&B was described as follows, “It’s what they remember,” (Florence), and good-humored group laughter erupted when Fran mentioned “drink tickets.” There was agreement that the F&B part of budget was important, and later it was mentioned that some F&B offerings have been curtailed for budgetary reasons, like hot tea and bottled water no longer being offered. The current tough economic climate was recognized as challenging and impacting budget as well.

(II) The second element was marketing, promotion, and communications. This was among the first 10 elements listed for six of the eight groups, but all groups identified this element. What was meant by the word marketing was not detailed by participants; the connotation was likely that all on the call would understand what it meant. Over the full course of all the discussions things related to marketing a conference informed implied meaning. Participants mentioned brochures, email, and website. Brochures were discussed in the context of no longer printing but pushing potential attendees to the organization’s website to download handouts that they wanted. What was discussed with quite some intensity was the use of social media such as facebook, twitter, and LinkedIn as part of a marketing campaign, especially to
influence and catch the attention of younger generations. Alison called it, “Trying to add social media to [the] promotion schedule that we hadn’t … [incorporated] before.”

Another aspect of the marketing plan was using social media for “Promotion prior. Then during. Then we started to use it this year post event. Flickr to post photos…I think it is the direction everyone’s going to,” (Hannah). Marketing the program itself was generally rated a one, but the use of social media ranged from one to three. Faye sent a note after the focus group noting that for her, the most important thing that was said was, “The value of the meeting and the communication of that value,” which is, in itself, perhaps a clever definition of the marketing being discussed.

(III) Logistics was the next most identified, business-related element and it had a subset emphasizing the need to organize logistics in time, or applying a timeline. On a more granular level, it includes, as participants listed them: production, audio visual, transportation, room set, and offsite events. Also mentioned were food & beverage (the organization of), and meeting space needs. These quotes clarify this element. Ginny said, “Putting the little pieces together that are involved in the conference,” and Dawn called it, “Organization, tracking all the moving parts.” Danielle said, “The whole program put on paper is a huge step, time consuming, and involves a lot of parties in the process of that planning.” Hank noted that “prioritizing” was very important in the logistical effort. All of the focus groups talked about logistics and most rated it a two.

(IV) Exhibitors and sponsors received some discussion. This part of an association event is related to revenue and thus budget, networking, and keeping the exhibitors and sponsors happy with high quality exposure to the attendees (which is what they are paying for), as well as the actual work of selling exhibits and attracting sponsors. Of the four groups that mentioned this, only one discussed it at any length and most rated it a two. This may be because some associations have sales divisions who may be separately responsible for some of the efforts in this arena.
(V) The next element that emerged related to technology. Five groups discussed incorporating new technologies such as mobile applications for the onsite program, audience response systems, and live streaming of keynotes. The discussion also related to marketing and going green (making decisions that have less impact on the planet, using fewer non-renewable resources, and so on). Five groups addressed technology as an element and most agreed that it should be rated a two. However, for one group it was clearly rated a one and for another, one respondent said that for her, it was the most important thing said.

(VI) There were interesting discussions around the element of research from two perspectives: trends in the industry and research around understanding a repeating or a new conference (utilizing your own collected data). Elinore said, “I’d have to agree with the [others]; staying on top of all the tools and changing technologies, trying to incorporate them, which ones we can step wise do, can do, without going crazy, too scared, to make sure they work, that they’re adopted.” Andrea noted that, at least for herself, working as a lone meeting planner, she finds it challenging to keep up with new ideas, and has few with whom to discuss them. There was no rating consensus on the topic of research, perhaps because each discussion focused on differing aspects.

(VII) An element emerged that can be summarized as vendors and negotiation. Some of the groups used the terms outsourcing or partners to describe the work with contractors for transportation, hotel, a production company, security and the like. Negotiation had to do with processes to bring each of these service providers to contract. Budget implications were mentioned. Registration\(^{21}\), is perhaps a subset of this in that it often requires a vendor. There was indecision as to whether this would be rated a one or two.

\(^{21}\) There are software companies that provide registration and merchant services as well as electronic storefronts and online shopping baskets that serve conference registration needs.
(VIII) Contingency planning was discussed. For two individuals, Carl and Heather, it was the most important thing said. Types of events that would necessitate crisis management that were mentioned included weather, union issues, any force majeure event, or a key speaker who is a no-show. The rating of this element can best be described quoting Faith’s response, “It’s a one if it happens…and it’s a three if it doesn’t.” Bess said, “We are all optimists; there will never be a crisis,” which drew laughter from that group.

(IX) The element of ‘being green’ refers to reducing impact on the earth and its resources. Specific examples included not printing brochures, marketing only electronically as well as only electronic signage utilizing fairly new hotel signage systems, and considerable discussion around speaker handouts where Heidi suggested that this was an effort that resulted in “pushing [printing] cost to the attendees.” While this was not an element discussed across many groups, there was intense and lengthy discussion in Focus Group H. Green was identified as having budget impact, yet Heidi summed it up this way, “As much as I’d like it to be [a] one, it’s not critical to the success of the event.” Crystal contributed this element of green meetings by email when she realized it had not been discussed in her group.

(x) Staffing and volunteers were related discussions. Bess described it this way, “…we’ve noticed over the years we’ve become leaner and meaner, not more staff, but continue to add more programs.” Staff were thus portrayed as stretched to do more and more work. Other concepts included outsourcing as well as staff at on site, which is related to the use of volunteers to augment staff. Volunteer members as extended staff also present challenges as Gilda said, “They’re not dependable,” and others acknowledged that volunteers provided “valuable input” (Florence). Staffing / volunteers was rated two or three.
(XI) Return on investment (ROI) was mentioned in the context of measurement and benchmarking (Focus Group B), and what attendees, attendees’ employers, and program committees can expect to “get out of it; the overall return for the conference,” (Cynthia). This was rated a two.

(XII) Corporate social responsibility (CSR) was only mentioned once and it was rated lowest, a three. However, it was discussed with some intensity and thus included in this list. CSR has to do with intent to give back to the community and may take the form of a charity event to provide funds to a host city organization.

(XIII) International attendees was mentioned by two groups with visa issues listed as a concern as well as making them feel welcome and well taken care of. It was rated both a one and a three and seemed to thus depend on applicability as not all respondents had international attendees.

**Venue as the Third Overarching Element.** The third overarching element of venue stands alone as it relates to both of the other elements, CPE and business elements. It is the stage on which the event is set. Comments and discussion on this element, mentioned in the first 10 elements by every focus group, ranged from “It was the most important thing following goals & objectives,” (Hannah), to “It’s all about location, location, location” (Hank), and “It’s certainly not the most important, but important for the audience,” (Arden). Discussion within this category included the site selection process, changing day patterns in order to get better sleeping room rates, and consideration of what else is in the target city at the same time that might impact your event. One respondent had a very specialized type of conference with highly interactive events suggesting that site selection can also be specific to the CPE needs of the group. Ratings represented a range from one to two.

There were only a few comments that were discussed that did not seem strong enough to be listed as elements. These included the role of bylaws necessitating the
inclusion of an annual meeting business session at the annual conference, strategic meetings management already referenced as having more implications for corporate meeting planning, and changing patterns of communication at a venue. Some additional comments centered around change such as adding poster sessions, how much planning time is allocated to a conference, integrating “freshness and energy” (Gilda), getting new people onto the Board of Directors, eliminating events after careful review (Gail) or “being open to change” (Gilda), even “Doing it [change] even if you don’t want to” (Gail). So, while change itself does not particularly fit with the concrete concept nature of the other elements, it was a theme that threaded throughout the discussions.

Summary. There were many elements identified and it is important to remember that the purpose of this research was to identify the elements that practicing professionals utilize, not to judge the value of what was identified. It was the goal to identify and understand them. The previous section provided detail into the identification by highlighting key discussion points. Previously, Table 18: Elements Identified Summary, provided a list of elements by category, in order of relative importance within each category. The Continuing Professional Education Elements identified are goals and objectives, program design, needs assessment, target audience with a sub-element of generational differences, evaluation, engagement, member benefits, adult education and accreditation. Business elements include budget, marketing, logistics with a sub-element of food and beverage, exhibitors, technology, research, vendors and negotiation, contingency, green meetings, staffing with a sub-element of volunteers, return on investment, corporate social responsibility, and international attendees. The third overarching element was venue and it had relevance to both the CPE and business elements.
Chapter 5-- Summary, Insights, Implications, and Recommendations

Introduction

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

The purpose of this study was to identify the elements that practicing meeting planning professionals in associations utilize in CPE conference planning. Further, this study is interested in which are considered the most important elements. This led to the formulation of the following research questions: (1) What program planning elements do meeting planning professionals consider in their process of creating and delivering a continuing professional education conference? (2) What do these meeting planning professionals consider the most important elements? And (3), of all the program planning elements listed and ranked, which three do meeting planning professionals concur are the most important for a successful conference?

This study effectively accessed a senior group of association planners by limiting the target population to those who had earned a CMP and/or CMM, credentials offered by meeting planning industry associations. In all, 40 participants had a cumulative 784 years of experience or just over an average of 18 years each, making this a highly experienced group of industry professionals. There were no two participants whose experience was alike and there were differing descriptions on how they achieved their
measuring planning knowledge, though most cited on-the-job or through associations. Further, job descriptions and responsibilities varied. This does not detract from the study because though experience, knowledge acquisition, and job assignment varied, the elements of meeting planning discussed were understood by those on each call, the elements merged logically into groups, and many related to the literature.

This qualitative research was conducted through focus groups where the meetings took place online using the software tool, GoToMeeting and its incorporated voice-over-internet-protocol (VOIP). Focused discussion and interaction were well supported in this medium, and the software allowed for clear recordings and accurate transcripts. Computer screen sharing with participants further allowed for a verification of elements because participants were able to see what they had created on the shared screen and either verify or clarify them in real time. All could literally see the element being rated.

**Research Findings Compared with the Literature**

**Introduction.** The literature review presented 10 program planning models pertinent to continuing professional education. Each listed what the author considered the elements of program planning from their unique perspective, which in most cases, was not CPE conferencing in particular, but adult education programs in general. It is important to remember that the models cited appeared to either be created from the author’s knowledge and experience, or were reviews of other’s models and a new one was created by combining a variety of existing ones. Of the 10 models, the Pennington & Green (1976, p. 17) model (see Figure 6) was the only one created using grounded theory research and identified populations which included program planners in the professional arenas of “business administration, educational administration, law, teaching, social work and medicine” (1976, p. 15). Although the very large field of medical continuing professional education was not targeted in this research as it is a
field unto itself, no other studies were found that asked professional planners what elements of planning they actually utilized in their planning process.

The models used for comparison included those by Tyler (1970), Houle (1980), Knowles (1980), Nadler & Nadler (1987), Cervero (1989) and Sork & Buskey (1986), Nowlen (1988), Sork (2000), Caffarella (2002), Pennington & Green (1976), and the ADDIE model (ASTD, 2010). These are discussed in depth in the literature review and will be referenced repeatedly in the discussion that follows.

Theory and models are important tools in all fields, but theory and models may be different from what actually happens in practice. Practice research is thus important. The research reported herein used grounded theory and a constructivist orientation utilizing focus group methods with a very specific group of practitioners. The findings create a description of the elements that the association-type continuing professional education association conference planners in the study are currently utilizing. The words currently utilizing are very important and purposefully used to describe this research since change was a theme running through many if not most of the discussions. Change was seen to have a big impact especially around the application of technology and social media. Findings of a similar study may be different in practice a few years hence as continuing change may bring new elements to the forefront. Even so, how do the findings of this practice research compare with the nine theoretical models and the one model, Pennington & Green (1976), derived from similar grounded research?

The literature-cited models contain a wide variety of elements with considerable variability in wording. These elements require some interpretation. The challenge in this section of this research report is to make the comparison of findings with literature relevant, succinct, and useful. Some overall observations are pertinent before the element-by-element comparisons are delineated.

- Many elements identified in the research are clearly represented in the literature.
• Some research elements are not described in the literature.
• The literature describes only one element that was not also discovered in this study, the element of ethics, which could be argued, is not a planning element, but an overarching professional element. Perhaps it has more to do with professionalism than project planning in the form of CPE.
• The separation of elements into different categories of CPE-related, business-related and the third and separate category of venue is a new perspective not evident in the literature.

The discussion that follows, comparing the research findings with the literature, will follow the order previously used in describing the research findings. That is, the following discussion will be ordered utilizing the three overarching categories and their sub-categories.

In summary of the findings, the elements identified in this research easily sorted themselves first into two categories, those that were related to CPE and those most closely related to business. The third category, venue, has tremendous impact on a number of the CPE-elements such as program design, engagement and member benefits, and certainly also impacts key business elements including budget and logistics, among others. Because it impacted both other categories, venue was put into a category by itself. It should be noted that the focus group participants did not make a distinction or identify these three main categories of elements during the discussions. The separation into these three categories is a construct that developed from the analysis of the data providing a way to explain practice and confirms that the business of adult education through continuing professional education conferencing is an important feature of this type of adult education practice. No one comment explains the business impact of association conferences better than this quote from Faye,
I was … 12 years in the trade association, hired for their annual convention and trade show which made the association operate in the black, the one month of the year we had it; we used that money the other 11 months. [The conference attracted] 8,000 people, 350 exhibiting companies, [an] education platform, [all in a] 3 day event in Boston. What was always the best thing is when it came in better than budget since the 24 people on the payroll were hanging on my head to make sure they had another year of employment.

CPE impacts many people, and it is big business in associations, thus confirming an earlier premise.

It was quite challenging to compare the elements that emerged in this research with the 10 program planning models reported in the review of literature as each cited model approached from differing perspectives. First, the Tyler model (1970) is the oldest model and primarily addresses the idea of setting measureable objectives. The Nadler & Nadler (1987) and Nowlen (1988) models were more based in practical application. Pennington & Green (1976) developed their model based on grounded theory research with practicing professionals, and the ADDIE (ASTD, 2010) model was developed as a tool for training, a similar but different construct from conferencing. Caffarella (2002) evaluated numerous existing models and fashioned them into a comprehensive overall model with many parts; it is a more complex model than the others. Cervero, Sork, and Caffarella each continue to research in the field, but seem to each focus on particular niches. The research reported in this study could also be described as a niche area for research.

Thus, there was a challenge in how to perceptually compare the findings with these highly varied models. The approach taken was to literally map the elements of every model to the elements identified in the findings of this research. The following
narrative examines each element identified in the focus group research with the collective mapping of all of the models to that one element. The models often had a logical and direct mapping to an element.

**CPE elements.** The first set of findings to be compared with the literature are the CPE-related elements of (1) goals & objectives, (2) program design, (3) needs assessment, (4) target audience / generations, (5) evaluation, (6) engagement, (7) member benefits / mission, (8) adult education, and (9) accreditation. These will be addressed in the order given.

(1) Goals & objectives mapped specifically to the models by Tyler (1970), Houle (1980), Knowles (1984), Cervero (1989) and Sork & Buskey (1986), Nowlen (1987), Sork (2000), and Caffarella (2002). This element was strongly represented in the study and is strongly supported in the literature.

(2) Program design is an overarching term and includes agenda, content, format, delivery, networking, relevancy, speakers, and timing. It represents a collective idea. Likewise the models cited support this collectivity with many statements in individual models fitting into this element. Tyler perhaps said it best, “How can educational experiences be effectively organized?” (Tyler, 1970, p. 1). Knowles called it “designing a comprehensive program” to which he dedicated an entire chapter in the *Modern Practice of Adult Education* (Knowles, 1980, p. 127). Caffarella’s model included these headings: sorting and prioritizing program ideas, design instructional plan, design transfer of learning plan, and selecting formats and schedules which all fit into this element as detailed by the focus groups” (2002, p. 21). All of the models in the literature support this element and there is general agreement as to what it means.

(3) Needs assessment is the third element identified by this research. Six models cited from the literature directly support this element including Knowles (1980), Cervero (1989) and Sork & Buskey model (1986), Nowlen (1988), Sork (2000), Caffarella (2002),

(4) Target audience / generations is the fourth element identified by the focus groups in the CPE-related category. This element was not mentioned in the models cited in the literature with the exception of Caffarella who includes it under the heading of "preparing budgets and marketing plan," where it appears in a table detailing sub-points (2002, p. 24). As in Caffarella (2002), this element is likely related to the business element of marketing, but it is also directly correlated with the continuing professional education needs of that target audience and has an impact on overall program from that perspective. Further, in associations it can be somewhat separate from needs assessment which has to do with members' overall needs whereas target audience in this sense focuses on the segment(s) within that larger group to which the program will appeal and specifically whom it is designed to serve. There was consistent concern voiced in these focus groups related to serving generationally different members' needs and meeting differing expectations of those generational groups. Thus the word, generations, has been connected to this element to highlight this persistent viewpoint. Generational differences among target audiences was not addressed in the literature; perhaps this is because most of the models were formulated before there was a body of knowledge concerning the needs of Generations X or Millennials as mentioned in these discussions. A review of the literature on the importance of generational differences in instruction was conducted by Reeves and supports this point (2008).

(5) Evaluation was the fifth element identified in the focus groups. Every model cited in the literature directly referenced evaluation.

(6) Engagement was the sixth element identified by the focus groups in their discussions. Although the cited models used words like 'hold the program,' it might be
assumed that engagement would mean the same thing, but engagement as the focus groups discussed it is something else and no model addressed it. The context was literally getting people actively involved and participating not just at the event, but with the organization. The event was a means to that end for the organization. It included getting people to register and attend, as well as people-to-people interaction in the educational programming, but also during breaks and social events. Even golf is an example of programming to the purpose of engagement among attendees. This may be an element specific to association CPE.

(7) Member benefits / mission was the sixth element that surfaced in the focus group discussions. Four of the cited models address the ideas of context and community, and these included Knowles (1980), Cervero (1989) and Sork & Buskey (1986) model, Sork (2000), and Caffarella (2002). Knowles (1980, pp. 66-72) is perhaps the most astute in referring to it as the organizational climate, which the respondents clearly identified in this research. Knowles’ description of organizational climate, “to meet …needs and achieve…goals” can be directly related to mission as it was utilized by the respondents in this research (Knowles, 1980, p. 66). Knowles (1980) did not address association type organizations, but limited his discussion to universities, health and welfare agencies, and public schools. Yet, for the purposes of this study and comparison with the literature, perhaps Knowles’ (1980) description of organizational climate and its importance resonates with the findings of this study, that meeting professionals recognize the need to pay attention to the mission of the organization. In addition to the models, the importance of mission was also supported in the literature in the 7 Measures of Success study. Of the seven elements identified in that study, one specifically says, “Alignment of products and services with mission” (ASAE & The Center for Association Leadership, 2006, p. 2).
(8) Adult education was mentioned as an element by focus group participants within the context of applying good adult education practice, but it was an element with fairly minor mention. Although we understand that all of the models cited are part of the collective literature on adult education, only Knowles (1980) specified it by name in his model. Perhaps good adult education practice was such an underlying assumption that the adult education writers whose models have been selected and cited embedded their models squarely on its foundation but did not include it as a separate element.

(9) Accreditation as an element was very important to those association planners whose target audiences’ needed CEUs as a member benefit. For those planners for whom this element is pertinent, it may represent considerable effort depending on the scope of the application and award process. It is not surprising that this element surfaced among association planners since their organization serves specific types of workers or professions who may or may not have licensure or certification requirements. None of the models mentioned this element.

**Business elements.** The second set of findings to be compared with the literature are the business-related elements of (I) budget, (II) marketing, (III) logistics including food & beverage, (IV) exhibitors, (V) technology, (VI) research, (VII) vendors and negotiation, (VIII) contingency, (IX) green, (X) staffing and volunteers, (XI) return on investment (ROI), (XII) corporate social responsibility, and (XIII) international attendees. These will be addressed in order. However, it is important to mention that three of the models, those by Knowles (1980), Cervero (1989) and Sork & Buskey (1986), and Sork (2000), utilized an overall category of administration which is interpreted to include business type elements.

(I) Budget was the strongest element that emerged among the business elements and was referenced in planning models by Knowles (1980), Nadler & Nadler (1987), Cervero (1989) and Sork & Buskey (1986), Nowlen (1988), and Caffarella
All of these models directly used the word budget. Budget as an element was strongly supported in the literature.

(II) Marketing was the second business element emerging from the research and the models by Knowles (1980), Nadler & Nadler (1987), Cervero (1989) and Sork & Buskey (1986), and Caffarella (2002) all also contained marketing as one of the elements in their models. This element was supported in the literature.

(III) Logistics was the third element emerging from this research. Nadler & Nadler (1987), while not calling it logistics, listed several items that would be included under a topic called logistics. These included meeting and function rooms, AV, food & beverage, transportation, entertainment and registration. The Cervero (1989) and Sork & Buskey (1986) model, and Caffarella (2002) also included a logistically-related element in their models. This element was supported in the literature.

(IV) Exhibitors were the fourth business-related element that emerged and only Nadler & Nadler’s (1987) model referenced exhibits. This represents an element perhaps mostly new to the literature.

Technology (V) was the fifth element, (VI) research was the sixth, (VII) vendors and negotiation the seventh, (VIII) contingency the eighth, and (IX) greening events the ninth. None of these elements appeared in any of the models cited. These elements were not supported in the literature.

(X) Staffing and volunteers was the tenth element and was only addressed by Caffarella (2002) in her model.

(XI) Return on investment (ROI) was the eleventh element and it seems reasonable to relate it to reporting, as addressed in the models by Knowles (1980) and Caffarella (2002). Thus, the element of ROI that emerged from the research is similar enough to the model description of reporting to consider this element supported.
The final elements of (XII) corporate social responsibility and (XIII) international attendees were not mentioned in any of the models and were thus not supported in the literature.

**Venue.** Knowles (1984), Nadler & Nadler (1987), and Nolen’s (1988) models all referenced site or facilities, thus falling into the element of venue, the third overarching category that emerged from this research. As previously described, venue was mentioned by all focus groups within the first 10 elements identified. It was designated the third overarching category and stands alone because it has implications relating to CPE elements as well as business elements, with program design and budget the two most important sub-elements, respectively. Noting its importance as it emerged from this research, venue was only partially supported in the literature.

**Elements in the adult education planning models but not in the research.** Only two elements were identified from the 10 models cited in the literature review that were not discussed during the research. Sork (2000) discussed ethics and made it an important feature of his model. Three parts of the six parts of the Pennington & Green (1976) model were not captured in any of the elements emerging from this research. These were: 1. Originating the idea, 2. Developing the idea, and 3. making a commitment. (1976, p. 17), and these actions would seem to precede in time most of the elements that surfaced in this research. Actually, originating the idea may conflict with the notion of needs assessment as it is practiced today, however, the Pennington & Green (1976) research was some time ago and it is possible that the application of needs assessment processes as practiced today, is an evolution of practice. From this perspective, it is perhaps not an outlier at all.

**Summary of elements as supported in the literature.** The purpose of this section is to compare the program planning elements that practicing meeting planning professionals in associations utilized and considered most important with the 10
planning models reviewed in the literature for this project. From the research, three overarching categories of elements emerged including continuing professional education elements, business elements, both with multiple sub-elements, and venue as a stand-alone element. This section summarizes the research elements found compared to the literature. If half or more than half of the 10 models in the literature mentioned or supported the discovered element, the element was deemed strongly supported. Mention or support in the literature of less than five but more than zero have been deemed supported. Elements not identified in the literature at all were listed as not supported. See Table 19: Elements as Supported in the Literature. The narrative to discuss this table follows.

- The following CPE-elements were strongly supported in the literature: (1) goals & objectives, (2) program design, (3) needs assessment, and (5) evaluation. These elements were supported in the literature: (4) target audience / generations, (7) member benefits / mission, and (8) adult education. These elements were not supported: (6) engagement, (9) accreditation.

- Only one business-related element was strongly supported in the literature and that was (I) budget. The following elements were supported in the literature: (II) marketing, (III) logistics, (IV) exhibitors, (X) staffing and volunteers, and (XI) return on investment. These elements were not supported: (V) technology, (VI) research, (VII) vendors and negotiation, (VIII) contingency, (IX) greening events, (XII) corporate social responsibility, and (XIII) international attendees.

- The overarching category of venue was supported in the literature.
Research Findings and the Concepts of Change and Strategy

The review of literature included a section addressing strategic planning, the concept of change, diffusion of innovation, and strategic planning models. The researcher’s practice experience suggested that these concepts might arise within the focus group discussions. This is based on the notion that CPE is a process as well as a product. Some findings are relevant to these topics and are discussed below.

Change was an underlying theme throughout each of the focus groups. When the elements identified were additionally coded for this concept, it appeared as a descriptor or perhaps more correctly, motivator, in about 20% of the elements identified.
Most of the discussion on change had to do with the impact of technological change, but budget imperatives such as reducing cost, as well as changing program design to accommodate more networking were also identified. Brager and Holloway (1978) identified three types of organizational change, one of which was technology and they suggested that this type of change would be significantly impactful. The findings of this study tend to agree. Technology was the face of change in these discussions, and every group discussed technological changes.

Other insights on change come from Malcolm Gladwell (2002) who suggests that some ideas can be described as sticky or contagious, and that it matters who suggests these ideas. Two of the elements identified in this study may be examples of this. They are the concept of green and of corporate social responsibility. These ideas are relatively new, currently well represented in the trade literature. A search on the member-only section of the MPI website reveals hundreds of articles, webinars, case studies, white papers, and audio and video resources on these topics. One wonders if the ideas of green and CSR have caught on because MPI, a highly regarded organization, has suggested them? Are these ideas sticky? (Does the notion of greening your meeting simply resonate?) Does promotion by MPI, a highly respected organization make them catch on? We don’t know this without further research, but there is a possibility that this may be true. Perhaps we can consider the adoption curve (Rogers, 1983) and suggest that these ideas are now into the early majority as suggested by this research where some were doing and more were considering – and all understood the concepts without having to define them.

The literature review also looked at organizational change (Simerly, 1987), but ideas on that topic did not arise in the findings. It is possible that since this study focused on the process/product of CPE conferences, that the scope of the study limited the discussion from addressing the larger topic, organizational perspectives. The 7
Measures of Success study found three categories, within which there were seven characteristics that informed organizational success. Of these, (2) “Alignment of Products and Services with Mission,” and (4) “Dialog and Engagement” were elements identified in this study’s findings (ASAE & The Center for Association Leadership, 2006, p. 2). These were discussed earlier when the research findings were discussed one by one.

In summary, some of the ideas on strategic planning and change appeared to surface among the findings. A background understanding of these ideas and perspectives informed the researcher’s perspectives during the analysis of the data.

**Some Practical Process Challenges and Their Implications**

It was a challenge to rate the planning elements on the following scale (1) most important, (2) moderately important, and (3) least important when the discussants were originally asked to list the most important elements in continuing professional education conference planning in the first place. During the course of the focus groups, the researcher developed the following explanation of this process, which seemed to work to help the respondents rate their elements. “We know that everything [that you listed] here is really important. But now I’d like to know how important each of these really important things is by rating them from one to three. It’s possible to say this really is the same as that and move items. I’m looking for consensus as much as possible through sometimes we won’t come to consensus.”

At the conclusion of each focus group, the researcher and the transcriptionist discussed the practical experience of implementing the group. This conversation was recorded and later transcribed by the researcher. Each group was quite different from the others. With one group as an exception, there were occasional silences. That group talked a lot more and a lot faster, challenging the transcriptionist. The action of typewriting caused some clicking sounds that were picked up by the recording, but it did
not seem to interfere with discussion. The transcriptionist observed that one group in particular appeared less individually engaged. This was a group that did not start on time and in which people joined late, after the request to refrain from multitasking had been issued. The headsets and technology worked well on every call. Transcripts were delivered within a few days of the conclusion of the group and were exceptionally accurate when checked against the recording.

Participants were sometimes multitasking including eating, and in some cases, when attention to the discussion appeared to wane, were perhaps also attending to email or some other distraction. When the eating became obvious, the researcher made a joke that now we were all thirsty because we heard a soda can open. This was an effective method to reduce noise interference. Multitasking could not be stopped, but only discouraged by request.

There were several instances where scheduled participants cancelled at the last minute or simply did not attend. There were also a few instances where potential subjects accepted the invitation, then backed out. However, the number of participants, whether the minimum of three or maximum of six, really did not seem to appreciably impact the quality of the call based on the discussions that actually took place. This was surprising.

Despite every effort to inform participants at initial recruiting, in the informed consent document, verbally at the head set test, and in writing in the email prior to the start of the group, some participants started by introducing themselves by full name and organization. When this happened, the researcher gently interrupted and explained that we wanted to keep these things confidential so that people could speak freely. This limited the breach as much as possible to the initial speaker only.
Summary of the Process and Findings

In order to answer the research questions, 40 participants were recruited and participated in eight, separate, online focus group discussions held from 22 June 2011, through 24 August 2011. Subjects were recruited from the membership of Meeting Professionals International (MPI) and called in order based on a random numbers program, Research Randomizer (Urbaniak & Plous, 2011), applied to a list of over 2,000 potential participants. Subjects were limited to MPI planner members with the designations of Certified Meeting Professional (CMP) and/or the CMM, Certificate in Meeting Management, both achievement credentials that confirm their experience and knowledge of meeting and event planning. The potential list was limited to association type planners rather than corporate planners as the style of planning is quite different between these two major types.

Participants were prepared for their focus groups through a short interview, answering any questions they might have, and provision of the university approved informed consent document delivered by email. Verbal approval was requested and received according to university approved policy. An incentive as well as a tool to be used during the online discussions, a headset with microphone was purchased by the researcher and mailed to each participant and once received, tested on the GoToMeeting online platform to ensure the equipment worked, that GoToMeeting was accessible on their computer, and that they became familiar with how to use both GoToMeeting and the headset.

About three working days prior to the focus group into which they were scheduled, an email was sent to each participant with the semantic differential survey and the questions that we would discuss on the focus group call. Surveys were requested to be returned before the call was to take place. The purpose of the survey and the questioning route was to stimulate and focus participants’ thinking.
Following the focus groups, the transcriptionist forwarded the transcript to the researcher and these were compared with the recordings and edited for accuracy. The spreadsheets of elements created in each focus group were augmented with the results of contributions subsequently received by email from participants. These included what the participant thought was the most important thing said in the discussion, as well as anything a participant felt has not been said during the group and wished to add. These spreadsheets, with each element identified by a rating of one, two, or three signifying importance, were then coded into primary and secondary categories which were used to sort the spreadsheet by importance and code.

Transcripts and spreadsheets were read and re-read. Then each spreadsheet was literally cut apart by element and joined to the original transcript discussion that created it as well as to the discussion pertinent to its rating of one, two, or three. This was done for every focus group, for every element. Then, the researcher grouped these topical findings into piles where the intent of the element matched or corresponded with the elements from other focus groups as coded. Since the spreadsheets and transcripts were printed on colored paper by focus group it was easy to identify the group from which it originated and understand the context of the discussion, especially if it was a complex discussion with multiple elements discussed at once as was often the case. In addition to the use of colored paper, all transcripts were line numbered making it easy to trace back to the conversation in context as well as to quote accurately. Additionally, the focus groups were named by alphabetical letter, A through H for eight groups, and pseudonyms were issued to each participant so that they could be quoted (and again backtracked) to the group in which they participated. That is Faye was in Focus Group F and Ginny in Focus Group G, and so forth.

Results were reported both by elements identified by each focus group, and also by examining which elements were identified for each questioning route question. This
process provided insight into the importance of the elements, the context in which they were mentioned in the full discussion, as well as how they may have surfaced repeatedly when probing for “challenging” or “changing” elements.

Twenty-three element groupings eventually emerged from the original 181 elements cumulatively identified by the groups. Three overarching elements also emerged from this list. Overarching elements in the continuing professional education needs of people (CPE-elements) category are as follows, in order by intensity and depth of discussion: (1) goals & objectives, (2) program design, (3) needs assessment, (4) target audience with a sub-grouping focusing on generational segments, (5) evaluation, (6) engagement, (7) member benefits, (8) adult education and (9) accreditation (CEUs). Business-related elements included (I) budget, (II) marketing, (III) logistics, (IV) exhibitors, (V) technology, (VI) research, (VII) vendors and negotiation, (VIII) contingency, (IX) green, (X) staffing and volunteers, (XI) return on investment (ROI), (XII) corporate social responsibility, and (XIII) international attendees. Venue emerged as a stand-alone element that was also a category unto itself.

These elements were compared with the literature and comparisons were made using the following scale. If half or more than half of the 10 models in the literature mentioned or supported the discovered element, the element was deemed strongly supported. Mention or support in the literature of less than five but more than zero have been deemed supported. Models not identified in the literature at all were listed as not supported.

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

The overarching category of venue was supported in the literature.

**Answering the Research Questions**

Three research questions were asked and will be answered in order.

**What elements were identified?** The original research question was “What program planning elements do meeting planning professionals consider in their process of creating and delivering a continuing professional education conference?” There were 181 original elements that surfaced and were coded, and after analyses resulted in 23 individual elements in three categories: Continuing Professional Education, Business, and Venue. They are listed in order of importance based on the intensity of the discussions around them in Table 18: Elements Identified Summary.

**Which are the Most Important?** The original question was, “What do these meeting planning professionals consider the most important elements?” From deep analysis of the discussions, the most important elements identified are as follows:

- **Most important CPE-Elements**
  - Goals & objectives
  - Program Design
  - Needs Assessment
  - Target Audience / Generations

- **Most important business- elements**
  - Budget
- Marketing
- Logistics including food & beverage

- Venue was an element important to all and also a stand-alone category as it has important implications for the other two categories.

**What are the Top Three Elements?** The exact question was, “Of all the program planning elements listed and rated, which three do meeting planning professionals concur are the most important for a successful conference?” The three most important are goals & objectives, budget and venue.

**Association Conference Planning Model -- A Model from Research and Practice**

This model, see Figure 12: Association Conference Planning Model, combines the findings from this small group of practitioners with the researcher’s years of practice. The research only sought to identify elements that practicing professionals were using. They were ordered in the findings according to the strength of their identification among the focus groups. The research did not seek to determine an order to practice. The ordering and relationships indicated in this model include all of the elements included in the findings, ordered by the practice experience of the writer.

This model has a definite order; it is a linear model with a beginning and end. Conference projects do indeed have a beginning and end. Additionally, some things have to be decided before other things but that does not mean that one element is not revisited many times during the program development process. For instance, the venue for the 2015 Annual Meeting may have already been contracted by 2011, with budget, goals and objectives, as well as other elements projected from current practice and experience. So, while this model is linear, envision it as a rather circular process, where the end informs the next beginning, since many association meetings happen annually.
Figure 12: Association Conference Planning Model ©
However, caution is strongly suggested. Conferences are complex projects and meeting professionals usually have project plans and lists that are far more complex than this conceptual map. This model is not prescriptive, but descriptive of the process as a means of providing a perspective on the elements identified in this research. The best advice for becoming a professional meeting planner and adult educator is to study both, incorporating the best learning in each arena into practice – to the benefit of the organization’s mission, membership and target audience, which are the overarching drivers.

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

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

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

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

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

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

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

**Insights**

**The elements.** The most important conclusion relates to the findings and classification of the elements. Some of the elements identified in this study were supported in the literature to some degree, but some were new. Only two elements identified in the review of literature did not surface in the findings, ethics, and some parts of the Pennington & Green (1976) model, which perhaps have been subsumed in newer thinking and description. Please refer to Table 19: Elements as Supported in the Literature.

It is not surprising that some elements were strongly supported, some supported, that is, were found in a few models, and some elements found in the research were not found in the literature. To a smaller extent, only two elements in the literature were not identified in this research. As has been suggested throughout this research report, the theoretical field of adult education and the practice field of continuing professional education conferencing do not seem to be very well linked. The practice manuals offered by the meetings professions industry noted in the literature review barely cite the adult education literature, and no participants in this group of research subjects had an educational background in adult education, except the researcher. However, this is a practice field and perhaps we can be encouraged that there are findings which do indeed overlap with the literature.
Of the nine CPE-related elements, only two were not supported. However among the 13 in the business-related elements, nine were not supported. This may not be terribly surprising in the sense that CPE literally has the word ‘education’ in it and the models selected were from the education literature. However, if CPE and business are integrated parts of conference planning, should there be models that incorporate business elements to a greater extent?

**Recruiting.** Recruiting was an important part of this research and took a seemingly inordinate amount of time, was very challenging, and some of the recommendations for further research, described later in this chapter, center around the process itself as well as who eventually became subjects. Recruiting could perhaps be likened to cold calling by a sales person, trying to convince people to, in this case, contribute some valuable time for this research. While it became more systematic with practice, the call and email protocols were strictly followed. The only way that perhaps this process may have been able to go faster, would have been to spend more time at it each day.

**Planner type.** Segregating the list of potential subjects by only accepting association planners proved to be a wise decision. In recruiting participants the researcher originally called every name on the list in order, asking each person if they were an association or another type of planner. Soon the researcher found this could be determined by referencing the potential participant’s company or organization website. For some, however, it was unclear whether their work was with an association and thus discussions were necessary. Additionally, a number of those who actually participated had either been corporate planners in the past, or currently worked for a third-party planner and served both sectors. While not a feature of this research, comments made during recruitment or by those who had served both sectors support the initial idea that association and corporate planning is different in key aspects. The clearest example is
the element of budget. Associations depend on the willingness of the individual or the individual’s company to elect to spend money and commit time to attendance, whereas corporate planners mandate attendance and budget. Corporate planners don’t have to worry about will they come? With budget emerging as one of the most important elements identified in this study, segregation of these two common types of planners and limiting this study to only one type, is thus supported as a pertinent condition delimiting target subjects.

**Job titles.** Job titles among the participants in this study did not, as expected, describe job level. In common practice, the job titles of manager, director, and vice president are generally assumed to represent a hierarchy where the manager is a lower position to a director, and director is a subordinate position to a vice president. When job duties and direct-reports as identifiers were compared against job titles among the participants in this study, there were instances where a manager had much higher level duties and perhaps more direct reports than a vice president. The conclusion is that job titles in this study did not generally imply a hierarchy of function, management or leadership.

**Purpose of the semantic differential survey.** The utilization of the semantic differential survey provided the hoped-for focusing of thought and thus preparation of subjects prior to the actual focus group discussion. Distributed a few days before the scheduled focus group, it seemed to provide a successful means of stimulating thinking. There was no apparent direct connection between a phrase in the semantic differential and the findings of a particular element as no participant referred directly to it in naming elements. This suggests that the semantic differential was useful to stimulate thinking but did not contribute directly to the naming of a particular element and thus, in itself, prejudice findings by suggestion. The semantic differential items were generated from the literature as noted in Appendix C: Semantic Differential.
Adult education practice. Good adult and continuing education practice was found to represent a rather minor direct mention in this research’s findings. However, the element of goals & objectives to drive the continuing professional education conference was one of the three most important single elements identified in this research. Goals & objectives, considering them a part of the adult education literature, has found a home in CPE conferencing and is part of the common language of planners. The concept of andragogy was not mentioned once by any participant. However, engagement is a part of an andragogical approach to adult education and thus this element is related, in the same fashion as goals & objectives are related, to adult education literature. Thus while adult education practice insights can be found among the research findings, the element directly referencing adult education practice was not one of the stronger elements identified.

Engagement. Continuing from the above topic, an adult education professional would expect the element of engagement to mean learning engagement, either as formal or informal learning. However, as it surfaced in this research, engagement represents several different but related concepts, suggesting that the explanation of what is meant by engagement be carefully described and supported. Let us start with the association literature to form a prior research basis for how engagement is perceived from an association organizational context.

Engagement is referenced in the association literature. It is literally one of The 7 Measures of Success identified by the book of the same name. In that reference, it is termed, “dialog and engagement” (ASAE & The Center for Association Leadership, 2006, p. 2). We must remember that the 7 Measures study was looking at organizational and thus staff characteristics. Their definition describes dialog and engagement as characterized by “a close-knit, consistent culture where all employees not only receive the same script…but also see the potential to contribute to a blockbuster production”
Engagement as found in this research is related to both the adult education perspective and the association perspective.

A careful analysis utilizing the data-driven approach suggested by Boyatzis (1998) was conducted regarding the concept of engagement. To uncover the similarities and differences around the notion of engagement a search on all transcripts was completed focusing on two words, engage (so that all forms were captured) and network which is a related action term used by the participants. In this search the word network was found three-to-one over engagement. Codes, grounded in participants’ words, were developed to describe the different perspectives in usage as their words were recorded in the transcripts. Part of this effort was simply to clarify some industry jargon. The issues of networking and engagement are intertwined and closely related. Very simply put, networking is a tool to achieve engagement, but different types of engagement were identified.

The word engagement was used in a variety of ways and coded into the following categories and the number of times the concept was discussed is noted. These were networking (11 discussions), engagement with content including learning from others as well as speakers (5 discussions), balancing the program between content and networking (6 discussions), and engagement with the organization (4 discussions).

The use of new technology tools such as social media was frequently mentioned since they offer new ways of both networking and engaging.

Perhaps the following quotes may provide an insight on these ideas. Faye described the need to create balance between education and networking, calling it “more white space” indicating that program design now had to include literally more time for participants to check their voice and emails, paying attention to the work at the office that did not stop just because they were at a conference. She indicated that by providing
more “white space” participants may stay engaged with education, trusting that they would have time for business imperatives. Elinore explained a bit differently,

We’ve taken out some of our educational content and shortened the lengths of the keynotes and topics and brought some down to half an hour including Q&A to keep their attention to allow for a few more and longer breaks and instead of jam packing their day. We’ve recognized that’s really not what they want. They want more networking time. They’ll stay more engaged mentally [with education] if we give them time during the day where they know that they can catch up on the office work, emails, so they know they have a break. They’ll be more focused during the time we have them [in sessions] as opposed to scattered and only half there.

Thus, engagement had to do with networking as the most important perspective, but also engagement in the sense that attendees would pay attention to education and not be distracted with other realities of their work lives. Engagement with the organization as an organization, also surfaced. What did not surface was any insight into understanding the learning that took place as a result of engagement. Circling back to adult education perspectives, this suggests that there is opportunity for research in this arena. A recent study on constructing knowledge in conference contexts has begun this work, especially in the context of informal learning (Haley, Wiessner, & Robinson, 2009). Their New Learning research agenda includes insight into effective practices, roles, time for reflection in these learning situations, leadership and technology. Their research yielded the following result, “Data analysis revealed five different forms of engagement with conference content: No Response, Acknowledgement, Contemplation, Reaction, or Leap to a New Idea” (2009, p. 77). We must remember that the data for the Haley, Wiessner and Robinson study was collected from learner/participants whereas
the data collected in my study was from those who plan the overall conference with a focus on what they identify as important elements within that planning. It is thus not a surprise that we cannot compare the two, yet when placed against each other, both provide insight into the similarities and differences in the notion of engagement. This also provides insight into the two, not opposing, but clearly different approaches to engagement of the adult educator and the conference planner.

**Technology.** Specific elements including concern over the use of social media, changing patterns of engagement such as people both listening to a speaker while reading their email on a smart phone, and distribution of program details on those same smart phones, may be due to current technological advances. Thus the placement in time of this research is likely a pertinent condition to interpreting the findings. If 10 years from now technology has changed as we might expect based on current trends, these elements may no longer be pertinent and/or others may have taken their place. Change was a theme that emerged, though not an element in itself. As Brager and Holloway (1978) remind us, technological changes are part of organizational change and if changes become permanent, they have even greater impact. One wonders at the impact an ever increasing rate of technological change may have on CPE practice.

**Summary.** Since the review of the literature, and indeed the problem statement specifically made the case that CPE impacts people and is big business, it is very important to note that the coding, sorting, compiling and analysis of 181 original elements eventually emerged as three overarching categories with two of them logically falling into people-related and business related groupings. The literature is thus strongly supported in this finding.

More than half or 14 of the 23 elements emerging in this study are generally supported in the literature, and nine new elements not in the literature emerged. Since almost all of the literature cited is based on theoretical models, some of which were
based on the author’s personal practice, it is not surprising that when asking practitioners what they actually do today, quite a long time after most of the literature was written, some new elements emerged. The target audience proved to be experienced though highly varied in practice and how they learned their craft. The actual research practice of conducting online focus groups through virtual meetings worked quite well and the ensuing discussions were lively and fruitful.

**Implications**

Participants in this study consistently referenced their membership associations as their leading sources for initial learning and continuing education in conference planning, but named on-the-job training as primary. On-the-job training and learning from associations is supported in the literature as described by the Bureau of Labor Statistics (2010-2011). Specific associations mentioned there included Meeting Professionals International (MPI) and the Professional Conference Management Association (PCMA). These organizations support and encourage study for the CMP (Certified Meeting Professional). Underlying MPI and PCMA among other organizations is the Convention Industry Council, the sponsor and legal entity for the CMP certification. Some of the most well-known books for study toward the CMP are Meetings and Conventions: A Planning Guide (McLaurin & Wykes, 2003), and Professional Meeting Management (Connell, Chatfield-Taylor, & Collins, 2002), as well as The Convention Industry Manual (Krug, 2000) which is the prime reference for the CMP exam. However, when one reads these manuals, they barely make reference to adult education practice with the exception of a chapter in Professional Meeting Management dedicated to the lifelong-learner, specifically citing the works of Malcolm Knowles (Connell, et al., 2002). This implies a clear need to better connect the field of adult and continuing education with the association meeting planning community.
During 2011, concurrent with data collection for this study, the Canadian Tourism Human Resource Council, working with the MPI Foundation, published *Meeting and Business Event Competency Standards (MBECS)* to,

…provide the meeting and business event industry with a comprehensive description of the competencies required of industry professionals. Such a repository of performance and knowledge standards is essential to clearly outlining what is required for success at all levels in this diverse industry,” (Canadian Tourism Human Resource Council, 2011, pp. 6-7).

By its title, this document, created and reviewed by leaders and practitioners worldwide, provides new practice data to the overall industry and represents an important new resource. The chapter content headings include: strategic planning, project management, risk management, financial management, administration, human resources, stakeholder management, meeting or event design, site management, marketing, professionalism, and communication. Some of these suggest congruence with the findings of this study. While outside of the scope of this project, the *MBECS* has obvious importance to continued study in this field and it is critical to reference this new study in this report. The creation of this report, in and of itself, documents the interest of a collaboration of related meeting planning organizations in further research to build knowledge in this field of practice. This implies that there may be a growing interest in this arena for future research, and perhaps collaborative research focusing on adult education could be suggested.

Meeting planning requires a great number of elements in the project plan. These were portrayed as strategic elements and logistical elements. Goals & objectives are an example of strategic elements whereas room sets are an example of logistical elements. While there are many of both types of elements, it was hoped that the results of this study would be balanced between these two types. This was accomplished as the
overall discussions stayed rather strategic. This may be attributed to the use of the semantic differential survey which helped set a strategic tone. The questioning route questions were open-ended and did not suggest a strategic or logistical perspective. The researcher was both surprised and pleased that a relative balance was maintained. Meeting planning can often get mired in myriad details. This implies that experienced association meeting planners can be both strategic as well as logistical.

The introductory question concerning what each participant liked best, designed to create a comfortable atmosphere to underlie the more important questions regarding elements, seemed to accomplish that goal. Additionally, it was very interesting and provided an insight into why participants chose this line of work. This implies that there may perhaps be personality traits that underlie the successful association meeting professional or perhaps personal characteristics necessary to become a successful one.

Applying a rating of one, two, or three to a list created by naming the most important elements in the first place, was challenging to every group. However, the discussions during the rating process proved enlightening. Those elements on which there was agreement had little if any discussion. For instance, a participant would say, “one” and there would be no discussion when probed. This provided strength to the naming of that element as a “one or most important.” Some elements had considerable discussion during the rating process which provided insight into the element itself. Some element ratings could not reach consensus and those elements were rated differently for reasons such as caused by varying educational needs of the association target audience. One clear example is the case where CEUs are only important and relevant if the association members need them. Another interesting discussion centered on contingency where the need was recognized, but an underlying belief (or perhaps wish) that crises would not happen seemed to impact the rating. Most elements were rated
one, some were rated two, and fewer yet were rated three. The implication is that indeed some elements are more important than others.

The finding of two overarching elements in association meeting planning, with a third connected to each of them, may be helpful to association meeting planners as they plan their overall strategy in approach to a conference project. It may present a fresh way to envision the work and balance it, or perhaps suggest a way to assign portions of the project plan to direct-reports. This finding has implication for practice.

Technological advances may create additional challenges and perhaps even new elements in the future. It, and the concentration on change, implies that this research could be replicated to identify new elements as they arise over time.

A constructivist approach in search of theory, grounded in practice, and through focus group research proved to be a rich pathway to identify one model of practice among the association meeting planners who participated in this study. From analysis of the discussions, from answers to the research questions, from a comparison of findings with the literature, we see emerge a snapshot to describe the key elements which the practicing, accredited, association meeting planners utilized. This implies that this research project met its intended goal.

**Recommendations for Further Research**

Many ideas surfaced when analyzing the data. Suggestions for potential further inquiry are listed below along with new questions that the findings suggest.

- Are there any additional elements that would have emerged if more focus groups had been conducted?
- Utilize the findings of this study to create a quantitative study and administer it to a much wider group of association meeting planners. Such a study could be used to verify these findings as well as seek additional elements through open-ended
items. The findings from a qualitative study offer the potential advantage of generalizability.

- Consider more work on the notion of engagement interlacing the adult education perspectives regarding learning with the association perspectives of networking, learning, and organizational connection with its members.

- Study the sources of adult education and related meeting planning information utilized by association and/or other types of meeting professionals. Utilize the ‘bookstores’ of the key meetings associations to identify the current practice literature to identify gaps and suggest ways to fill those gaps. Could the adult education literature more fully contribute?

- If learning in this field is supported by various membership associations, how do their publications and research projects influence practice?

- The Bureau of Labor Statistics (2010-2011) information listing types of backgrounds and training common to meeting and event planning does not list professionals in adult and continuing education. This may be an area for future policy action designed to work toward invigorating the field of meeting and event planning with professionals with a background in adult and continuing education.

- Identify and define the key differentiators between corporate and association planning.

- Conduct a similar study with corporate planners to identify their elements and then compare the findings of that study with the findings of this one. This could apply to other types of planners as well. Research could address understanding the role of various types of planners, if they have any special needs, and how this research’s findings compares with their practice.
• Conduct a study into why association meeting professionals select this field of work. Identify common expertise or professional traits among them.

• Conduct case study research around successful contingency planning. The suspicion is that this is a challenging element about which, at least the meeting planners in this study, seemed to be aware, but inexperienced. Seek successful practice and initiate educational programs on best practices around this challenging planning element.

• Compare the findings of this study with the new Meeting and Business Event Competency Standards, or MBCES (Canadian Tourism Human Resource Council, 2011). Investigate where differences may exist within these standards for association type planners.

• It would have been interesting to ask how the semantic differential impacted participants’ thinking and participation in the discussion. If this technique is used again, perhaps ask this question one day after the focus group takes place.

• There is simply no systematic reporting, no picture of the depth, breadth, and scope of CPE. Develop a list of key indicators that could provide the insight into this vast education enterprise so that it can be understood, challenges identified, and education programs designed to meet those challenges.

• The May (1998) and Wills (2001) studies involved interviews with people serving a variety of roles in association conference planning, and this study only addressed a single meeting professional. Though meeting professionals certainly represent a key staff role in association meeting planning, the literature clearly addresses the power, interests, and inter-role dynamics of various groups (Cervero & Wilson, 1996, 1998, 2006). This suggests that to fully understand association CPE, investigation into the provision of education or association
mission-driven CPE is complex and could better understood if all staff involved in supporting this function – and member volunteers who are similarly involved – be asked about their roles and perspectives.

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

Securing the Subject Pool from Meeting Professionals International.

1) Send request for support to Meeting Professionals International, a professional organization of which the researcher has been a member since 1995 and to which the PI already has access to most Members online (some Members hide their contact information). Discuss the request for letter of support with key staff at Meeting Professionals International.

2) Confirm with the President or CEO or organization designee how consent with subjects will be approached; assure maintenance of confidentiality.
   a) Discuss the online nature of the interviews which will require a headset and access to GoToMeeting. Reaffirm that the focus groups will be recorded.

3) Offer the executive summary, or final dissertation copy (electronic) and make a note of the request.

Focus Group Subject Protocol.

1) Create the subject pool according to the delimiters noted.

2) Run a random numbers program and approach subjects according to this.

3) Approach each subject individually according to random number assigned. Approach by email and/or phone call or both in any order.
   a) Describe focus group purpose and ultimate goal.
   b) Collect demographic data on the potential subject, verifying their suitability to participate.
   c) Describe the medium: Voice over Internet Protocol (VOIP) with telephone backup option, featuring document sharing, and the need to record the session. Investigate or test the accessibility of the internet access on the computer which the participant will use. Arrange to provide equipment (headset with microphone) that may be
Appendix A: Protocols (Continued)

needed. Explain that the provision of a high quality headset may be kept as a ‘thank you’ gift and incentive.

d) Explain that the format includes a short survey, followed by a one-hour focus group.
i) Initial phone call: 10-15 minutes
ii) Test equipment: 10-30 minutes
iii) Initial survey: 10 minutes
iv) Focus group: log on early (10) actual call (60 minutes)
e) Answer questions about confidentiality and obtain verbal consent; answer any questions.

4) Schedule the focus group at the convenience of the subjects using an online scheduling tool to find a mutually agreeable time.

5) Remind the focus group subject three days, and one day ahead of time by email and/or phone.

6) Conduct the Focus Group

7) Call for clarification as needed.

8) Send follow up survey if the research suggests it.

9) Send thank you note (email) and update the participant as to the current timeline of the project.
Appendix B: Focus Group Questioning Route

Background: Demographics [collected ahead of time]

- Name
- Job Title
- Years in this and similar position(s)
- Brief description of role and experience as a meeting planner
- Brief description of the conferences you plan
- Any training you may have in adult education

Introduction and Ground Rules: [PPT of the key points will show on the web meeting screen] – 5 minutes

- Welcome and thank you for agreeing to participate today!
- Thank each of you for completing the emailed survey and returning it to me.
- If for some reason you become disconnected, please call [redacted], which is my cell phone.
- Please let me know if you need to unexpectedly leave our discussion.
- Our time together is 60 minutes and I promise to promptly adjourn. I hope that you will please stay with us for the whole time.
- Our conversation is being recorded and we are online with a web-meeting, but no names will be associated with any report. I am interested in your collective ideas.
- You should have received the questions ahead of time and we will read them on the screen. There are only a few for our discussion today.
- Not everyone will have something to say for every question, but I don’t want to leave anyone out. If you have an opinion that has not been expressed, please share it. I may call on you if there is an important question and I have not yet heard from you.
Appendix B: Focus Group Questioning Route (Continued)

- Our goal is to be open with our ideas rather than to judge the quality of any one idea.
- Since we do not know each other, it would be helpful if you would give your name before you begin to speak. For example, “This is Ginger” and then make your comment.
- First names will make it pleasant. Let’s take a moment to get acquainted and I will call the roll. Please….

Opening Questions [live] – 5 minutes

- Tell us who you are, briefly describe your role in planning one or more conferences for your association, and name one thing you like most about [working or volunteering] in conferences.
- Can you very briefly describe the conference(s) you help plan each year?

Questioning Route: [live]

1. Planning a conference requires thinking about many things, let’s call them planning elements. I would like us to make a list of all of the elements you consider or discuss assuming your goal is to create the best continuing professional adult education conference possible. – 20 minutes

2. Would you add any other elements if planning a new conference rather than an annual or repeat one? – 5 minutes

3. Ways to probe: -- 5 minutes
   - Sometimes there are planning elements that are especially challenging?
   - Are there elements that you or your association are considering adding?
   - Likewise, are there any planning elements that you used to do that you no longer do?
Appendix B: Focus Group Questioning Route (Continued)

- Other probing around the findings from the survey, if warranted.

4. I have been taking notes on the elements you have listed. I am going to show them to you on the screen now and I would like you to take a minute to look these over. Please let me know if you would like to make any changes or additions to the list. [round robin by name if not everyone responds] – 5 minutes

5. [Show on screen the list generated during discussion and recorded on a second monitor not visible during the discussion.] Can we organize these into three categories? Most important, moderately important, least important? – 10 minutes

6. Thinking about our discussion today, is there anything that was left out that you would like to add? – 5 minutes

7. [round robin] Of all the things that we talked about today, what do you believe was the most important thing that was said about planning the most successful CPE conference possible? – 7 minutes

Conclusion: [1 minute]

- Thank you very much for your time today.
- If I mailed you a headset, please keep it.
- The next step is for me to transcribe our conversation and begin the analysis of the data. I may need to call you for a clarification of something you said.
- I will follow up with a written thank you, at which time you can let me know if you would like an emailed copy of the executive summary of the dissertation, or even a full copy when it is complete.
- Session is concluded and focus group members log off or are logged off. The recording continues as the Moderator and Co-Moderator review each question and discuss any important noteworthy
## Appendix Table C: Semantic Differential

<table>
<thead>
<tr>
<th>Directly related</th>
<th>Closely related</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

All columns except the last related to the Caffarella Interactive Model of Program Planning (2002, pp. 21-24). The last column is related to the 7 Measures Findings (ASAE and The Center for Association Leadership, 2006).

<table>
<thead>
<tr>
<th>We follow an articulated program planning process</th>
<th>We do not follow a specific program planning process</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Our planning process focuses on practical matters</td>
<td>Our planning process focuses on strategic matters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Our program planning process is very stable and has not changed much from year to year</td>
<td>Our program planning process continually is evolving</td>
<td></td>
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</tr>
<tr>
<td>Our program planning process is very open</td>
<td>Our program planning process is a closed system</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Our program planning process involves many people</td>
<td>Our program planning involves a few people</td>
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</tr>
</tbody>
</table>
### Appendix Table C: Semantic Differential (Continued)

<table>
<thead>
<tr>
<th>Directly related</th>
<th>Closely related</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone is equal when making decisions</td>
<td>Some people’s opinions matter more</td>
<td></td>
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</tr>
<tr>
<td>Program decisions are mission driven and if the program does not conform to mission, we don’t do it</td>
<td>Mission is not a decision driver in our CPE program</td>
<td></td>
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</tr>
<tr>
<td>Decisions based on member ideas</td>
<td>Decisions based on staff ideas</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Decisions based on making a profit</td>
<td>Making a profit is NOT important when making program decisions</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Decisions serve all members</td>
<td>Decisions serve some members</td>
<td></td>
<td></td>
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<tr>
<td>Decisions serve long-time members</td>
<td>Decisions serve newer members</td>
<td></td>
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</tr>
<tr>
<td>I have a clear understanding of who are core members are</td>
<td>I have little understanding of who make up the core of our membership</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Decisions serve the core members</td>
<td>Decisions serve specific groups of members</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Dialogue and engagement describe our program decision-making</td>
<td>Decision-making tends to be made by one person</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

253
Appendix Table C: Semantic Differential (Continued)

<table>
<thead>
<tr>
<th>Directly related</th>
<th>Closely related</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program decision-makers pay careful attention to clearly defining program objectives</td>
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<tr>
<td>Program objectives are not well defined</td>
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<tr>
<td>Program decision-makers recommend varying formats to engage adult learners</td>
<td></td>
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</tr>
<tr>
<td>Program decision-makers spend little time thinking about how the program should be designed to get the best transfer of learning for adults</td>
<td></td>
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<tr>
<td>Program decisions are made in order to satisfy vocal members</td>
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<tr>
<td>Program decisions are not based on satisfying vocal members</td>
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<tr>
<td>We assess our members’ needs on a regular basis</td>
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<tr>
<td>We rarely ask our members about their educational needs</td>
<td></td>
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<tr>
<td>We carefully use data we collect on our members’ needs</td>
<td></td>
<td></td>
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<tr>
<td>We have data but we don’t use it effectively</td>
<td></td>
<td></td>
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<tr>
<td>Staff have formal training in adult education</td>
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<tr>
<td>Staff have little or no formal training in adult education</td>
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<tr>
<td>I had training or thorough orientation to my role in CPE</td>
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<tr>
<td>I had little or no formal training for my role in CPE program planning in this</td>
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</tr>
<tr>
<td>Directly related</td>
<td>Closely related</td>
<td>1</td>
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</tr>
<tr>
<td>program planning in this association</td>
<td>association</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>We always evaluate our programs</td>
<td>We seldom or never evaluate our programs</td>
<td></td>
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</tr>
<tr>
<td>Program evaluations are fully mined and used for program improvement</td>
<td>We evaluate but do not use the data for program improvement effectively</td>
<td></td>
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</tr>
<tr>
<td>Data-driven strategies drive our CPE program</td>
<td>We seldom use data to drive our program decision-making</td>
<td></td>
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</tr>
<tr>
<td>Our CPE program has a customer or member service-type culture</td>
<td>You would not describe our CPE program as member-service oriented</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Our association CEO is highly engaged in our program planning</td>
<td>Our association CEO is not very involved in our program planning</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Our association Board of Directors is highly engaged in our program planning</td>
<td>Our association Board of Directors is not very involved in our program planning</td>
<td></td>
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<tr>
<td>Our association routinely collaborates and partners with other associations</td>
<td>Our association very seldom collaborates or partners.</td>
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</tr>
</tbody>
</table>

Appendix Table C: Semantic Differential (Continued)
### Appendix Table C: Semantic Differential (Continued)

<table>
<thead>
<tr>
<th>Avoiding embarrassment is important when making program decisions</th>
<th>Avoiding embarrassment is not a major concern</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoiding conflict is important when making program decisions</td>
<td>Avoiding conflicts is not a major concern when making program decisions</td>
</tr>
<tr>
<td>Avoiding mistakes is important when making program decisions</td>
<td>Avoiding mistakes is not a major concern</td>
</tr>
<tr>
<td>A deliberate effort is made to use innovative technology</td>
<td>No deliberate effort to use innovative technology</td>
</tr>
<tr>
<td>A deliberate effort is made to meet the concerns of the association president</td>
<td>No deliberate effort made to meet concerns of the association president</td>
</tr>
<tr>
<td>A deliberate effort is made to meet the concerns of the association board</td>
<td>No deliberate effort made to meet concerns of association board</td>
</tr>
<tr>
<td>We have clear definition of successful CPE program</td>
<td>We do not have a clear definition of a successful program</td>
</tr>
<tr>
<td>We agree on what a successful program is</td>
<td>Little agreement on what makes successful program</td>
</tr>
</tbody>
</table>
Appendix D: Power Point

Reminders for Researcher Only

- Two hours before, send email reminder of both focus group – and – to only log in with first name (omit last name and email address)
- Turn my cell phone to silent
- Turn Skype to Do Not Disturb
- Lock dogs in crates so no barking
- When joining and right before beginning recording, advise on:
  - Microphone boom position
  - Set their phones to silent
  - How to mute if loud noise or interruption
  - Please don’t multi-task

Focus group

Welcome and thank you for participating!
Appendix D: Power Point (Continued)

I have already spoken with each of you about:

- **Turn on Recording**
- Purpose of this project
- Your:
  - Job
  - Years in this position and in the industry
  - Your Meeting Planning know-how
  - Described your role and experience
  - Tested the headset and link

Welcome!

- 727-510-9116 for trouble
- Please stay the hour
- Recording and being Transcribed
- Thanks for completing the survey and returning to me
- Questions were sent to you ahead of time
- Please don’t multi-task
How we can work together

FIRST NAMES

Get to know each other

FIRST NAME

Role in Conference Planning

One thing you like most

Describe Conference
| Planning a conference requires thinking about many things, let’s call them planning elements. I would like us to make a list of all of the elements you consider or discuss assuming your goal is to create the best continuing professional adult education conference possible. |
| Would you add any other elements if planning a new conference rather than an annual or repeat one? |
Especially challenging Elements

- Are you considering adding any?
- Used to do, but no longer do?

I have been taking notes on the elements you have listed. I am going to show them to you on the screen now and I would like you to take a minute to look these over. Please let me know if you would like to make any changes or additions to the list.
Can we organize these into three categories?

◦ Most important = 1
◦ Moderately important = 2
◦ Least important? = 3

Thinking about our discussion today, is there anything that was left out that you would like to add?
Of all the things that we talked about today, what do you believe was the most important thing that was said about planning the most successful CPE conference possible?

Next Steps
- Thanks!
- You may keep the headset
- Transcribe
- Possibly call you for a clarification
- Results – a copy?
Appendix E: Initial Phone Call Script

- Hello, I am Ginger Phillips a fellow MPI Planner Member from the Tampa Bay Chapter. I got your name and contact information from the MPI Directory.
  - I need your help
  - Do you have two minutes for this quick phone call?
- As a 20-year meeting planner, I am also finishing a degree at the University of South Florida and working on my thesis which has to do with what Meeting Planners actually do when they plan meetings.
- The study has been approved and I am approaching you to be a subject in this research:
  - DO YOU PLAN ASSOCIATION TYPE MEETINGS OF AT LEAST 250 PARTICIPANTS?
    - Yes, continue
    - No, thanks, but you do not fit this last bit of my profile for subjects
  - Participants in the pilot found it fun and a rare chance to talk openly and confidentially with professionals like us who face similar challenges in our business
  - You will be asked to take one written survey and participate in single a one-hour online focus group scheduled to be convenient for you
  - I will provide you with a headset ($30 value) for use during the focus group which you may keep and use in your work
- There is lots of advice on how to plan a successful conference, but scarcely any actual research to see what people, like you and I, actually do in practice.
- How can we improve practice if we don’t have data?
- I hope that you will agree to participate.
Appendix E: Initial Phone Call Script (Continued)

- May I send you this information in an email? Then I will call back to discuss any questions you may have and get an address to which to send the headset, as well as some basic demographic data.

- I hope that you will read the email and agree to participate.

- Thanks very much for your time and consideration.
Appendix F: Approach Email

From: Ginger Phillips <gingerfl@tampabay.rr.com>
Sent: Monday, July 11, 2011 4:56 PM
To: planner0319@gmail.com
Subject: Requesting help from MPI Planners (385)
Attachments: Informed Consent to Participate in Research Final to Email.docx

Dear Fellow MPI Planner:

I hope that you will be able to help me. I just left a short VM and this is the promised follow-up email.

I am a fellow MPI Planner Member and obtained your name and contact information from the MPI Directory. Planners like you and I spend enormous amounts of time and resources planning conferences. Are there ways to make planning more efficient, focused, and, in the end, provide a better Return on Investment?

As part of a University of South Florida study, here is a chance for you to talk with a small group of people from other organizations about what goes into planning successful conferences. The study is designed to be convenient (you don’t need to leave your desk) and efficient (it won’t take much time). Participants in the pilot said it was fun and provided a rare chance to discuss conference planning openly and confidentially with people from other organizations who face similar challenges.

I am inviting you to participate in this project. The research focuses on the way that conferences are developed and not on content. If you agree to participate and need one, I will send you a $30 microphone headset necessary for the online discussion, which you may keep.

The study will take a short amount of your time and will be conducted in small online focus groups. Your focus group will be scheduled at a convenient time and can take place from anywhere you have a computer that can access the internet.

Will you please agree to participate? Do you have a few minutes to speak with me about this project? If so, please send me the best time and number to call.

Thank you very much,

Ginger Phillips, Doctoral Candidate researching Professional Meeting Planning
MPI Member
Appendix G: Scheduling Email

The link led to the following online tool for communicating available dates.
Appendix H: Focus Group Outlook Invitation

1. Please join my meeting.
   https://www2.gotomeeting.com/join/605322898

2. Use your headset is recommended.
   If you cannot get your headset to work, call in using your telephone using the information below.
   Dial +1 (714) 551-0020
   Access Code: 605-322-898
   Audio PIN: Shown after joining the meeting

   Meeting ID: 605-322-898
   Ginger’s number in case of trouble: [REDACTED]
   GoToMeeting®
   Online Meetings Made Easy™
## Appendix I: Planning Elements Spreadsheet

<table>
<thead>
<tr>
<th>Main</th>
<th>Dissert</th>
<th>Focus Group E</th>
<th>Primary</th>
<th>Secondary</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Who are the stakeholders and what does the organization / attendees want to get out of it?</td>
<td>Needs assessment</td>
<td>Purpose</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- What does the group need, what is their purpose?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1</td>
<td>Goal is first</td>
<td>Goals, Objectives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Budget - what do I have to work with</td>
<td>Budget</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Setting the project plan, vision, how much time you have to plan the event</td>
<td>Vision</td>
<td></td>
<td></td>
<td>Change</td>
</tr>
<tr>
<td>1</td>
<td>Adapting peoples behaviors - finding the right mix of what will draw them now</td>
<td>Program design</td>
<td></td>
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<tr>
<td>expectations changing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>How much time you have to work with</td>
<td>Time</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td>Timeline</td>
<td>Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Logistics</td>
<td>Logistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>What is the attendees experience and what do they need to get them to come</td>
<td>Needs assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Wow factor, to get them coming again</td>
<td>Program Design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>What marketing and communications tools are needed</td>
<td>Marketing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Housing, pattern, room quality, rates that will appeal</td>
<td>Venue</td>
<td>Hotel rate</td>
<td>Logistics</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Speakers, presenters, faculty, keynoters -- and recruiting</td>
<td>Speakers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Developing the content and committees (should come from goals)</td>
<td>Content</td>
<td>Committees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Site selection</td>
<td>Site</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3</td>
<td>What are the other things? Social events, are they bringing their families</td>
<td>Social events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Balance of networking, education, trade show - how are all involved</td>
<td>Program design</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2</td>
<td>How to prove ROI</td>
<td>ROI</td>
<td></td>
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<tr>
<td>3</td>
<td>Help potential attendees make the case to the people who are authorizing travel</td>
<td>Marketing</td>
<td></td>
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<tr>
<td>3</td>
<td>CEUs - attraction and management</td>
<td>Accreditation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>All Face2face, virtual component? Internet and video support - Involve apps, mobile devices, incorporating in marketing and onsite</td>
<td>Format</td>
<td>Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Extend life of onsite experience - Networking before and after - getting conversations going</td>
<td>Extend life</td>
<td>Networking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Member value</td>
<td>Member value</td>
<td></td>
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<tr>
<td>2</td>
<td>Relationship with exhibitors and sponsors</td>
<td>Exhibitors, Sponsors</td>
<td></td>
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<tr>
<td></td>
<td>International travelers: who will come, will they stay, what is best venue, figure out how to request from CVB to find appropriate venue</td>
<td>International</td>
<td></td>
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<td>2</td>
<td>Day pattern</td>
<td>Program</td>
<td></td>
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<tr>
<td>1</td>
<td>Budget and price points</td>
<td>Budget</td>
<td></td>
<td></td>
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<tr>
<td>1</td>
<td>Research much more intense for a new event</td>
<td>Research</td>
<td>Vision, Goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Room block: how many will be attending on what days, when and why - Day pattern - getting shorter/fewer days, how many weekend days to include (room block)</td>
<td>Room block</td>
<td>Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Reinventing event from one year to another</td>
<td>Program design</td>
<td>Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Content - speakers more important with new events</td>
<td>Content</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Competition from other events not just direct competitors, but others in the city at the same time, weather</td>
<td>Competition</td>
<td>Obstacles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>What is relevant to our attendees, especially in terms of our competing conferences, the attendee experience</td>
<td>Relevance</td>
<td>Competition Contingency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Staying on top of new tools that are available and use them - Mobile, ARS, etc. usage, integration</td>
<td>Enrich the attendee experience</td>
<td>Technology</td>
<td>Change</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Elevate exhibitor experience - innovative networking instead of Pipe and Drape trade show</td>
<td>Exhibitors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Moving away from large plenary events, entertainment, to more interaction, topical - Time investment is evolving, large sit-down events going away - More interactive - adult education, more attendee-driven content, table topics, more interpersonal connections - Content - shortened, to keep attention, leading to longer breaks - Time - don't fully pack the day and they will stay more engaged (longer breaks)</td>
<td>Program Interactive Adult Learning</td>
<td>Content Targeted networking</td>
<td>Change</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Spending reduced in line with economic downturn - perception so as not looking as if spending so much</td>
<td>Economy</td>
<td>F&amp;B</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix I: Planning Elements Spreadsheet (Continued)

<table>
<thead>
<tr>
<th></th>
<th>Adding Charity elements</th>
<th>Charity</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Sustainability - CSR plan</td>
<td>Sustainability/CSR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adding Charity elements</th>
<th>Charity</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Looking back, the only thing I would add is that while we discussed planning for an event in great detail, we didn't discuss follow-up. Often times what you learn from your attendees post-event (either via surveys or on-site comment/feedback mechanisms) are one of the most valuable tools you have when preparing for the next one.</td>
<td>Evaluation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adding Charity elements</th>
<th>Charity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2. It’s hard to pinpoint one [most important]. It was said several times, but I think knowing your audience and what they expect/need to get out of the event is the most important factor for planners to know and consider. It’s easy for us to get bogged down in the details and we must not lose sight of the strategic elements behind the event.</td>
<td>Audience Strategic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adding Charity elements</th>
<th>Charity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The most important thing to me- is know your audience and the goal of the meeting. This is so critical this day in age.</td>
<td>Audience Goal</td>
</tr>
</tbody>
</table>
Appendix J: Communication and Reminder Emails

Initial Reminder, delivery of survey and questions

From: Ginger Phillips <gingerfl@tampabay.rr.com>
Sent: Monday, August 22, 2011 1:51 PM
To: gingerfl@tampabay.rr.com
Cc: Dina Vann
Subject: Focus Group Info, Survey, Discussion Questions (H)
Attachments: Semantic Differential Word Docx.docx
Importance: High

Dear Focus Group Participants:

The purpose of this email is to prepare us for our call scheduled for Wednesday 24 August at 2:00 EDT. I have sent you an Outlook Invitation; it should be in your calendar.

Please do this now
Attached is a short survey that is intended to prepare you for our discussion. It is very important that you complete it and return it to me by close of business TOMORROW, Tuesday 23 August. It will not take you longer than 10 minutes. The directions indicate that you should answer thoughtfully, but quickly. Your first reaction is the best and there are no right or wrong answers. I also hope that you will find it interesting and thought-provoking.

Details, protocols, phone number, link
Please log on to the web meeting, with your headset on, about 10 minutes before the start time. I will be online and checking connectivity. In case of problems, please call my cell phone at [redacted]. We will start and end on time. I know that you are a volunteer and I thank you very much for participating, but hope that you will sincerely participate for the full time. Remember to only use your first name when you log on to GoToMeeting, and not your email address. When you identify yourself before speaking, say "This is [your first name]" before you begin to speak. Kindly sit in a quiet area, and please don't multi-task during the call. Your input is very valuable.

https://www2.gotomeeting.com/join/605322898

Our discussion questions

In an online focus group, we like to give you the questions we will be discussing so that you can think about them ahead of time:

1. Tell us who you are, briefly describe your role in planning one or more conferences for your association, and name one thing you like most about working in conferences.
2. Can you briefly describe the conference(s) you plan each year?
3. Planning a conference requires thinking about many things, let's call them planning elements. I would like us to make a list of all the elements you consider or discuss, assuming your goal is to create the best continuing professional adult education conference possible.

[1] Actual recipients were blind copied for confidentiality.
Appendix J: Communication and Reminder Emails (Continued)

4. Would you add any other elements if planning a new conference rather than an annual or repeat one?
   a. Sometimes there are planning elements that are especially challenging?
   b. Are there elements that you or your association you are considering adding?
   c. Likewise, are there any planning elements that you used to do that you no longer do?

5. I have been taking notes on the elements you have listed. I am going to show them to you on the screen now and I would like you to take a minute to look these over. Please let me know if you would like to make any changes or additions to the list.

6. Can we organize these into three categories? Most important, moderately important, least important?

7. Thinking about our discussion today, is there anything that was left out that you would like to add?

8. Of all the things that we talked about today, what do you believe was the most important thing that was said about planning the most successful CPE conference possible?

Thank you again and I look forward to “meeting” you at the focus group.

**Last Minute Reminder**

From: Ginger Phillips <gingerfl@tampabay.rr.com>
Sent: Wednesday, August 24, 2011 11:58 AM
To: gingerfl@tampabay.rr.com
Subject: Focus Group Soon

I am looking forward to speaking with you on the Focus Group in about an hour. Please remember, when you log in, only log in with your first name and omit your email address! Please log in 10 minutes early or at 1:50.

The link should be in your Outlook calendar, as well as in the email I sent on Monday, 8/22 at 1:51.

Thanks! Talk to you soon!
Appendix K: Informed Consent

Consent to Participate: IRB Study #1515

1. I have approached you to consider participating in a research study and sent you a document to review. I am in charge of this study and I am called the Principal Investigator and I am the only investigator working on this project though I work with a Doctoral Committee and a transcriptionist. This research is part of my requirements to earn a doctoral degree.

2. This document tells you about this study and at the end I will ask for questions and for your consent to participate. You are welcome to ask questions as we review this document. Reviewing this carefully is a requirement of the University.

3. The study is called: *What do Association Conference Planners consider the Most Important Elements for Continuing Professional Education Conference Planning?*

4. The research will be conducted primarily online using GoToMeeting where interviews will take place in real time over an internet platform using Voice Over Internet Protocol or VOIP. If you do not have a headset with microphone which is needed for this, one will be provided to you which you may keep. This research is being paid for by the principal investigator.

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

6. Study Procedures: If you take part in this study, you will be asked to:
   a. Meet with me over the phone for a short phone call to share information about the study with you, collect some very basic demographic information such as your name, job title, years working in this arena, and the like. You will be asked to commit to no more than two hours of time.
   b. You will be asked to complete at least one short survey which will be sent to you electronically and which you will answer and return as an electronic file.
   c. Participate in one focus group:
      1. The focus group will take place at a time convenient to all members of the group and at your work computer or at home, over an internet link. This will require that you download a very small ActiveX application on your computer.
      2. We will need to conduct an equipment test before we schedule the focus group to make sure that your or your company will allow the small add in to be installed on the computer.
computer you will use. You will need a USB headset with microphone as we will speak over the internet in what is called Voice Over Internet Protocol which you may have heard before called, VOIP. If you do not have a headset, I will provide one for you and you may keep it when we are done. It is a nice headset and the value is about $30.

3. The focus group is expected to take about 60 minutes.

4. The focus group will be recorded so that I am able to make the best and most accurate use of the information you have shared. I will ask you to please agree to the recording. The recording is for my use as a researcher alone, and will reside on my personal computer which I use for my studies and that of my transcriptionist until the transcript is finalized. I will also make backup copies to protect the work. I am the only one who will have permanent access to these recordings and will house them in my safe in my home for the five years required by the University. After that time, I will erase them. We will identify ourselves on GoToMeeting and speak with each other using first names only so that your personal identification is as protected as possible. You will be asked not to use your email address in the GoToMeeting sign-on so as not to identify yourself beyond your first name as your login name automatically appears when you are speaking.

7. Alternatives: You have the alternative to choose not to participate in this research study.

8. Benefits: We don’t know if you will get any personal benefits by taking part in this study, but your may request a summary report or a full electronic copy of the final dissertation.

9. Risks or Discomfort: This research is considered to be minimal risk. That means that the risks associated with this study are the same as what you face every day. There are no known additional risks to those who take part in this study.

10. Compensation: We will not pay you for the time you volunteer while being in this study. However, you may keep the headset and use it in any way that you wish.

11. Conflict of Interest Statement: The only potential conflict of interest is that the researcher is also a meeting planner similar to yourself and all planners participating in the focus group may learn from each other and may in fact, work for competing organizations. The purpose of the study is to gain knowledge about the conference planning elements. Trade secrets of individual organizations are not an anticipated subject of discussion.
Appendix K: Informed Consent (Continued)

12. Confidentiality: We must keep your study records as confidential as possible.
   a. Recordings will be stored for five years.
   b. Recordings will be used until the dissertation is complete, which is anticipated to be less than one year. However, the recordings may be consulted over the remaining years in preparation of presentations or articles based on the research.
   c. Recordings may be originally saved to my work computer, but will be stored on my personal computer during the active work on the dissertation and subsequently dropped to CD and stored in my personal safe at home.
   d. It is not anticipated that any other professionals will access the recordings or that they be used for subsequent research.
   e. However, certain people may need to see your study records. By law, anyone who looks at your records must keep them completely confidential. The only people who will be allowed to see these records are:
      1. The dissertation committee which are faculty members at the University.
      2. Certain government and university people who need to know more about the study. For example, individuals who provide oversight on this study may need to look at your records. This is done to make sure that we are doing the study in the right way. They also need to make sure that we are protecting your rights and your safety.) These include:
         • The University of South Florida Institutional Review Board (IRB) and the staff that work for the IRB. Other individuals who work for USF that provide other kinds of oversight may also need to look at your records.
         • Additionally the U.S. Department of Health and Human Services has the right to review all research records.
Appendix K: Informed Consent (Continued)

- We may publish what we learn from this study. If we do, we will not let anyone know your name. We will not publish anything else that would let people know who you are.

Voluntary Participation / Withdrawal

You should only take part in this study if you want to volunteer. You should not feel that there is any pressure to take part in the study, to please the investigator or the research staff. You are free to participate in this research or withdraw at any time. There will be no penalty or loss of benefits you are entitled to receive if you stop taking part in this study.

Questions, concerns, or complaints

If you have any questions, concerns or complaints about this study, call Virginia B. "Ginger" Phillips at 727-510-9116.

If you have questions about your rights as a participant in this study, general questions, or have complaints, concerns or issues you want to discuss with someone outside the research, call the Division of Research Integrity and Compliance of the University of South Florida at [redacted].

If you experience an unanticipated problem related to the research call Ginger Phillips, as above.

I have carefully explained:

- What the study is about.
- What procedures will be used.
- What the potential benefits might be.
- What the known risks might be.

Do you have any questions?

Do you agree to take part in this study?
Copyright Permissions

Figure 1: Adults Attending Education for Work-related Reasons
No permission needed. U. S. Government Data

Figure 2: Apps Provider Framework
Permission Granted October 31, 2011

Figure 3: Sork – Basic Elements
Permission Granted October 31, 2011

Figure 4: Sork – Three Domains
Permission Granted October 31, 2011

Figure 5: Caffarella’s Interactive Model of Program Planning
Permission Granted October 31, 2011

Figure 6: Pennington & Greene Model
Permission Granted October 12, 2011

Figure 7: Independent Variables Related to Organizational Innovativeness
Permission Granted October 17, 2011, with restrictions to no more than 20 actual copies of the dissertation to be printed.

Figure 8: Simlerly’s Strategic Planning Model
Permission Granted October 31, 2011

Figure 9: 7 Measures of Success ©
Permission Granted October 12, 2011, requiring copyright noted

Figure 10: Analytical or Axial Coding
Permission Granted October 31, 2011

Figure 11: Element Ratings
Original data from this study
About the Author

Virginia B. Phillips was born Virginia Arden Manos in Tallahassee, Florida. She earned a B.S. in Education from Mansfield State College in Mansfield, Pennsylvania, and a M.Ed. in Education from the Pennsylvania State University in University Park, Pennsylvania. She has taught secondary school, led a nonprofit organization, and has worked in the field of adult and continuing education conferencing for most of her professional career either at university or for associations. She owns her own continuing professional education company, Arden Solutions, serving the professional development needs of the association sector. She is active in Meeting Professionals International and has twice been named Meeting Professional of the Year by the Tampa Bay Chapter.