

Guide to Association and Meeting Industry Certifications



Introduction

This guide was developed for association and meeting professionals seeking a resource that can direct them to the right certification or certificate program based on years of experience, core skill set and career progression. Too often young and seasoned professionals spend hours searching various web sites and message boards trying to find the right program to show their commitment to the industry as well as their own desire to set themselves apart from their peers who do not pursue an industry certification or certificate program.

There are more than 30 certification and certificate programs maintained and administered by professional and trade associations. This guide is not comprehensive of all industry certifications or certificate programs, but will be updated regularly. The guide is designed to provide you, the association and meeting professional with a single source of information. Once you find the certification or certificate program that best meets your needs you will be directed to that sponsoring organization for more information about the process of applying and maintaining the certification or certificate.

An important process to start early is tracking your professional development activities toward your recertification requirements or for employment purposes. The Association and Meeting Professionals Advancement Portal powered by RecertTrack provide such a portal and was designed specifically for professionals in the association, convention, meeting, event and exhibition industry. You can access the portal at <http://www.recerttrack.com/assn-meetings>.

If you find errors or certification or certificate programs that are not housed in this Guide please contact the RecertTrack Team directly at 301-452-5846 or email us at suggestions@recerttrack.com. This is a free downloadable resource for the industry. At RecertTrack, we believe every association, convention, meeting, event and exhibition professional deserves access to information from a single source. We want to be that source for you.



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Important information and terms

A certification program is designed to test the knowledge, skills, and abilities required to perform a particular job, and, upon successfully passing a certification exam, to represent a declaration of a particular individual's professional competence. In some professions, certification is a requirement for employment or practice.

Similarly, licensure tests an individual's competence but is a mandatory process by which the government grants time-limited permission for that licensed individual to practice his or her profession.

In contrast to certification and licensure, an assessment-based certificate program is an educational or training program that is used to teach learning objectives and assess whether those objectives were achieved by the student.

Accreditation is the process by which a credentialing or educational program is evaluated against defined standards and is awarded recognition if it is in compliance with those standards.

The above information was inserted to educate you on the differences in the programs you seek and make you a better consumer at the same time.

A Special Thank You to our Supporters

The Guide to Association and Meeting Industry Certification by RecertTrack was supported by 5 primary organizations representing the meetings, travel, exhibitions and events industries in the U.S. and Internationally. Industry partners include CUT Communications, International Association of Exhibitions and Events, Barcelona Turisme Convention Bureau, Association Management International and customade Events.



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Certified Hotel Administrator (CHA) – American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHA designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require documented evidence of managerial experience and successful completion of a comprehensive examination.

- **Plan A Eligibility -- Education Emphasis**
 - At least a 2-year hospitality degree from an accredited institution or successful completion of the Educational Institute's Hospitality Management Diploma and current employment as a general manager, owner/operator, or corporate executive* (see below) in a lodging hospitality company, with at least two years of full-time experience in one or more such positions.

- **Plan B Eligibility -- Experience Emphasis**
 - Current employment as a general manager, owner/operator, or corporate executive* (see below) in a lodging hospitality company, with at least three years of full time experience in one or more such positions.
 - *Educators Only:* Currently teaching hospitality management courses on a full-time basis at an accredited academic institution; three years of experience in this capacity; three years of full-time experience in a management position in a lodging hospitality company.

- **Plan C Eligibility -- Early Entry**

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHA designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHA certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a hospitality degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*A corporate executive is defined as an individual, employed by a firm responsible for the operation of three or more properties, who serves as a regional or corporate director of operations, or has ultimate corporate responsibility for rooms, marketing, accounting and finance, food and beverage, human resources, or engineering.

Outside the United States and Canada

Outside the United States and Canada, Professional Certification programs are managed by the Educational Institute's Hospitality Education Partners (HEP) licensees. If you are working in one of the HEP countries, and are interested in pursuing Professional Certification, please contact them directly. [Click here for HEP](#) country list and contact information.

Certified Hotel Administrator (CHA) Body of Knowledge/Core Competencies

Candidates for the Certified Hotel Administrator (CHA) professional certification can quiz their readiness for the CHA exam with the new online CHA Assessment Tool available from the American Hotel & Lodging Educational Institute (EI).

The CHA Assessment is an online diagnostic tool to help assess areas of hospitality knowledge, and prepare candidates prior to taking the CHA exam. It will help you gauge your expertise in the knowledge and skills needed by today's general managers.

The CHA Assessment Tool consists of six 30-question quizzes that correlate to the six sections of the CHA study guide. These knowledge domains include:

- Financial Management
- Sales and Marketing
- Leadership Management
- Human Resources Management
- Rooms Management
- Food and Beverage Management

Each assessment is a short quiz that can be completed within a limited time period. After completion of the quiz, an evaluation report indicating your score and skill level against the required benchmark is generated and made available to you.

Each 30-question quiz targets a specific knowledge domain with questions similar in format and content to those contained on the CHA exam. The assessment also:

- provides valuable feedback including a review of missed items answered and a detailed performance report.
- provides instant feedback on incorrect answers.

- identifies where the information may be found in the study guide for further review.

After completion of the quiz, which contains questions similar in format and content to those in the CHA exam, candidates receive an evaluation report indicating their score and skill level against the required benchmarks. The assessment includes a detailed performance report and a review of missed questions. It also identifies where the correct information may be found in the CHA study guide for further review.

- 120 days of access to the diagnostic tool
- Three opportunities to practice each section
- Assessment report after each use

Certified Hotel Administrator (CHA) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 60 points within FIVE years of the CHA Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (18 points minimum/30 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/25 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/25 points maximum)

CATEGORY 4: Educational Service (no minimum/20 points maximum)

Certified Rooms Division Executive (CRDE) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CRDE designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution.

OR

Successful completion of the Educational Institute's five course [Rooms Division Management Specialization program](#).

AND

- Current full-time employment in a CRDE qualifying position* with at least one year of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CRDE qualifying position* with at least two years of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position* at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CRDE designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CRDE certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*Examples include: assistant general manager, resident manager, rooms division executive, senior assistant manager, executive assistant manager at a lodging hospitality company.

Certified Rooms Division Executive (CRDE) Body of Knowledge/Core Competencies

CRDE exam preparation material offers a thorough overview of the CRDE exam content, along with practice questions. Highlights include:

- Rooms Management
- Financial Management
- Motivation and Leadership
- Human Resources Management

Certified Rooms Division Executive (CRDE) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CRDE Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (15 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/20 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/20 points maximum)

CATEGORY 4: Educational Service (no minimum/15 points maximum)

Certified Hospitality Revenue Manager (CHRM) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHRM designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution **OR** successful completion of the Educational Institute's five course Management Specialization program.

AND

- Current full-time employment in a CHRM qualifying position* with at least six months of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CHRM qualifying position* with at least one year of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHRM designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHRM certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination **BEFORE** meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*Fifty percent or more of the duties and responsibilities involve revenue management, including forecasting, analyzing inventories, rates and occupancy. Manage input of data and report generation. Manage block activity and monitor property management system. Manage and supervise reservations.

Certified Hospitality Revenue Manager (CHRM) Body of Knowledge/Core Competencies

CHRM exam preparation material offers a thorough overview of the CHRM exam content, along with practice questions. Highlights include:

- The Lodging Industry
- Forecasting and Planning
- Strategies and Tactics
- Statistical Analysis
- E-Commerce and Online Distribution

Certified Hospitality Revenue Manager (CHRM) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 40 points within FIVE years of the CHRM Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (10 points minimum/20 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/15 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/15 points maximum)

CATEGORY 4: Educational Service (no minimum/10 points maximum)

Certified Food And Beverage Executive (CFBE) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the Certified Food and Beverage Executive (CFBE) designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require documented evidence of managerial experience and successful completion of a comprehensive examination.

- Plan A Eligibility -- Education Emphasis
 - At least a 2-year degree from an accredited institution or successful completion of the Educational Institute's five course [Food and Beverage Management Specialization program](#) and
 - Current full-time employment as an executive-level manager or food and beverage director in hotel food and beverage administration, general manager of a freestanding restaurant facility, or executive chef with at least one year experience in one or more such positions.

- Plan B Eligibility -- Experience Emphasis
 - Current full-time employment as an executive-level manager or food and beverage director in hotel food and beverage administration, general manager of a freestanding restaurant facility, or executive chef with at least two years' experience in one or more such positions.
 - Educators Only: Currently teaching food and beverage hospitality management courses on a full-time basis at an accredited academic institution, have one year experience in this capacity, and have one year of full-time experience in food and beverage management in a lodging hospitality company.

- Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a CFBE qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CFBE designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CFBE certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a hospitality degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

Outside the United States and Canada

Outside the United States and Canada, Professional Certification programs are managed by the Educational Institute's Hospitality Education Partners (HEP) licensees. If you are working in one of the HEP countries, and are interested in pursuing Professional Certification, please contact them directly.

[Click here for HEP](#) country list and contact information.

Certified Food & Beverage Executive (CFBE) Body of Knowledge/Core Competencies

Candidates for the Certified Food & Beverage Executive (CFBE) professional certification can test their readiness for the CFBE exam with the CFBE online Assessment Tool available from the [American Hotel & Lodging Educational Institute \(EI\)](#).

The CFBE Assessment Tool is an online diagnostic tool to help assess areas of hospitality knowledge, and prepare candidates prior to taking the CFBE exam. It will help you gauge your expertise in the knowledge and skills needed by today's food and beverage executives.

The CFBE Assessment Tool consists of six 20-question quizzes that correlate to the six sections of the CFBE study guide. These knowledge domains include:

- Managing Food Operations
- Managing Beverage Operations
- Marketing and Sales Management
- Financial Management
- Leadership
- Human Resources Management

Each assessment is a short quiz that can be completed within a limited time period. After completion of the quiz, an evaluation report indicating your score and skill level against the required benchmark is generated and made available to you.

Each 20-question quiz targets a specific knowledge domain with questions similar in format and content to those contained on the CFBE exam. The assessment also:

- provides valuable feedback including a review of missed items answered and a detailed performance report.
- provides instant feedback on incorrect answers.
- identifies where the information may be found in the study guide for further review.

After completion of the quiz, which contains questions similar in format and content to those in the CFBE exam, candidates receive an evaluation report indicating their score and skill level against the required benchmarks. The assessment includes a detailed performance report and a review of missed questions. It also identifies where the correct information may be found in the CFBE study guide for further review.

- 120 days of access to the diagnostic tool
- Three opportunities to practice each section
- Assessment report after each use

Certified Food & Beverage Executive (CFBE) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CFBE Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (15 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/20 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/20 points maximum)

CATEGORY 4: Educational Service (no minimum/15 points maximum)

Certified Hospitality Housekeeping Executive (CHHE) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHHE designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution **OR** successful completion of the Educational Institute's five course [Management Specialization program](#).

AND

- Current full-time employment in a CHHE qualifying position* with at least one year of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CHHE qualifying position* with at least two years of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHHE designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHHE certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination **BEFORE** meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*Examples include: executive housekeeper or director of housekeeping at a lodging hospitality company.

Certified Hospitality Housekeeping Executive (CHHE) Body of Knowledge/Core Competencies

CHHE exam preparation material offers a thorough overview of the CHHE exam content, along with practice questions. Highlights include:

- Housekeeping Operations
- Financial Management
- Leadership
- Human Resources Management

Certified Hospitality Housekeeping Executive (CHHE) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CHHE Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (15 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/20 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/20 points maximum)

CATEGORY 4: Educational Service (no minimum/15 points maximum)

Certified Hospitality Facilities Executive (CHFE) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHFE designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution **OR** successful completion of the Educational Institute's five course [Management Specialization Program](#).

AND

- Current full-time employment in a CHFE qualifying position* with at least one year of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CHFE qualifying position* with at least two years of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHFE designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHFE certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

* Examples include: director or chief of engineering/property operations at a lodging hospitality company.

Outside the United States and Canada

Outside the United States and Canada, Professional Certification programs are managed by the Educational Institute's Hospitality Education Partners (HEP) licensees. If you are working in one of the HEP countries, and are interested in pursuing Professional Certification, please contact them directly. [Click here for HEP](#) country list and contact information.

Certified Hospitality Facilities Executive (CHFE) Body of Knowledge/Core Competencies

CHFE exam preparation material offers a thorough overview of the CHFE exam content, along with practice questions. Highlights include:

- Facilities Management
- Facilities Systems
- Financial Management
- Leadership
- Human Resources Management

Certified Hospitality Facilities Executive (CHFE) Recertification Requirements - Not published as of February 2013

Certified Lodging Security Director (CLSD) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CLSD designation through one of three options:

- Plan A emphasizes an education background
- Plan B emphasizes industry experience
- Plan C emphasizes early entry

Plan A Eligibility: Education Emphasis

- At least a 2-year degree from an accredited institution **AND** current full-time employment in a CLSD qualifying position* with at least one year of full-time experience in one or more such positions.

Plan B Eligibility: Experience Emphasis

- Current employment in a CLSD qualifying position* with at least two years of full-time experience in one or more such positions.

Plan C Eligibility: Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CLSD designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CLSD certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

Certified Lodging Security Director (CLSD) Body of Knowledge/Core Competencies

The Certified Lodging Security Director exam preparation material offers a thorough overview of the CLSD exam content, along with practice questions. Highlights include:

- Hotel Security Planning
- Guest and Hotel Asset Protection
- Emergency Management
- Hospitality Law
- Hotel's Legal Rights and Responsibilities

Certified Lodging Security Director (CLSD) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CLSD Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (15 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/20 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/20 points maximum)

CATEGORY 4: Educational Service (no minimum/15 points maximum)

Certified Hospitality Trainer (CHT) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHT designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution **OR** successful completion of the Educational Institute's five course [Management Specialization program](#).

AND

- Current full-time employment in a CHT qualifying position* with at least 1 year of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CHT qualifying position* with at least two years of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHT designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHT certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination BEFORE meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*Examples include: property-level training executive or director, department head at a lodging hospitality company.

Certified Hospitality Trainer (CHT) Body of Knowledge/Core Competencies

CHT exam preparation material offers a thorough overview of the CHT exam content, along with practice questions. Highlights include:

- The Investment of Training and Development
- Assessing Training Needs
- Instructional Design
- Training Tools, Techniques, and Technology
- Measuring and Evaluating Training and Development
- Training the Trainer
- The Hourly Employee Orientation, Socialization, and Training Process
- Mentoring
- Management Development and Executive Education
- Outsourcing Training and Development

Certified Hospitality Trainer (CHT) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CHT Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (15 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/20 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/20 points maximum)

CATEGORY 4: Educational Service (no minimum/15 points maximum)

Certified Hospitality Sales Professional (CHSP) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHSP designation through one of three options: Plan A emphasizes an education background; Plan B emphasizes industry experience; and Plan C emphasizes early entry. All plans require current full-time employment in the qualifying position* as well as documented evidence of managerial experience and successful completion of a comprehensive examination.

Plan A Eligibility -- Education Emphasis

- At least a 2-year degree from an accredited institution **OR** successful completion of the Educational Institute's five course **Marketing and Sales Management Specialization** program.

AND

- Current full-time employment in a CHSP qualifying position* with at least six months of full-time experience in one or more such positions.

Plan B Eligibility -- Experience Emphasis

- Current employment in a CHSP qualifying position* with at least one year of full-time experience in one or more such positions.

Plan C Eligibility -- Early Entry

Plan C requires a candidate to hold a qualifying position at the time of application. Plan C does not have an education requirement, but a degree will reduce the length of time you are required to spend in a qualifying position.

Through Plan C you can begin working on your CHSP designation and demonstrating your commitment to professional development the first day on the job. Plan C enables you to take the CHSP certification test up to three times so you can gauge your progress and knowledge against an industry proven standard. You no longer need to wait to see if you meet the benchmark of industry quality. You can prove it, and pursue a strong professional development regimen. This plan will allow individuals who are in qualifying positions to pursue their certification even if they are lacking in experience.

A Plan C candidate who is in a qualifying position:

- May sit for the examination **BEFORE** meeting the experience requirement.
- May take the examination up to 3 times.
- May sit for the examination while in the process of completing a degree.
- Will be required to submit documentation of employment at the time the experience requirement is met.

*Fifty percent or more of your duties and responsibilities involve sales to individuals or groups. All areas of hospitality sales are included: room, convention/conference, banquet/catering, group, etc. Examples include: banquet/catering manager, director of sales, sales manager, sales coordinator, and sales representative.

Certified Hospitality Sales Professional (CHSP) Body of Knowledge/Core Competencies

CHSP exam preparation material offers a thorough overview of the CHSP exam content, along with practice questions. Highlights include:

- The Marketing Plan
- Business and Leisure Travelers
- Travel Agents and Meeting Planners
- The Sales Office and Reservations
- Revenue Management
- Personal and Telephone Sales

Certified Hospitality Sales Professional (CHSP) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 40 points within FIVE years of the CHSP Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (10 points minimum/20 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/15 points maximum)

CATEGORY 3: Industry-Related Professional Involvement (5 points minimum/15 points maximum)

CATEGORY 4: Educational Service (no minimum/10 points maximum)

Certified Master Hotel Supplier (CMHS) - American Hotel & Lodging Educational Institute

Certified Master Hotel Supplier (CMHS) candidates must be currently employed as a supplier of products or services to the hospitality industry, with at least one year of full-time experience in one or more such positions.

Certified Master Hotel Supplier (CMHS) Body of Knowledge/Core Competencies

Candidates accepted into the Certified Master Hotel Supplier program receive a study guide to help prepare for the examination. Each guide provides all the information needed to understand how a

supplier's product or service integrates with the many functions of a lodging operation. CMHS candidates will receive the appropriate study guide for the CMHS track they have indicated on their application.

The study guide includes information on general hospitality operations, as well as information specific to the track selected, focusing on the specific competencies of various categories of vendors:

- Supplier
- Food and Beverage

Certified Master Hotel Supplier (CMHS) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 60 points within FIVE years of the CMHS Maintenance Enrollment Date.

CATEGORY 1: Professional Experience (10 points minimum/25 points maximum)

CATEGORY 2: Professional Enrichment (10 points minimum)

CATEGORY 3: Professional Achievement (8 points maximum) (optional)

Certified Hospitality Educator (CHE) - American Hotel & Lodging Educational Institute

Because individual backgrounds vary widely in the hospitality industry, applicants may pursue the CHE designation through one of two options:

Plan A

I meet all four PLAN A requirements:

- I am currently employed full-time as a post-secondary hospitality educator, with at least two years of experience in one or more such positions
- I have at least a baccalaureate degree or international diploma from an approved institution
- I have at least two years of full-time professional experience in the hospitality industry, with a minimum of one year in a managerial or supervisory position
- I speak, read, and write English fluently

Plan B

I meet all three PLAN B requirements:

- I am currently employed full-time or part-time as a post-secondary hospitality educator
- I have at least five years of full-time professional experience in the hospitality industry, with a minimum of two years in a managerial or supervisory position
- I speak, read, and write English fluently

[Certified Hospitality Educator \(CHE\)](#) – Body of Knowledge/Core Competencies

Visit web site for more information

Certified Hospitality Educator (CHE) Recertification Requirements

MAINTENANCE REQUIREMENT: A minimum of 50 points within FIVE years of the CHE Maintenance Enrollment Date.

CATEGORY 1: Professional Teaching Experience (5 points minimum/25 points maximum)

CATEGORY 2: Continuing Education (5 points minimum/25 points maximum)

CATEGORY 3: Professional Involvement (5 points minimum/25 points maximum)

CATEGORY 4: Educational Service (4 points minimum/20 points maximum)

Certified Association Executive (CAE) – ASAE

If the following statements describe you, then you should make attaining the Certified Association Executive credential your goal.

1. You have been employed by a qualifying nonprofit organization (trade association, professional society, individual membership organization, philanthropic organization) or association management company within the last five years.
2. You have three years of experience as a CEO at a qualifying organization and a bachelor's degree or higher OR you have five years of experience working at the staff level at a qualifying organization and a bachelor's degree or higher.
3. You are committed to upholding the ASAE Standards of Conduct and have no felony convictions related to the practice of association management.
4. You have completed 100 hours of broad-based qualifying professional development within the last five years. Candidates must complete 100 hours of broad-based association management related professional development activities within the five years preceding the application.

Qualifying Professional Experience

At the time you submit your application, you must meet the following professional experience requirements:

- Be currently or recently employed in a qualifying nonprofit organization or association management company such as a trade association, professional society, individual membership organization, or philanthropic organization.
- 'Recently employed' is defined as having been a paid employee in a qualifying position within the past five years at time of application.
- Internship experience and service as a volunteer leader is not applicable toward the professional experience requirement.
- Have sufficient qualifying professional experience at a qualifying nonprofit organization or association management company.
- 3 years experience as CEO with a bachelor's degree or equivalent
- 5 years experience as staff with a bachelor's degree or equivalent

Certified Association Executive (CAE) - Body of Knowledge/Core Competencies

DOMAIN 1: ORGANIZATIONAL MANAGEMENT

A. General Management

1. Define the association's core competencies and align operations and activities to capitalize on these competencies.
2. Identify and implement strategic mergers, acquisitions, and partnerships with other entities to position the association to most effectively accomplish its mission.
3. Develop and analyze internal (operational) and external (leadership and membership) performance metrics to optimize the association's operations and activities.
4. Institute a comprehensive leadership succession plan that builds on established strengths to position the association for the future.
5. Establish core values to provide a framework for effectively managing the association.
6. Develop and implement strategies to manage change and promote innovation.
7. Employ project management processes based on quantitative and qualitative measures so that activities can be conducted effectively and efficiently.
8. Implement quality control procedures to improve operations and stakeholder satisfaction.
9. Facilitate staff acquisition of state-of-the-art knowledge of association management practices to position the association to meet future challenges.

B. Branding and Positioning

1. Utilize environmental scan data to inform the development of branding and positioning strategies.
2. Identify the association's unique value proposition to correctly position the association.
3. Integrate the association's brand in all programs, services, and activities to reinforce the association's unique position.

C. Financial Management

1. Develop, recommend, and manage budgets to achieve strategic planning objectives.
2. Implement systems, metrics, and tools to monitor and manage financial performance.
3. Establish a user-friendly financial reporting system for the association, and any subsidiary corporations, to provide financial transparency to the board, staff, and members.
4. Implement a policy of independent periodic review and audit of the association's finances to identify weaknesses and capitalize on strengths.
5. Recommend, implement, and manage investment and reserve policies to enhance and protect the financial security of the association.
6. Evaluate the impact of economic and budget factors to effectively guide financial planning, investment policies, and financial performance.
7. Develop and establish policies and procedures to ensure strong internal financial controls to prevent financial/accounting irregularities and inappropriate funds accounting.

D. Globalization

1. Analyze, interpret, and communicate the impact of global macro trends (social, cultural, and economic) on the association and its key stakeholders to comprehend present position and to anticipate future needs.

2. Evaluate opportunities to grow the association's reach and impact, taking into consideration research, trends, and legal considerations, with the goal of identifying whether and how business should be expanded globally.
 3. Assess the implications of globalization on the association's members, programs, and services to ensure relevance in the global marketplace.
- E. Planning and Thinking
1. Establish and implement a strategic planning process based on sound methodological principles to advance the association's mission and vision.
 2. Communicate the mission and vision to members, staff, and the public to gain support and encourage participation in association programs and services.
 3. Assist the board in setting and implementing short- and long-term association priorities, based on a strategic planning process, to target and allocate resources.
 4. Extrapolate data from a variety of sources to develop strategies and tactics that achieve business goals and objectives.
 5. Identify and use performance metrics to evaluate, on an ongoing basis, the effectiveness of the strategic plan and revise plan as necessary.
 6. Develop funding strategies to address current and future needs and requirements identified in the strategic plan.

DOMAIN 2: LEADERSHIP

- A. General Leadership
1. Utilize qualitative and quantitative data to guide decision making.
 2. Engage in collaborative leadership with stakeholders to achieve mutually beneficial outcomes.
 3. Establish an organizational culture that is sensitive and responsive to the needs, interests, and values of the entire membership.
 4. Provide guidance to board members and volunteer leadership to assist them in fully executing their responsibilities.
 5. Integrate strategic leadership and calculated risk taking to achieve the long-term goals of the organization.
- B. Ethics
1. Comply with the American Society of Association Executive's Standards of Conduct to model ethical behavior.
 2. Maintain the highest degree of personal integrity in order to resolve ethical dilemmas.
 3. Establish and implement conflict of interest policies for board and staff to insure transparency.
- C. Diversity
1. Ensure that association communications, programs, products, and services reflect diversity to address and take into account the unique aspects of diverse populations.
 2. Create a climate of inclusiveness to promote understanding and respect for diversity.
- D. Interpersonal Skills and Group Facilitation

1. Advance staffs' professional and personal development through coaching, mentoring, career counseling and leadership development in order to build a stronger organization.
 2. Coach and mentor volunteer leaders and association staff to develop their interpersonal skills to increase their effectiveness.
 3. Facilitate individual participation and ownership in group decision-making and consensus building to increase board and staff effectiveness.
 4. Facilitate board activities, process, and objectives to advance the organization's mission and vision.
- E. Negotiating
1. Exercise effective and ethical negotiation skills to resolve conflicts and achieve consensus.
 2. Utilize conflict resolution skills to productively resolve differences among parties.

DOMAIN 3: ADMINISTRATION

- A. Human Resources
1. Establish and maintain a work environment that fosters staff teamwork, communications, efficiency, and effectiveness to retain quality staff and assure organizational efficiency.
 2. Implement a clear delineation of job functions, organizational responsibilities, and chain of command within the office through documented policies and procedures that promote organizational efficiency.
 3. Construct and implement legally compliant recruiting and hiring practices to mitigate exposure to risk and attract highly qualified staff.
 4. Establish core competencies for job descriptions and provide adequate supervision, coaching and training for effective staff performance.
 5. Implement a formal performance review process to maximize employees' potential.
 6. Structure and implement disciplinary and termination policy and procedures to ensure fair and equitable treatment of staff and mitigate exposure to risk.
 7. Develop, implement, and manage a strategic compensation program to attract and retain qualified association staff.
 8. Enforce compliance with applicable employment laws to mitigate exposure to risk.
- B. Technology
1. Identify and implement appropriate information technology systems and related policies and procedures to support association strategies and goals.
 2. Supervise the selection, purchase, installation, maintenance, and upgrading of information technology systems to support strategic objectives.
 3. Develop and implement secure systems to ensure data integrity and prevent unauthorized access.
- C. Legal and Risk Management
1. Identify, retain, and manage legal counsel to aid the association in complying with relevant laws and regulations and mitigate risk.
 2. Review and ensure proper use and execution of contracts to mitigate exposure to risk.

3. Develop policies and procedures in compliance with applicable laws to protect the association's reputation and assets.
 4. Monitor association actions and activities to protect not-for-profit status and maintain compliance with antitrust laws.
 5. Maintain required corporate and governance documents to ensure compliance with applicable laws.
 6. Maintain appropriate insurance coverage to protect the fiduciary interests of the association, members, and staff.
 7. Protect the association's intellectual property to maintain value and mitigate risk.
- D. Facilities Management
1. Develop and implement an organization-wide crisis management program to protect and secure human and physical assets.
 2. Evaluate association facilities and equipment to ensure fiscal responsibility and adequate resources.
 3. Ensure that the work environment is compliant with applicable laws and regulations to create a safe and accessible workplace.
- E. Vendor/Supplier Management
1. Evaluate the cost-benefit ratio and implications of outsourcing association functions to maximize operational efficiencies.
 2. Establish and implement objective procedures to develop requests for proposals (RFPs), including performance evaluation criteria, to avoid vendor bias and conflict of interest.
 3. Establish and implement conflict of interest and confidentiality policies, procedures, and supporting documentation to maintain organizational transparency and ensure that the association's interests and assets are protected.
- F. Business Planning
1. Align the association's activities, operations, and business plan to support the strategic goals and resources of the organization.
 2. Identify, retain, and/or manage accounting services to obtain the best financial information to support decision-making, to plan for financial sustainability, and for financial and legal protection.
 3. Identify objectives, strategies, and tactics to achieve business goals.
 4. Prepare business plans for new and existing programs, products, and services to guide operations and define criteria for outcome measures.
 5. Develop long-range funding and needs plans to ensure adequate financial assets for the future management and development of the association.
 6. Develop a business continuity plan to ensure continuation of the association's operations in the event of a disaster.

DOMAIN 4: KNOWLEDGE MANAGEMENT & RESEARCH

A. Knowledge Management System

1. Identify the information needs and preferences of stakeholders to leverage proprietary information and knowledge-based assets to develop a knowledge management program.
 2. Transmit the knowledge management program through delivery of high-quality products and services with speed, efficiency, and effective customer service to share leading edge profession or industry learning, insight, and best practices.
 3. Conduct ongoing evaluation of knowledge management systems to support continuous improvement.
- B. Research, Evaluation, and Statistics
1. Develop a research agenda to benefit the internal operations of the association, advance the profession or industry, and provide needed information for members and other stakeholders.
 2. Use appropriate research and data collection methods to guide decisions and operations within the association.
 3. Prepare customized research reports to meet the needs and interests of stakeholders.
 4. Develop a customized data reporting system to support strategy and positioning.

DOMAIN 5: GOVERNANCE AND STRUCTURE

- A. Governance
1. Conduct on-going review of governance documents to ensure they support the association's strategic direction.
 2. Establish, integrate, and maintain an effective and representative governance system to guide the association in accomplishing its mission.
 3. Establish and maintain governance structure for an effective system of components to develop and/or implement the mission of the association.
 4. Serve as liaison with the board and executive committee to implement the board's policy and vision.
 5. Facilitate the activities of the association's board of directors, committees, task forces, and special interest groups to support the accomplishment of the association's goals.
- B. Volunteer Leadership Development
1. Establish and maintain a volunteer recruitment, training, recognition, and accountability system to attract and retain active and effective involvement of membership.
 2. Work with the board to develop a volunteer leadership succession plan that facilitates the transition process.
 3. Educate and orient board members, volunteers, and staff regarding their respective ethics and fiduciary responsibilities to mitigate exposure to risk and ensure governance and management are performed properly.
- C. Component Relations
1. Establish policies and procedures to form association components to create entities that serve member needs.
 2. Develop and implement affiliation agreements to delineate lines of authority and responsibility for the association's components.

3. Provide relevant and timely resources to support the success and activities of association components.
4. Facilitate relevant and accurate information exchange between the association and its components to promote ongoing communication and positive relationships.

DOMAIN 6: PUBLIC POLICY, GOVERNMENT RELATIONS, AND COALITION BUILDING

A. Public Policy

1. Identify and analyze the need for public policy development activities for the purpose of determining how to best support the organizational mission.
2. Create an inclusive advocacy agenda to support the profession or industry.
3. Implement a public policy program to educate key stakeholders.

B. Government Relations

1. Implement and evaluate government relations programs that are consistent with board-approved policies to promote the association's objectives and goals.
2. Monitor legislation and regulation to evaluate its impact on the profession or industry.
3. Manage association lobbying activities to ensure compliance with applicable laws and regulations.
4. Establish and manage political action committees (PACs) to advance the association's public policy agenda.
5. Implement a grassroots advocacy program to advance the association's public policy agenda.

C. Coalition Building

1. Develop a coalition-building model that is responsive and flexible and which may include partnerships, alliances, and/or informal and formal relationships to advance mutual goals.
2. Organize short- and long-term coalitions to address single issues of common interest that advance the association's public policy agenda.

DOMAIN 7: MEMBERSHIP DEVELOPMENT

A. Member Relations

1. Develop communication strategies to keep members engaged and informed.
2. Create a variety of volunteer opportunities to encourage member contributions to association activities and advancement.
3. Establish a member-relations strategy that addresses the diverse needs and views of current and potential members.
4. Develop and enforce a member privacy policy, in accordance with applicable laws and regulations, to protect members' personal and financial data.
5. Analyze and implement, if appropriate, industry awards and member recognition programs to support association programs and strategic goals.

B. Membership Recruitment and Retention

1. Plan and implement membership recruitment and retention programs guided by the strategic plan and the results of a membership-needs analysis to expand and retain the membership base.
 2. Utilize market segmentation and targeting to develop appropriate strategies, messages, and delivery vehicles for current and potential members.
 3. Research and identify strategies and tactics that increase member return on investment (ROI).
 4. Communicate the value and relevance of the association to diverse populations of members and potential members to enhance membership retention and recruitment.
 5. Evaluate member recruitment and retention programs utilizing a variety of measures, including membership satisfaction and membership trends, to assure relevance of programs.
- C. Ethics Program
1. Foster an environment in which members are encouraged to identify and adhere to high standards of ethical behavior.
 2. Establish and manage an association ethics and discipline program to promote and enforce standards of ethical behavior.
 3. Plan and implement procedures and preventive education to help members maintain compliance with the association's ethical standards.
 4. Evaluate professional and industry practices to determine the impact on members and the public.
- D. Standard-Setting Programs
1. Establish and manage a voluntary standards program, if appropriate, to promote the profession or industry and assure the public of quality products/services.
 2. Structure and administer standard-setting programs that are equitable while protecting the association and minimizing liability risks.

DOMAIN 8: PROGRAMS, PRODUCTS, AND SERVICES

- A. Development of Programs, Products, and Services
1. Identify and determine the best methods for responding to the needs and interests of components and other stakeholders to develop relevant programs, products, and services.
 2. Conduct needs assessment and market research to evaluate the feasibility of introducing, modifying, or discontinuing programs, products, and services.
 3. Develop comprehensive implementation plans to ensure that programs, products, and services are developed and operated properly and cost effectively.
 4. Formulate marketing plans for programs, products, and services to increase effective non-dues revenue streams.
 5. Review metrics to evaluate programs, products, and services and make recommendations to maintain, improve, or discontinue.
 6. Identify, develop, and monitor revenue streams to provide funding for the association's activities.

- B. Fundraising, Sponsorships, and Development Programs
 1. Utilize qualitative and quantitative data to identify appropriate revenue generating vehicles for accomplishing association goals.
 2. Develop and execute a fundraising plan to improve the effectiveness of fundraising efforts.
 3. Collect and analyze qualitative and quantitative data associated with giving to evaluate the effectiveness of revenue generating initiatives.
 4. Develop criteria for establishing foundations and endowments within the not-for-profit legal structure and the philosophy and strategies of the association to ensure funds are spent in accordance with the donors' intent.
- C. Meeting and Events
 1. Determine program and format based on meeting or event purpose, content and audience to effectively manage logistics and enhance the success of the meeting or event.
 2. Manage planning, logistics, and operations to achieve successful meetings or events.
 3. Conduct post-meeting or event evaluation to measure outcomes relative to objectives and improve future meetings and events.
- D. Certification, Accreditation, and Licensure
 1. Develop, implement, and manage credentialing programs to define and promote professional standards.
 2. Investigate and evaluate relevant standards and legal implications and liabilities associated with credentialing programs to identify strategies for minimizing risk.
 3. Ensure that credentialing programs meet technical standards to maintain validity and reliability.
- E. Affinity Programs
 1. Determine policies and criteria for selecting, promoting, and continuing affinity programs that are consistent with the association's vision and mission.
 2. Develop, implement, manage, and evaluate affinity programs to maximize effectiveness.
- F. Professional Development Programs and Delivery Systems
 1. Develop and enhance the content of professional development products to ensure that the needs and requirements of members and industry are met.
 2. Evaluate and plan the use of multiple methods and delivery systems to appropriately address member needs.
 3. Incorporate an understanding of the conditions necessary for successful adult learning to guide the planning and development of professional development offerings.
 4. Plan and implement procedures and preventive education to help members maintain compliance with applicable laws and regulations.

DOMAIN 9: MARKETING, PUBLIC RELATIONS, AND COMMUNICATIONS

- A. Marketing
 1. Define the scope of the market and identify target segments and key stakeholder groups to ensure that marketing strategies and tactics are targeted appropriately.

2. Use environmental scanning, marketplace tools, and research to guide and implement the development of the marketing strategy.
 3. Develop and implement a marketing plan to support the association's position and branding, enhance membership recruitment and retention efforts, and promote programs, products, and services.
- B. Public Relations Programs
1. Identify the target groups and individuals that must be positively influenced to ensure that PR efforts are targeted appropriately.
 2. Plan, implement, and evaluate a public relations education and information program to positively influence groups and individuals and enhance public trust.
 3. Develop a crisis communications and management plan to prepare a media spokesperson to communicate the association's position.
 4. Formulate and articulate appropriate responses to inquiries from the media and the public to ensure that all relevant parties are properly informed.
- C. Publications, Media, and Messages
1. Evaluate consumer and trade media outlets and develop and implement media approaches to advance the association's goals.
 2. Integrate the communications delivery program to achieve the optimum messaging.
 3. Develop a variety of publications (including technical journals), media programs and delivery systems to meet the diverse needs and interests of members and stakeholders.
 4. Determine the most effective and feasible communication formats for accomplishing the association's goals and meeting the needs of members and stakeholders.
 5. Monitor, review, and assess publications and communications quality, usefulness and relevance, and implement changes as appropriate to meet communications goals and objectives.
 6. Plan, implement and monitor the strategy and applications associated with association web site development and maintenance to ensure the web site serves the mission of the association.
 7. Develop an editorial and peer review structure, if appropriate, to ensure integrity of publications.
 8. Provide effective communications strategies and interactive tools to engage members and stakeholders.

Certified Association Executive (CAE) Recertification Requirements

As outlined below, the renewal application documents 1) ongoing adherence to professional conduct requirements and 2) completion of professional development activities, or a combination of professional development activities and contributions to the profession:

- Renewing certificants must have completed a minimum of 40 hours of association management related professional development, or a minimum of 30 hours of association management

development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the profession of association management. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect or officer for committee service to a qualifying organization other than the applicant's employer.

- When renewing for the first time, applicants may include qualifying CAE credit hours not previously submitted for CAE credit provided the credits have been completed less than three (3) years prior to the certification cycle end date.
- Renewal applicants must again agree in writing that they will adhere to the ASAE Standards of Conduct and they must re-attest that they have not been convicted of a felony related to the practice of association management.

Destination Management Certified Professional (DMCP) – Association of Destination Management Executives

Qualification to take the test

- The application form lists all the requirements.
- Combination of time in the industry, work experience and your "activity level" in your own DMC and in the industry.
- You must have been in the industry for 3 years, or have a bachelor's degree with an industry related major from a major university.
- You must be employed in the industry when you take the exam.
- You must have a minimum of 90 points out of a possible 150 as a result of your program management experience, membership in various organizations, speaking assignments, teaching opportunities, panelist activities, awards, participation on industry committees, MPI meetings, etc.
- There are deadlines for each test. It is your responsibility to get all of this information from ADMEI and meet the requirements by the deadlines stated.
- All applications and accompanying forms must be submitted electronically.
- It is your responsibility to obtain, understand and follow all of the directions. They are more detailed than the summation listed here.

Points are awarded in five different areas:

Experience

- Points accrue based on your experience (the more you are involved in project management, the more points you earn, multiplied by a factor of the number of years that you worked in each area.). Program operation gets more points than if you were in administrative support. (35 points possible)

Management

- Supervision: you earn points for those whom you manage. (5 points maximum)
- Service and functions you performed (20 points maximum)
- Scope (size and number) of programs you supervised (30 points maximum)

Education

- Points for college degree, hospitality degrees earn extra points (10 points maximum)

- Continuing Education. One point for 10 hours of class time in our field, for 20 hours of sales/administrative classes, college credits, ten chapter meetings (MPI etc), ADMEI annual conference
- Other points for other efforts. See the application for details and examples
- Formal internship: 2 points for each 250 hours up to 1000 hrs. (10 points maximum)

Membership

- Your membership(s) in organizations for the last 5 years. Keep copies of your membership cards for the application.
- Organizations must be related to the industry.

Professional Contributions

- Authoring / Publishing. National publications get more weight than regional ones. (5 points maximum)
- Teaching and Speaking. When you volunteer, keep a copy of your program that lists you as an instructor, speaker or panelist. (10 points maximum) Speaking at internal meetings does not count for credit.
- Professional Awards. Honors from your peers (Best Corporate Event, etc.) or other certifications (CMP, CSEP, etc.) (5 points maximum)
- Leadership positions in industry organizations, chapters or affiliates. (10 points maximum)

Essay

- You must complete a 150 word (or less) essay that describes your involvement and why DMCP designation is important to you.

Destination Management Certified Professional (DMCP) Body of Knowledge/Core Competencies

1. The Destination Management Company
 - The DMC
 - Pricing Strategies
 - Technology Utilization
 - Ethics and Standards
 - E-business
2. Program Management
 - Facilities / Venues – room setup, décor, etc.

Site Selection – off-site, Convention Center, etc.
Food and Beverage
Program Planning/SOS
Special Events – off-site, themed events, props/décor
Registration

3. Special Services
 - Entertainers / Entertainment / Speakers
 - Production – staging, audio / visual, props
 - Other – security, amenities, gifts, invitations
 - Children’s / Youth Programs
4. Transportation
 - Transportation Services
 - Tours – spouse / guest, youth / child
5. Insurance and Legal Issues
 - Federal, state, county
 - Licensing / hold harmless
 - Liability, liquor liability laws
 - ADA compliance
 - Music licensing
6. Terminology / Glossary

Destination Management Certified Professional (DMCP) Recertification Requirements

A total of 50 points is required for DMCP® recertification. All points must be earned over the past five years since the date of DMCP® certification or last date of recertification (whichever is later.)

Summary

Continuing Experience	Section I	(10 point min)
Continuing Education	Section II	(10 point min)
Professional Contributions	Section III	(10 point min)
Total:		(50 point min)

Certified Meeting Professional (CMP) – Convention Industry Council

The application is made up of two sections that are required to be completed. It is recommended that applicants download and read the [CMP Handbook](#) prior to downloading the application.

SECTION I — PROFESSIONAL EXPERIENCE IN THE MEETING, EVENT, EXHIBITION AND HOSPITALITY/TOURISM INDUSTRY

Meeting, event, exhibition, and hospitality/tourism management hereinafter called "industry"

Option 1: Professional Experience

- Currently or recently employed in the industry (within the previous twelve (12) months) with a minimum of 36 months qualifying full-time work experience.

Option 2: Professional and Education Experience

- Currently or recently employed in the industry (within the previous twelve (12) months) with a minimum of 24 months qualifying full-time work experience AND holds a bachelor's degree or international equivalent in meeting, event, exhibition, and hospitality/tourism management. All professional experience and other meeting management activities submitted must have occurred in a professional context, not earned during academic study.

Option 3: Professional Experience in Academia

- Currently a full-time instructor of meeting, event, exhibition or hospitality/tourism management at an educational institution or university program with 36 months of full-time experience in academia.

SECTION II — INTERNSHIP OR CONTINUING EDUCATION REQUIREMENTS

Option 1: Industry Internship

- Completed a structured, supervised internship in meeting, event, exhibition or hospitality/tourism management with a minimum of 200 hours of work experience with a professional organization through an accredited educational institution or university.

Option 2: Continuing Education

- Completion of 25 clock hours of industry-related continuing education within the past five years. In order to receive credit for continuing education, courses must relate to one of the domain areas of the CMP International Standards (CMP-IS). The CMP-IS is the body of knowledge for the Certified Meeting Professional program and examination.

Certified Meeting Professional (CMP) Body of Knowledge/Core Competencies

DOMAIN A. STRATEGIC PLANNING

Skill 1: Manage Strategic Plan for Meeting or Event

Skill 2: Develop Sustainability Plan for Meeting or Event

Skill 3: Develop Business Continuity or Long-Term Viability Plan of Meeting or Event

DOMAIN B. PROJECT MANAGEMENT

Skill 4: Plan Meeting or Event Project

Skill 5: Manage Meeting or Event Project

DOMAIN C. RISK MANAGEMENT

Skill 6: Manage Risk Management Plan

DOMAIN D. FINANCIAL MANAGEMENT

Skill 7: Manage Event Funding and Financial Resources

Skill 8: Manage Budget

Skill 9: Manage Monetary Transactions

DOMAIN E. HUMAN RESOURCES

Skill 10: Acquire Staff and Volunteers

Skill 11: Train Staff and Volunteers

Skill 12: Manage Workforce Relations

DOMAIN F. STAKEHOLDER MANAGEMENT

Skill 13: Manage Stakeholder Relationships

DOMAIN G. MEETING OR EVENT DESIGN

Skill 14: Develop Program

Skill 15: Engage Speakers and Performers

Skill 16: Coordinate Food and Beverage Services

Skill 17: Design Environment

Skill 18: Manage Technical Production

Skill 19: Develop Plan for Managing Movement of Attendees

DOMAIN H. SITE MANAGEMENT

Skill 20: Select Site

Skill 21: Design Site Layout

Skill 22: Manage Meeting or Event Site

Skill 23: Manage On-site Communications

DOMAIN I. MARKETING

Skill 24: Manage Marketing Plan

Skill 25: Manage Marketing Materials

Skill 26: Manage Meeting or Event Merchandise

Skill 27: Promote Meeting or Event

Skill 28: Contribute to Public Relations Activities

Skill 29: Manage Meeting-Related Sales Activities

DOMAIN J. PROFESSIONALISM

Skill 30: Exhibit Professional Behavior

Certified Meeting Professional (CMP) Recertification Requirements

Eligibility is based on an application with two required areas of focus.

Professional Experience - Employment in the industry, full-time or part-time, for a minimum of 36 of the last 60 months

or

Employment as a full-time or part-time instructor of meeting, event, exhibition or hospitality/tourism management at an educational institution or in a university program, for a minimum of 36 of the last 60 months.

AND

Formal Education - Earning a bachelor's degree or higher or its international equivalent in any curriculum within the past five (5) years.

or

Continuing Education - Fulfilling twenty-five (25) clock hours of industry-related continuing education* within the past five (5) years.

or

Continuing Education and Industry Support Activities - Fulfilling fifteen (15) clock hours of industry-related continuing education* within the past five (5) years and participating in at least three (3) of the following activities:

Membership in a meeting/hospitality industry organization;

Member of an industry organization Board of Directors

Member of an industry organization Committee

Author of an article

Speaker at an event on an industry related subject (including study groups)

CMP Study Group Leader

Proctor a CMP Exam

Staff a CMP Booth

Global Travel Professional™ (GTP) – Global Business Travel Association

Eligibility Requirements

Candidates become eligible to take the GTP examination upon successfully documenting a minimum of three years business travel related experience. Business travel related experience is defined as time spent selling or procuring business travel services.

Global Travel Professional (GTP) Body of Knowledge/Core Competencies

DOMAIN 01 - Strategic Business Planning (15% of exam)

Task 0101: Meet with internal stakeholders from various functional areas to determine organizational culture, goals and objectives.

Task 0102: Review travel program to ensure that program goals align with overall organizational objectives.

Task 0103: Evaluate status and content of travel-related contracts.

Task 0104: Perform gap analysis of travel program components to identify potential areas for improvement.

Task 0105: Utilize business analytics (e.g., SWOT, cost analysis, market share analysis) for travel program optimization.

Task 0106: Communicate the travel program strategy to organizational management.

Task 0107: Evaluate the need for additional strategic projects such as strategic meetings management program, expense reporting tools, consolidated data management, etc.

DOMAIN 02 Buyer/Supplier Relations (28% of exam)

Task 0201: Identify, cultivate, and manage relationships with current and potential buyers and/or suppliers that support the travel program's goals and objectives.

Task 0202: Establish and prioritize strategic travel program goals that are mutually beneficial to buyers and suppliers.

Task 0203: Conduct due diligence (i.e., assess risk, security, financial viability, traveler feedback) with respect to potential buyer or supplier.

Task 0204: Prepare and issue/respond to RFIs/RFQs/RFPs for services related to the travel program.

Task 0205: Evaluate and select supplier(s)/customers based on responses to RFIs/RFQs/RFPs.

Task 0206: Mutually develop service level agreements (SLAs) and key performance indicators (KPIs) for inclusion in buyer-supplier contracts.

Task 0207: Identify and agree upon technology platforms to be used to support contract goals.

Task 0208: Monitor and ensure buyer/supplier compliance with organizational policies (e.g., sustainability initiatives, health and safety, security, ethics).

Task 0209: Negotiate terms and conditions of contracts.

- Task 0210: Communicate contract details and action items to appropriate parties.
- Task 0211: Identify and execute supplier and/or customer process improvements (e.g., Six Sigma, quality program).
- Task 0212: Conduct and/or participate in account reviews.
- Task 0213: Conduct internal contract audits (e.g., safety, security, internal expense).
- Task 0214: Develop and implement communication plans (e.g., product placement, internal promotion).

DOMAIN 03 Travel Program Administration (36% of exam)

- Task 0301: Contribute to development and ongoing review of organizational policies (e.g., corporate social responsibility, travel and expense, travel risk management).
- Task 0302: Monitor and evaluate compliance with organizational policies related to the travel program.
- Task 0303: Allocate resources (e.g., staff, budget, soft dollar benefits) for travel program activities.
- Task 0304: Develop, execute and maintain the internal stakeholder communication plan addressing travel program procedures and updates.
- Task 0305: Train/educate stakeholders on travel-related policies, procedures, and tools.
- Task 0306: Collaborate with relevant internal groups (e.g. travelers, finance, HR, IT, revenue management) to accomplish travel program initiatives.
- Task 0307: Identify and execute internal travel program related process improvements.
- Task 0308: Participate in travel industry activities to maintain and increase industry knowledge and support the advancement of company initiatives.
- Task 0309: Support the development and implementation of travel risk management, crisis management, and business continuity plans.

DOMAIN 04 Data/Analytics/Finance (21% of exam)

- Task 0401: Identify appropriate data sources required to support decision making process (e.g., ROI, cost analysis, program compliance, benchmarking).
- Task 0402: Gather, consolidate, and validate accuracy of data from identified sources.
- Task 0403: Create and analyze data reports for various stakeholder groups to identify trends, benchmark, and communicate travel program performance.
- Task 0404: Analyze and report travel spend in relation to budget/forecast.

KNOWLEDGE

- 01 - Industry sector products and services (e.g., air, rail, hotel, ground transportation, travel management company, corporate card, expense management)
- 02 - Industry trends and forecasts
- 03 - Marketplace/competitive landscape
- 04 - Organizational goals objectives and culture policies and procedures:
- 05 - Components of a managed travel program

- 06 - Travel industry terminology (e.g., global distribution system [GDS], strategic meetings management program [SMMP], passenger name record [PRN], International Air Transport Association [IATA], local receptive agent [LRA], online booking tool [OBT], travel management company [TMC])
- 07 - Strategic planning process and techniques:
- 08 - Communication strategies and techniques:
- 09 - Presentation techniques
- 10 - Basic financial/accounting concepts (e.g., budget preparation, internal forecasting, market share reporting)
- 11 - Revenue/yield management techniques and terminology
- 12 - Business metrics and models
- 13 - Travel reporting metrics
- 14 - Market share analysis techniques
- 15 - Strength weakness opportunity threat (SWOT) analysis process:
- 16 - Spend analysis tools and techniques
- 17 - ROI principles (e.g., business case evaluation, cost-benefit evaluation)
- 18 - Gap analysis process
- 19 - Strategic meetings management principles
- 20 - Regional and cultural differences
- 21 - Customer relationship management techniques
- 22 - Basic procurement practices and terminology (e.g., non-disclosure agreement, terms and conditions, due diligence, strategic sourcing)
- 23 - Supplier contracting scenario models
- 24 - Contract terminology
- 25 - Principles of project management (e.g., planning, scheduling, tracking, execution, reporting)
- 26 - Negotiation techniques
- 27 - Persuasion and influencing techniques
- 28 - Request for information/quotation/proposal/presentation
- 29 - Service level agreements
- 30 - Key performance indicators
- 31 - Goal setting process and methods
- 32 - Reservation and online booking tools
- 33 - Internal and external program audits (e.g., air/hotel/car rate audit, policy compliance audit, contract audit)
- 34 - Business continuity planning
- 35 - Technology products used in travel industry (e.g., online booking tools, reporting tools, traveler tracking tools, mobile applications)
- 36 - Process improvement techniques
- 37 - Travel risk management/duty of care processes, policies and procedures, and tools
- 38 - Data management techniques
- 39 - Data consolidation tools
- 40 - Data privacy requirements

- 41 - Management reporting
- 42 - Teamwork and dynamics
- 43 - Marketing techniques
- 44 - Change management concepts
- 45 - Expense reporting techniques

Global Travel Professional (GTP) Recertification Requirements

The GTP Recertification Program is designed to be a continuous process of learning and professional development. Recertification helps you stay well-versed in concepts, technology, principles, and best practices. Recertification provides employers and professionals with a method of assessing continued professional development. It is designed to facilitate continued development through participation in a variety of learning experiences, such as education, training, teaching, publishing, and volunteer leadership.

To recertify as a GTP, individuals must demonstrate their involvement in professional development activities OR demonstrate competency by successfully passing another GTP examination.

Continuing to uphold and abide by the GTP Code of Professional Conduct is also a requirement for maintaining and renewing your GTP.

To recertify as a GTP, individuals must complete a total of fifty (50) recertification credits within a three-year period. Recertification credits are the measuring units used to quantify approved learning and professional development activities. You may earn the recertification credits at any time during your three-year recertification cycle. Additional credits earned beyond the required 50 recertification credits cannot be “rolled over” to the next reporting cycle. You may begin earning credits toward recertification as soon as you are informed that you passed the examination.

Certified Revenue Management Executive (CRME) - HSMAI

Eligibility is determined by four main areas on the application. To qualify, you must have a minimum of 50 points:

Focus Area	Minimum Points Required	Maximum Points Allowed
Professional Experience	2	10
On-the-Job Responsibilities	3	25
Industry Support Activities	1	10
Education	20	NA

Certified Revenue Management Executive (CRME) Body of Knowledge/Core Competencies

Certified Revenue Management Executive (CRME) Recertification Requirements

CRMEs are required to renew their certification every three years. You must earn a minimum of 20 points on the recertification application, which verifies that you are still active in the field of revenue management. All points that you claim on the recertification application must have been earned since the date of your initial CRME certification, or your last renewal. It is important that you keep track of all your activities each year even after receiving the CRME.

Earn your points from each section below:

- Professional Experience
- On-the-Job Responsibilities
- Membership in an Industry Organization
- Leadership in an Industry Organization
- Authoring Published Articles
- Speaking at Industry Programs/Meetings
- Higher Education Coursework
- Non-Academic Coursework
- Certification

Certified in Exhibition Management (CEM) – International Association of Events and Exhibitions (IAEE)

The Certified in Exhibition Management (CEM) Learning Program is a nine-part adult learning and certification program designed to provide industry professional an in-depth understanding of the overall operations of the industry. To begin the CEM Learning Program, new candidates must have three years of full-time experience in the exhibitions and events industry. Documentation of experience is submitted through a Work History Verification form prior to registering for the first course. IAEE membership is not required for participation in the program but it is highly recommended.

Candidates may choose any nine (9) out of the eleven (11) courses offered to complete the CEM Learning Program. Courses are offered both online and on-location and each course has a corresponding exam that must be taken and passed within 90 days of the course date. Candidates have three years in which to complete all nine courses and exams. The candidates start date is the date that the first exam is passed and all requirements must be complete three years from that date. Information regarding CEM candidate extension requests, please [click here](#).

The CEM Learning Program is made up of the following eleven courses of which nine must be taken. Courses may be taken in any order. Before selecting courses, it is suggested that applicants view the Curriculum Blueprint and Course Descriptions.

CEM Learning Program Courses

- Conference and Meeting Management Principles*
- Event Marketing
- Event Operations
- Exhibition and Event Sales Fundamentals
- Facilities and Site Selection
- Finance, Budgeting and Contracts
- Floor Plan Development
- Housing and Registration Management
- Selecting Service Contractors
- Strategic Planning and Management
- Security, Risk and Crisis Management

*Those holding a current CMP designation can receive credit for this module by submitting the CMP certificate with a letter of request prior to completing the 9th and final course.

I. EVENT MARKETING – ATTENDANCE AND EXHIBIT/SPONSORSHIP PROMOTION

A. The Characteristics of Exhibitions

- a. Understanding the uniqueness of exhibitions
- b. Exhibitions and the Marketing Mix
- c. Globalization of the Industry
- d. How economic influences impact events and exhibitions

B. Developing effective attendance and exhibitor/sponsorship promotional marketing plans

- a. Sales vs. Marketing
- b. Defining the Goals & Objectives of the Event
- c. Post Show Analysis of Existing Events - data collection, research methods, attendance validation, etc.
- d. Analysis and Measurement of Past Event Effectiveness – via evaluations, response rates etc.
- e. Research of the Current Marketplace and Competitive Analysis
- f. Analysis of Event Positioning in Marketplace
- g. Defining The Target Markets – Attendees and Exhibitors/Sponsors
- h. Setting fees (registration, booths, sponsorships, advertising, etc.)
- i. Target Marketing and Expansion of Existing Markets
- j. Setting Marketing Goals and Objectives
- k. Developing the Marketing Plan for Attendance Promotion
 - 1. Considerations specific to attendance promotion
 - 2. Considerations of promotion for event types
- l. Developing the Marketing Plan for Exhibit/Sponsorship/Advertising Promotion
- m. Considerations specific to exhibit space and partner marketing opportunities
- n. Multi-cultural, generational and international marketing
- o. Communicating the Value of the Event to all audiences

C. Components of Integrated Marketing

- a. Promotional Media Vehicles
- b. Branding
- c. Database/List Management and Maintenance
- d. Public and Press Relations, Considerations and Management
- e. Content Development and Production Considerations

- D. Setting Time Lines & Project Management
 - a. Promotion Time Lines for Event Types
 - b. Staff and Resource Management
- E. Budgeting
 - a. Determining promotional budgets
 - b. Organizational financial impact of event
 - c. Impact of budget on promotion strategies and success
- F. Technology
 - a. Current Technology and Resources Utilized in Event Marketing
- G. Measuring the Success/Return on Investment of all Marketing Strategies
 - a. Analyzing and tracking promotional strategies

II. EVENT OPERATIONS

Advance Operations Management

- A. Management Team
 - a. Management Options
 - 1. In-house staff; outsourced functions
 - 2. Identifying the Team – Exhibit Operations, Exhibit/Sales Management, Management of Meetings/Education/Programming
- B. Event Definition/Perimeters Event Definition/Perimeters
 - a. Goals & Objectives of the Event
 - b. Event Types
- C. Budget Development
 - a. Overview of budgeting related to revenue and expenses of the event
 - b. Fiscal reviews and benchmarks
- D. Setting Time Lines & Project Management
 - a. Identifying Critical Projects

- b. Operations Time Lines
- c. Staff and resource management for all phases of event operations
- d. Coordination of time lines with vendors and facilities

E. Exhibitor Services

- a. Booth Assignments
- b. Sponsorship & Advertising Management
- c. Exhibitor Communications
- d. Exhibitor Service Manual
- e. Exhibitor Appointed Contractor Management
- f. Production of Attendee & Exhibitor Resources – online/print directories and communication vehicles
- g. Exhibitor Registration

F. Vendor & Facility Relations

- a. Vendors and services that support the Exhibition/Event
- b. Communications – Developing event specifications and work orders
- c. Security Scheduling
- d. First Aid/EMT Scheduling
- e. Insurance
- f. Defining Registration Requirement - staffing, equipment, etc.
- g. Planning and scheduling for on-site services - business center/printing, concessions, technology and communications, etc.
- h. Transportation
- i. Fire Marshall approval of floor plans

G. Materials shipment

- a. Management of shipment of on-site materials

H. Site Inspections

- a. Preliminary
- b. Final and tie down site inspections and meetings

I. Planning on-site staffing

- a. Assignment and scheduling of support staff, floor managers, etc.

On-Site Operations Management

J. Arrival On-Site

- a. Pre-event and Briefing Meetings – Facilities, Vendors/Services Contractors
- b. On-site labor considerations and GSC schedule review
- c. Registration and Attendee/Exhibitor Service Areas
- d. Offices, Management and Other Designated Areas
- e. Exhibit space – inspection and advance of move-in considerations and logistics
- f. Inspection of miscellaneous areas - marshalling yards, docks/receiving areas, etc.
- g. Signage, decorations and other considerations to customize facility to the event
- h. Review of Safety, Crisis, Security Policies with contractors and facility
- i. Attendee & Exhibitor Ground Transportation Coordination

K. Move-In

- a. Communications Center/Show Offices
- b. Core team assignments and management
- c. In bound freight considerations and logistics
- d. Security Management - Staffing, schedule, badging issues
- e. Management of safety and emergency considerations
- f. GSC set up management - exhibitor and show management needs
- g. Specialty contractor services management - exhibitor and show management
- h. Utility, rigging, communications, internet set up and management
- i. Exhibitor set up management
 - 1. Exhibitor set up assistance and customer service
 - 2. Enforcement of Regulations
 - 3. Late and no-show exhibitors

L. Special areas set up – Demo areas, F&B areas, Internet areas, etc.

M. Cleaning and floor clearing management

- a. Trash disposal
- b. Empties removal and storage
- c. Sanitation issues – i.e. food, regular trash, etc.
- d. General hall cleaning and prep for opening considerations
- e. Final exhibit area inspection considerations

N. Management of Event/Exhibition

- a. Management functions related to show
- b. Exhibitor Communications
- c. Daily Production Meetings

O. On-site sales management – Selling future year(s)

P. Move-Out

- a. Exhibitor Communication – Deadlines, procedures
- b. Security/First Aid/EMT Management
- c. Exit Policies Considerations
- d. Tear down and freight issues
- e. Billing and Master Account Review
- f. Site Walk Through
- g. Post-Con Meetings

Q. Evaluations and ROI measurement

- a. Development and deployment of post event evaluations
- b. Integration of feedback to future planning

III. FLOOR PLAN DEVELOPMENT

A. Preliminary Factors and Consideration

- a. Site Inspection
- b. Attendee, Exhibitor, Industry Profile Considerations
- c. Event History
- d. Building, Fire and Safety Codes and Considerations
- e. Determining Space Needs

B. Working with the General Service Contractor

- a. Initial Design Consultation
- b. Ongoing Communication with the GSC

C. Developing the Floor Plan

- a. Analysis of the Strengths and Weaknesses of Previous Plans
- b. Analysis of the Strengths and Weaknesses of Existing Plans
- c. Analysis of the Strengths and Weaknesses of Facility Features
- d. Industry Influences in Floor Plan Design
- e. Traffic Flow Patterns
- f. Type, Number and Size of Exhibit Spaces
- g. Placement of Feature Areas

- h. Location of Entrances and Exits
- i. Aesthetic and Visual Appeal
- j. Consideration of Facility Features – Utilities, Columns, etc.
- k. Booth Numbering
- l. Booth Sizes and Configurations
- m. Aisle Sizes and Considerations
- n. Flexibility of Design - reconfiguration, etc.
- o. Security and Safety Restrictions and Considerations
- p. Inclusion of Legend – Utilities, Column, Scale of Floorplan
- q. Space Assignment Systems
- r. International Shows and Floorplan Design Considerations

D. Traffic Enhancements

- a. Attendee Shopping Habits
- b. Feature and Presentation Areas
- c. Location of Other Event Features – Meeting Rooms, Registration Area
- d. Alternative Design Concepts and Non Traditional Floor Plans

E. Technological Resources

- a. Automation and Floorplan Design Software and Resources

F. Post Event Evaluation

IV. EXHIBITION AND EVENT SALES

A. Introduction

- a. Positioning the Exhibition

B. Integrated Marketing

- a. Using Advertising for Exhibition Sales
- b. Marketing Opportunities
- c. Promotional Opportunities
- d. Sponsorships
- e. Media Relations & PR

C. Sales Vs. Marketing

D. Understanding the Customer

- a. Repeat, Previous, First-time, Prospective Exhibitors
- b. Factors Used by Exhibitors to Evaluate Opportunities

E. Planning the Sales Campaign

- a. Target Markets
- b. Unique Selling Propositions
- c. Budget
- d. Staffing

F. Data Collection & Management

- a. Building the database
- b. Contact Management Software

G. Project Management in the Sales Process

- a. Setting Goals & Objectives
- b. Time Management
- c. Daily Goals

H. Sales and Marketing Collateral

- a. Media Options
- b. Having an Online Presence
- c. Developing the Prospectus
- d. Multiple Impressions

I. The Sales Process

- a. Contact options
- b. Understanding Features vs. Benefits
- c. Qualifying & Probing
- d. Objections
- e. Closing
- f. Evaluation

J. Relationship Selling

- a. The Virtue of Persistence

- b. Customer follow up
- c. Networking

K. Selling Internationally

L. Selling Green

M. Motivation

- a. Performance Measurements
- b. Incentive Programs
- c. Personal Motivation
- d. Motivating Others
- e. Seven Traits of Great Sales Leaders

N. Summary

V. CONTRACTED SERVICES & VENDORS

A. Identifying Contracted Services & Vendors

- a. Project Scope/Defining the Event/Project
- b. Operations Responsibilities and Considerations

B. Contracted Service Choices and Contractor/Vendor Functions

- a. Internal Staffing vs. Outsourcing Management Functions
- b. Sales, Marketing, Promotion, PR, Printing
- c. Facility
- d. Facility Types/Facility In-house/Preferred Services
- e. Registration
- f. Housing Management
- g. General Service Contractor & Sub-Contractors
- h. Exhibitor Appointed Contractors
- i. Specialty Contractors (Exhibitor & Show Management Needs)
 - 1. Floral
 - 2. Computer Rentals
 - 3. Communications & Internet
 - 4. Electrical & Utilities
 - 5. Furniture & Equipment Rental
 - 6. Cleaning

7. Photography
8. Booth Staffing/Talent
9. Lead Retrieval
10. Production (Special Event/Entertainment)
11. Audio Visual
12. Security
13. Transportation – Shuttle, DMCs
14. Shipping Options for show management and exhibitors
 - a. Freight carriers
 - b. Common carriers
 - c. Air Freight Carriers
 - d. Customs brokers
15. Interpreters
16. On-Site Temporary Personnel
17. Research & Evaluation Services
18. Publication Services
19. Other – technology, services for specific event types, etc.

C. General Service Contractors (GSC)

- a. Who and What are GSCs
- b. Exceptions to GSC's Supply Needs
- c. General Service Contractor Capabilities and Special Functions
- d. General Criteria for Making the Choice
- e. Determining Who Has Control of What
- f. Master Schedules, Time Lines, Critical Path

D. Labor Relations, Rights and Rules

- a. Labor considerations in relation to contractors
- b. Handling Disputes

E. Developing and issuing RFPs

- a. Establishing the scope of the project
- b. Identifying vendors/contractors for each project/event
- c. Vendor/contractor information sources
- d. Establishing contact
- e. Components of the Request for Proposal
- f. Criteria for Selection
- g. Analysis of proposals

F. Finalizing the Agreement

- a. Contract terms
- b. Negotiating fees and contractor charges
- c. Negotiating provisions and miscellaneous needs

G. The Working Relationship

- a. Establishing management and contractor roles and responsibility
- b. Identifying the key players
- c. Master Schedules, Time Lines, Critical Path
- d. Work Orders & Specifications
- e. Post Event Evaluation and Feedback

H. Payment & Billing

- a. Payment timelines, invoice processing

VI. SECURITY, RISK AND CRISIS MANAGEMENT

A. Security, Emergency and Crisis Issues Related to Exhibitions

B. Assessing Risk Management

- a. Technology Issues
- b. Security
- c. Insurance
- d. Safety and Emergency Planning
- e. Crisis and Readiness Preparation

C. Defining the Concepts

- a. Event Security
- b. Planning vs. Reacting
- c. Crisis vs Emergency
- d. Media and Public Relations Management

D. Exhibition Security

- a. Defining the Events Security Requirements

- b. RFP and Security Company Selection
- c. Security Staffing, Scheduling and Security Plans
- d. Security Considerations and Guidelines
- e. Badging and Identification Systems
- f. Technology Resources for Exhibition/Event Security

E. Insurance and Risk Management Considerations

- a. Identifying Liability Issues
- b. Types of Insurance
 - 1. Liability and General Liability
 - 2. Cancellation
 - 3. Policy Provisions
- c. Attendee Related Considerations
- d. Exhibitor/Event Related Considerations
- e. Facility Considerations
- f. Support staff and vendor considerations
- g. Food Services Considerations
- h. Liquor Liability and Issues

F. Exhibitor Insurance and Documentation

G. EAC Insurance

H. Crisis and Emergency Management/Preparedness

- a. Overview of Crisis Management
- b. Preparedness, Mitigation, Response, Reporting
- c. Advance Planning
- d. Site Selection and Site Visit Considerations
- e. Event and Exhibit Rules and Regulations

I. Developing the Crisis Management Plan

- a. Assessing the Organizations Resources Related to Risk and Crisis Management
- b. Crisis Types
 - 1. Attendee Related – Security and Personal Safety Issues
 - 2. Health and Sanitation Related
 - 3. Weather and Natural Disasters
 - 4. Acts of Violence
 - 5. Terrorism

6. Facility, Destination Infrastructure Considerations

J. Development and Dissemination the Preparedness Plan

K. Working with the Venue on Crisis Management

L. Staffing Issues

- a. Training
- b. Response Teams
- c. Communications Teams

M. Updating and Maintaining the Plan

N. Modifying the Plan for Specific Events and Destinations

O. Drills and Practice Runs

P. Orienting Staff, Leadership, Key Stakeholders

Q. Evaluation Criteria

- a. Evaluating Strengths and Weaknesses of the Organizations Risk Management and Crisis Management Plans

VII. HOUSING AND REGISTRATION MANAGEMENT

A. Registration Management Components

- a. Identifying the Event Needs
- b. Defining the Process
- c. Service Offerings
- d. Timelines and Deadlines
- e. Setting Fees
- f. Developing Registration Forms

B. Housing Management Components

- a. Housing Needs Analysis – Attendee and Exhibitor Profiles
- b. History and Pickup Patterns
- c. Choosing the best option based on event needs
- d. Room block required

- e. Rates & Additional Concessions
- f. Reservation agreements and procedures
- g. Cut off dates
- h. Revenue considerations
- i. Securing dates
- j. Reservation agreements and procedures

C. Systems Analysis

- a. Registration Technologies and Offerings
- b. Technology resources for managing the housing process
- c. Selecting the Right System/Vendor
- d. In-house, Outsourcing, Online Options

D. Data Management and Collection

- a. Managing the Registration Process
- b. Data Collection
- c. Payment Methods and Processing
- d. Communication Procedures and Confirmations
- e. Reporting and Monitoring
- f. Financial and Accounting Processes

E. Badging and Identification Systems

- a. Types of Badging and Credential Systems
- b. Lead Retrieval
- c. Continuing Education Credits/Tracking

F. On-Site Management

- a. Technology and Equipment Needs
- b. Staffing and Personnel Requirements
- c. Registration Area Layout and Set Up
- d. Registration Procedures
 - 1. Attendee/Speaker/VIP Registration
 - 2. Exhibitor Registration
- e. Traffic Patterns, Flow and Crowd Control Issues
- f. Management and Troubleshooting
- g. Technology Management

G. Ancillary Components

- a. Message Centers, Internet/Email Stations, Product Locators

H. Evaluation Processes

- a. Monitoring Technology Developments
- b. Evaluating Systems and Procedures

VIII. FACILITIES AND SITE SELECTION

A. Overview of Facility Options

- a. Convention Centers
- b. Hotels
- c. Conference Centers
- d. Fairgrounds
- e. Other potential venues

B. Evaluating facilities types and their services

- a. In-house and support services/resources offered
- b. Advantages and Disadvantages of facility types
- c. Administrative Areas and Support
- d. Cost factors

C. Defining Event Needs

- a. Needs Analysis
- b. Event History and Evaluations
- c. Event Objectives
- d. Value of the Event
- e. Hotel/sleeping room needs (one hotel, multiple hotels, etc.)
- f. Event Space Needs

D. Establishing geographic location

- a. Attendee/Exhibitor Demographics
- b. Transportation Costs and Considerations
- c. Consideration of Event Needs in Relation to Location
- d. Competition

E. Identifying Facility and Destination Requirements

- a. Meeting Space
- b. Exhibit Space
- c. Special Event Space
- d. Public Space
- e. Location – geographic location, downtown facilities, etc.
- f. Hotel Accommodation needs

F. Evaluation of Potential Sites/Destinations

- a. Comparison and analysis of advantage and disadvantages of potential facilities and destinations

G. The Site Visit

- a. Site visit checklist (APEX guidelines)
- b. Evaluating the destination
- c. Evaluating the potential facility(ies)
- d. Convention and Visitor Bureau services
- e. ADA Considerations

H. Management Perspectives

- a. Exhibit and show managers' needs
- b. Meeting space and meeting managers needs
- c. GSC needs and input

I. Developing related RFPs - RFP Components and Contents

- a. Hotel RFPs
 - 1. RFP for meeting space and sleeping rooms
 - 2. RFP for sleeping rooms only, Headquarters Hotel, etc.
- b. Convention Center RFPs
- c. City wide and multi venue RFPs

J. Selection Process

- a. Evaluating Proposals for Potential Sites and Facilities
- b. Selection Criteria

IX. FINANCE, BUDGETING AND CONTRACTS

A. Defining Revenue Potential

- a. Revenue Sources
 - 1. Attendee Registration
 - 2. Exhibit Sales
 - 3. Sponsorships and Advertising

B. Defining Costs and Expenses

- a. Identifying Expense Items

C. Establishing Fees

- a. Calculating Registration Fees
- b. Establishing Exhibit Fees
- c. Establishing Sponsorship, Advertising, Promotional Fees

D. Accounting Principles

- a. Accounting Fundamentals
- b. Financial Statements and Reporting
- c. Technology and Software Resources

E. Developing the Budget

- a. Budgeting Philosophies
- b. Budgeting Methods
- c. Forecasting Revenue and Expenses
- d. Monitoring the Budget

F. Managing and Controlling Cash and Cash Flow

- a. Establishing Procedures

G. Payment Methods and Currency Considerations

H. Billing and Invoicing

- a. Master Accounts

- b. Payment Reconciliations
- c. Establishing Credit with Facilities

I. Contract Management and Negotiation

- a. RFP Process to Contract Review
- b. Contract Negotiations and Pricing

J. Exhibition Contracts

- a. Components of Exhibit, Sponsorship and Advertising Contracts and Agreements

K. Vendor Contracts

- a. Services offered, rates/fees and other considerations

L. Hotel Contracts

- a. Room block required
- b. Rates & Additional Concessions
- c. Reservation agreements and procedures
- d. Commissionable rates
- e. Attrition considerations
- f. Cancellation and termination clauses

M. Facility Contracts

N. Rates & Additional Concessions

O. Cancellation and termination clauses

P. ADA Considerations

Q. Terminology & Components of Contracts

R. Terms & Conditions of Contracts

S. Legal Implications and Considerations

T. Dispute Resolution

X. Strategic Planning and Management

A. Defining Exhibitions and Events

- a. Understanding the Uniqueness of Exhibitions
- b. Exhibitions and the Marketing Mix
- c. Globalization and Economic Influences of the Exhibition and Events Industry

B. Strategic Planning for Improving and/or Launching Events

- a. The Events Role within the Organization and Marketplace Position
- b. Association Events vs. Privately Owned Shows

C. Developing a Strategic Plan for Exhibitions and Events

- a. Strategic Planning Approach
- b. Needs, Market, and Competitive Analyses, S.W.O.T.
- c. Defining Mission, Goals, and Objectives
- d. Critical Success Factors, Barriers, and Implementation Plan
- e. Evaluation
- f. Strategic Plan Format
- g. Launching a New Exhibition/Event

D. Communicating the Organization/Events Message

E. Public Relations

- a. Creating and Maintaining Positive PR and Media Relations

F. Project Management Considerations

- a. Project Planning
- b. Preparing a Master Schedule and the Critical Path for All Projects
- c. Resource and Staff Allocations
- d. Teams and Team Building
- e. Financial Considerations

G. Evaluation

- a. Evaluation Criteria Throughout the Management Process
- b. Analyzing Data and Statistics from the Event

H. Implementing Processing Improvements

XI. CONFERENCE & MEETING MANAGEMENT PRINCIPLES FOR THE EXHIBITION MANAGER

A. Types of Meetings

- a. Meeting & Event Formats
- b. Educational meetings/sessions
- c. Business Meetings
- d. General sessions and productions
- e. Special Events

B. Programming and Educational Offerings

- a. Needs Assessment
- b. Event Objectives
- c. Program Objectives
- d. Learning Objectives
- e. Attendee needs and demographics/Industry Trends
- f. Purpose of meetings and educational content
- g. Educational Content Development
- h. Delivery options
- i. Meeting and Education Environment
 1. Learning and Teaching Aids and Resources
 2. Speakers and Speaker Management
- j. Adult Learning Principles
- k. Evaluation Processes
- l. Offering and tracking continuing education credit

C. Budget Considerations

- a. Meeting Specific Budget Items
 1. Audiovisual
 2. Speaker Costs
 3. Printing
 4. Room rental, set up charges
 5. Food and Beverage needs

D. Management Considerations

- a. Identifying the team and responsibilities
- b. Project timelines
- c. Technology resources

E. Meeting Management Logistics

- a. Room Assignments
- b. Room set ups
- c. Types of set ups and advantages/disadvantages
- d. AV Considerations
- e. ADA Considerations
- f. Meeting Specifications
- g. Food and Beverage Management
- h. Banquet Event Orders and Work Orders
- i. Guarantees
- j. Special Events
 - 1. Production Companies
 - 2. Music Licensing
- k. Planning Green Meetings

F. On-site management

- a. Facility Contacts/Staffing
- b. Pre & Post Meeting Briefings

Certified in Exhibition Management (CEM) Recertification Requirements

Complete 15 credit hours of industry-related, continuing education during your three-year recertification cycle. Up to three credit hours may be earned through participation in exhibitions and events industry and IAEE ACTIVITIES. (See ACTIVITIES section for more information). One hour of continuing education equals one credit hour. Education does not need to be pre-approved. More than 15 credit hours cannot be carried over to the next certification cycle.

CONTINUING EDUCATION / PROFESSIONAL DEVELOPMENT

- Participate in industry-related, continuing professional development education that pertains to the CEM Blueprint within three-year recertification cycle.
- Course must be a minimum of one hour in length. One hour of education is equal to one credit hour.
- ICEEM Webinar - one credit hour

- A maximum of six hours may be requested for courses more than six hours in length.
- CEM Learning Program course = six credit hours per course
- IAEE Sales Academy or IAEE Marketing Academy = 12 credit hours each
- Krakoff Leadership Institute or Krakoff Advanced Leadership Institute = 12 credit hours each
- Required 15 credit hours may all be earned from this category OR a total of 12 credit hours may be earned from this category combined with three credit hours from the ACTIVITIES category below.

ACTIVITIES

- Contribute to the exhibitions and events industry and IAEE by participating in industry activities.
- Each activity is equal to one credit hour and a maximum of three credits may be earned from this category.
- Activities must be related to the exhibitions and events industry
- Active participation OR leadership role on an industry or IAEE board, committee, task force or chapter = one credit hour per term
- Published author (newsletters, blogs not eligible)
- Speaker at an exhibitions or events industry event = one credit hour for each hour of instruction
- IAEE Krakoff Leadership Institute or Each One Reach One Mentor = one credit hour
- Proctor a CEM Exam (outside of course instruction) = one credit hour

*IAEE CEM Faculty will earn three credits towards the activities section and three credits towards continuing education section for the first CEM course taught during their three-year recertification cycle. Each course taught after initial course will earn three credits towards continuing education section.

FORMAL EDUCATION

- Earn a bachelor's degree or master's degree within three-year recertification cycle.
- Required 15 credit hours may be earned all from this category.

Certified Facilities Executive (CFE) - International Association of Venue Managers (IAVM)

To qualify as a candidate for certification, a facility executive must first have seven years of experience in the top two levels of management at a public assembly facility and be a graduate of a four-year college or university. Additional public assembly facility management experience may be substituted year-for-year for the educational requirement.

An individual must show accumulation of 300 points, achievable as outlined below:

- Higher Education and Certification
- Public Assembly Facility Management Experience
- Continuing Education
- Facility-Intensive Education Programs
- Teaching/Program Participation
- Publication of Written Works
- Professional and Community Activities

Certified Facilities Executive (CFE) – Body of Knowledge/Core Competencies

Test questions will cover the following areas:

INTRODUCTION TO PUBLIC ASSEMBLY FACILITIES

The Meetings & Expositions Industry (*approx. 10 questions*)
The Sports and Entertainment Industries (*approx. 10 questions*)
Arenas (*approx. 5 questions*)
Stadiums (*approx. 5 questions*)
Auditoriums and Performing Arts Venues (*approx. 5 questions*)
Convention Centers/Exhibit Halls (*approx. 5 questions*)
Amphitheaters (*approx. 5 questions*)
Facility Design, Construction, and Renovation (*approx. 8 questions*)
Role of the Manager (*approx. 8 questions*)

ADMINISTRATION OF THE PUBLIC ASSEMBLY FACILITY

Contract Services (*approx. 10 questions*)
Booking & Scheduling (*approx. 10 questions*)
Human Resources Management (*approx. 10 questions*)
Policies & Operating Procedures (*approx. 10 questions*)
Technology (*approx. 10 questions*)
Risk Management & Insurance (*approx. 10 questions*)

FINANCIAL MANAGEMENT

Effective Budgeting (*approx. 8 questions*)

Audit Controls *(approx. 7 questions)*
Cost Analysis *(approx. 5 questions)*
Financial Reporting *(approx. 7 questions)*

MARKETING

Marketing Planning *(approx. 8 questions)*
Advertising *(approx. 6 questions)*
Public Relations *(approx. 6 questions)*
Customer/Patron Services *(approx. 6 questions)*

BUILDING OPERATIONS

Housekeeping *(approx. 7 questions)*
Maintenance *(approx. 10 questions)*
Staging and Event Production *(approx. 10 questions)*
Labor Relations *(approx. 6 questions)*

PATRON SERVICES

Box Office *(approx. 10 questions)*
Food & Beverage *(approx. 10 questions)*
Security & Crowd Management *(approx. 10 questions)*
Other Services (Parking, Novelties, Equipment Rental, etc.) *(approx. 5 questions)*
Accessibility for the Physically Challenged *(approx. 8 questions)*

Individuals who pass the written examination will be required to sit for an oral interview by a panel of Certification Board members. The oral interview panel will evaluate the candidate's knowledge of a series of industry topics that probe professional experience, management philosophy, professional contributions, and overall management of public assembly facilities, including arenas, stadiums, convention centers and performing arts venues. The oral interview panel will also evaluate the candidate's ability to articulate those points. The panel will consider the above criteria to determine whether the candidate passes the oral interview.

Certified Facilities Executive (CFE) – Recertification Requirements

Certified Facilities Executives must recertify with a minimum of 36 points every three years in order to maintain their certification. The Certification Board has established this requirement under the rationale that maintaining competency in the field of public assembly venue management requires continuing professional development through activities such as continuing education programs, teaching and program planning, writing and publishing and community service. Recertification demonstrates your continued dedication to stay up-to-date with the changing Public Assembly Venue Management profession, and it is an important indicator that shows your dedication to your profession and industry by continuing your education and maintaining your certification.

Certified Special Events Professional (CSEP) – International Special Events Society

To qualify as a candidate for the CSEP exam, one must have a minimum of three (3) years of full-time professional employment in the special events industry. Documentation of work experience is required.

Acceptable forms of documentation can include but are not limited to: statement of employment verification from personnel or human resources official, copy of W2 forms (USA applicants only). Supporting documentation must be submitted in English. If these documents are in a language other than English, the candidate is responsible for having the documents translated into English and notarized.

Certified Special Events Professional (CSEP) Body of Knowledge/Core Competencies

- 1) Development Phase – 27%
 - A. Determine purpose of event and prioritize goals and objectives
 - B. Identify strengths, weaknesses, opportunities and threats (SWOT analysis)
 - C. Identify event element requirements (e.g., technical production, food and beverage, ancillary programs, entertainment, risk management, and décor)
 - D. Analyze site requirements and select appropriate site
 - E. Determine need for ancillary programs (e.g., companion programs, exhibits, optional side trips, recreational activities or mini-events within event)
 - F. Define and develop integrated marketing plan (e.g., situation analysis, marketing objectives, target markets and messages and measure return on marketing (ROM))
 - G. Identify and develop promotional strategy (e.g., advertising, Internet promotions, Web site, sales promotions and contests)
 - H. Identify and develop direct sales strategy (e.g., box office and ticket operations, souvenirs and promotional merchandise)
 - I. Identify and develop public relations strategy (e.g., media releases, requests for coverage, photo opportunities, media relations, publications, event publicity and public guest appearances)
 - J. Identify and develop sponsorship program (e.g., sponsorships, donors, grants and gifts)
 - K. Identify protocol and ceremony needs and develop protocol plans as required (e.g., dignitaries, government and other officials, special equipment, flags and emblems)
 - L. Conduct a risk assessment and analysis
 - M. Develop event design
 - N. Ensure event complies with all federal, provincial, and state legislation and local ordinances
 - O. Ensure event complies with labor union jurisdictions and regulations
 - P. Determine proper insurance coverage (e.g., liability, event insurance, additional insurances)
 - Q. Develop an initial budget
 - R. Prepare and present a proposal

2) Pre -production Phase – 45%

- A. Re-assess available resources (e.g., vendors, funds, people, etc.) and time restrictions
- B. Implement record keeping procedures
- C. Create time lines, including production calendar and schedules
- D. Schedule vendor/suppliers meetings
- E. Develop event evaluation criteria
- F. Develop a site plan
- G. Review and comprehend vendor proposals
- H. Create structure of responsibility pertaining to event management and its staffing
- I. Oversee communications with and between all involved parties (e.g., status reports and budget updates)
- J. Determine logical sequence of show or event flow
- K. Coordinate event element requirements
 - 1. Site and site services (e.g., parking, waste management, capacity, power, telecommunications and floor plan)
 - 2. Entertainment/presentation (e.g., riders, scripting and rehearsals)
 - 3. Transportation (e.g., manifests, shuttle service, airport service and valet)
 - 4. Food and beverage (e.g., alcohol management, catering, guarantees and dietary needs)
 - 5. Technical production (e.g., audio/visual, lighting, sound, special effects and technical rehearsal)
 - 6. Rentals (e.g., delivery and setup)
 - 7. Décor (e.g., scenery, props, branding and floral)
 - 8. Risk management (e.g., security, EMS, contract liability, fire marshal and crowd control)
 - 9. Guest services (e.g., handicap accessibility, translation, hospitality and VIP services)
 - 10. Media production (e.g., photography, videography and show content)
 - 11. Collateral material (e.g., signage, invitation, brochures, promotional items and gifts)
 - 12. Staffing (e.g., recruitment, training, motivation, and evaluation of personnel and volunteers)
 - 13. Ancillary programs (e.g., excursions, companion programs and recreational activities)
 - 14. Marketing and public relations (e.g., press area, event publicity, photo opportunities and sponsorship)
 - 15. Shipping and receiving (e.g., drayage, trucking and courier service)
- L. Devise contingency and response plans
- M. Ensure event complies with licensing regulations and other intellectual property rights (e.g., ASCAP and BMI)
- N. Secure all necessary insurance coverage, licenses, permits, waivers, and other compliance instruments and documentation
- O. Negotiate and execute necessary agreements, contracts, leases and other legal documents
- P. Conduct pre-event production meetings and personnel/participant orientations

3) Production Phase – 20%

- A. Implement production schedule
- B. Employ communication systems (e.g., methods of communication and communication protocol)
- C. Implement risk monitoring and control systems as needed (e.g., contingency and response plans, and safety procedures)
- D. Coordinate load-in; load-out
- E. Ensure conceptual and contractual compliance of event
- F. Conduct pre- and post-inspection of event (e.g., security, health and safety, client, staff and site)
- G. Establish behind-the-scenes locations (e.g., green room, production office and rehearsal space)
- H. Response to and documentation of incidents and changes (e.g., incident reports, change orders and Signed authorizations)

4) Post-production Phase – 8%

- A. Determine return on investment (ROI) (e.g., internal and external stakeholders and measurable objectives)
- B. Analyze and evaluate entire event management process
- C. Audit and reconcile finances and present final budget (e.g., final invoices/billing, financial reports, and profit and loss)
- D. Archive information (e.g., legal documentation, media documentation and samples)
- E. Ensure full compliance with contractual obligations (e.g., equipment return and payment schedules)

Certified Special Events Professional (CSEP) Recertification Requirements

A candidate for the Recertification must have accumulated a minimum of twenty five (25) points before the recertification application may be submitted. All points claimed must have been accumulated within the past five (5) years.

Certified Professional Catering Executive (CPCE) – National Association of Catering Executives

To be eligible to sit for the CPCE exam, applicants must be currently employed in the catering and event industry and must have a minimum of 60 points as outlined by the eligibility requirements below.

Documentation must be attached to receive points (this includes NACE-related activities). Your application **cannot** be approved until you have submitted your documentation.

Documentation Guidelines (*Please review before completing application*)

- **If documentation is in the form of a letter, it should be on official letterhead from the organization providing it**
- **Documentation must include the date(s) of the achievement**
- **Documentation for continuing education must include the number of hours of the educational session**

Experience in the Catering and Event Industry (*maximum of 10 points*)

- To be calculated with one point per year (from the past 10 years), to include full-time positions in catering and events
- Include title, description of job responsibilities, organization and employment dates
- Your supervisor's signature in the Immediate Supervisor Verification section will serve as documentation. If you are a business owner, a copy of your business license or a similar document will suffice.

Education and Continuing Education (*maximum of 50 points*)

Formal Education (*maximum of 10 points*)

Please list school name, address, degree and date issued. **Documentation must be included** (e.g., transcript, diploma, etc.). You will receive points for the **highest level** of education achieved.

- High School
- Internship Programs
- Associate's Degree
- Associate's Degree in hospitality management
- Certificate Degree in hospitality management
- Bachelor's Degree
- Bachelor's Degree in hospitality management
- Master's Degree
- Master's Degree in hospitality management

Continuing Education (*1 hour of continuing education = 1 point*)

Please list any continuing education programs which pertain to the catering or event industry (from the past 10 years). **Documentation must be attached and should include how many hours of educational instruction you received** (e.g. copies of certificates or letters on official letterhead).

- Company/organization sponsored continuing education or training
- Local professional development (including certificate programs)

- NACE education programs (chapter educational programs, Experience! Conference, Leadership Summit, webinars, seminars)
- Allied association education programs

Industry Membership (maximum of 10 points, 1 point per year)

Candidates may receive one point per year for professional memberships from the past 10 years in recognized organizations that are directly related to the catering and event industry. **Documentation must be included** (e.g., letter from organization (on official letterhead), copy of membership certificate(s)/ card(s) or proof of payment(s)).

Accepted Industry Memberships

- American Culinary Federation
- American Hotel and Lodging Association
- American Society of Association Executives
- Association for Convention Operations Management
- Association of College Conference and Events Directors
- Association of Destination Management Executives
- Hospitality Sales and Marketing Association International
- International Special Events Society
- Meeting Professionals International
- National Association of Catering Executives
- Professional Convention Management Association
- Other industry membership and leadership positions (based on acceptance by NACE)

Leadership Positions (maximum of 10 points)

Candidates may receive points for leadership positions held for companies or organizations related to the catering and event industry **within the past 10 years**. Positions may be for held for company-sponsored committees or may be at the national or chapter level for organizations. Your **term must be completed** by the date of your application submission. **Documentation must be included** (e.g. appointment letter/committee list (on official letterhead) or certificate of recognition).

National Role

Officer of Board of Directors	6 per term
Board Member	5 per term
Committee Chairperson	4 per term
Committee Member	3 per term

Company Sponsored Role

Officer of Board of Directors	5 per term
Board Member	4 per term
Committee Chairperson	3 per term
Committee Member	2 per term

Chapter Role

Officer of Board of Directors	4 per term
Board Member	3 per term

Committee Chairperson	2 per term
Committee Member	1 per term

Professional Achievements (maximum of 10 points)

The achievements must be related to the catering and event industry and must have been completed **within the past 10 years. Documentation must be included** as proof of completion (e.g., articles, certificates or letters on official letterhead).

- Seminar presenter (2 points)
- Seminar panelist (1 point)
- Teacher, facilitator/trainer or instructor (2 points per class, maximum of 10 points)
- Certifications or recertifications (2 points per certification/recertification)
 - CAE, CHME, CMM, CMP, CSEP, etc.
- Awards/recognition for professional accomplishment (2 points)
- NACE Professional Reference Guide contributor (5 points)
- Author of professional article (2 points per article)
- Author of chapter in book (5 points)
- Book author (10 points)
- Author of a professional blog for a company or organization related to the catering and event industry (1 point)

NACE Support Activities (maximum of 10 points)

Activities that receive points in this area are part of the responsibilities of **NACE national or NACE chapter leaders** and/or **committees. Documentation must be included.** (e.g., letter from chapter board member or national staff member (on official letterhead)). Activities must have been completed within the past 10 years.

- NACE recruitment booth (1 point per occurrence)
- NACE related community service (1 point per occurrence)

Certified Professional Catering Executive (CPCE) Body of Knowledge/Core Competencies

The CPCE exam consists of 175 multiple choice questions designed to emphasize the core competencies of the catering and event industry: Accounting, Beverage Management, Catering Services, Contracts and Agreements, Event Management, Food Production, Human Resources and Sales and Marketing. Each exam offered is a different exam representing a new selection of items from the CPCE Test Item Bank. The numbers in parentheses designate the number of questions that may be included in an individual examination.

Accounting (16)

- Define the elements of financial statements, including statement of cash flow, balance sheet and income statement.
- Define basic accounting terminology for catering executives.
- Define accounting and inventory valuation methods.

Beverage Management (28)

- Describe fundamental characteristics of various types of beer, spirits and wines.

- Identify the primary legal considerations with regard to alcohol service.
- Explain how to calculate beverage cost and pricing for profit.

Catering Services (28)

- Describe basic characteristics of various styles of food service.
- Distinguish table service from buffet service, station service and other types of food service.
- Estimate staffing needs for typical catered events using a particular style of service.

Contracts and Agreements (16)

- Identify the components of a contract.
- Explain essential clauses for receiving and products and services.
- Explain “truth in menu” laws.

Event Management (28)

- Describe and identify various event functions and the appropriate sequences of events for those functions.
- Calculate the appropriate square footage requirement for different types of room setups.

Food Production (28)

- Describe commonly used methods of food preparation for various styles of service.
- Apply standard measurement systems for liquids and solids to convert recipe ingredients.
- Calculate the number of portions necessary to prepare for various types of catered events.
- Describe safe procedures for food preparation, storage and handling.

Human Resources (15)

- Describe the steps in the hiring process.
- Describe the goals and information provided during the onboarding process.
- Describe the stages of the training cycle.
- Identify the basic functions and legal considerations involved in employee performance appraisals.
- Identify guidelines for an exit interview program.

Sales and Marketing (16)

- Describe and explain how to target market segments typically served by a catering operation.
- Identify strategies in developing a marketing plan.
- Identify elements of the sales forecasting process.

Certified Professional Catering Executive (CPCE) Recertification Requirements

Application requirements include the achievement of 60 points over a total of (5) five years from the date of your initial or last recertification date. **Documentation must be included** to receive points. Points may be earned as outlined below.

Application Procedures

Complete the application form in its entirety.

- ✓ Submit a typed application form. (Note: You may type directly on the form). **Handwritten applications will not be accepted.**
- ✓ Make a copy of the completed application for your records.
- ✓ Mail the completed application and full recertification fee to **NACE, 9891 Broken Land Parkway, Suite 301, Columbia, MD 21046** or fax credit card payments to **410-290-5460**.

Employment Experience in Catering or Event Management (*maximum of 5 points*)

CPCEs who continue to work in the industry on a full-time basis will earn points in this area. Please include job title, description of job responsibilities, organization, and employment dates **since your initial or last recertification date**. Also, please attach a copy of your resume as documentation.

Formal Education (*maximum of 10 points*)

CPCEs who have completed an undergraduate or graduate degree in hospitality management or related fields **since their initial or last recertification date** may earn points in this area. Please list school name, address, degree and date issued. **Documentation must be included** (e.g., transcript, diploma, etc.).

- Associates Degree in hospitality/event management or related fields of study
- Bachelor's Degree in hospitality/event management or related fields of study
- Master's Degree in hospitality/event management or related fields of study

Continuing Education in Catering or Event Management (*maximum of 50 points, 1 point for each hour of continuing education*)

CPCEs who have completed continuing education in any of the areas below **since their initial or last recertification date** are eligible to receive 1 point per hour of training. **Documentation must be included and should include how many hours of educational instruction you received** (copies of certificates or letters on official letterhead).

- Company/organization sponsored continuing education or training
- Local professional development (including certificate programs)
- NACE (chapter educational programs, Experience! Conference, Leadership Summit)
- Allied association education programs
- Online training

Industry Memberships (*maximum of 10 points, 1 point per year*)

Please list name of organization and years as a member **since your initial or last recertification date**. **Documentation must be included** (e.g., letter from organization (on official letterhead), copy of membership certificate(s)/ card(s) or proof of payment(s)).

Accepted Industry Memberships

- American Culinary Federation
- American Hotel and Lodging Association
- American Society of Association Executives
- Association for Convention Operations Management
- Association of College Conference and Events Directors
- Association of Destination Management Executives
- Hospitality Sales and Marketing Association International
- International Special Events Society
- Meeting Professionals International
- National Association of Catering Executives
- Professional Convention Management Association
- Other industry membership and leadership positions (based on acceptance by NACE)

Leadership Positions (maximum of 10 points)

CPCEs may receive points for leadership positions held at the national or chapter level **since their initial or last recertification date**. The organization must be related to the catering or event management industry and your **term must be completed** by the date of your application submission. **Documentation must be included** (e.g. an appointment letter (on official letterhead) or certificate of recognition).

National Role	Points
Officer of Board of Directors	6 per term
Board Member	5 per term
Committee Chairperson	4 per term
Committee Member	3 per term

Chapter Role	Points
Officer of Board of Directors	4 per term
Board Member	3 per term
Committee Chairperson	2 per term
Committee Member	1 per term

Professional Achievements (maximum of 10 points)

The achievements must have been completed **since your initial or last recertification date**.

Documentation must be included as proof of completion (e.g., articles, certificates or letters on official letterhead).

- Seminar presenter (2 points)
- Seminar Panelist (1 point)
- Teacher, facilitator/trainer or instructor (2 points per class, maximum of 10 points)
- Certifications or recertifications (2 points per certification/recertification)
 - CAE, CHME, CMM, CMP, CSEP, etc.
- Awards/recognition for professional accomplishment (2 points)
- CPCE Study Guide contributor (5 points)
- Author of professional article (2 points per article)
- Author of chapter in book (5 points)

- Book author (10 points)

NACE Support Activities (*maximum of 10 points*)

Activities that receive points in this area are part of the responsibilities of NACE national or NACE chapter leaders and/or committees. **Documentation must be included.** Activities must have been completed **since your initial or last recertification date.**

- CPCE examination proctor (1 point per occurrence)
- NACE recruitment booth (1 point per occurrence)
- NACE related community service (1 point per occurrence)
- CPCE Study Group leader (7 points per group)

Certified Government Meeting Professional (CGMP) – Society of Government Meeting Planners

The Certified Government Meeting Professional designation ("CGMP") is designed for planners and suppliers whose work is governed by the rules and regulations of the federal government. Individuals who have earned their CGMP have obtained the highest designation available that is specifically for government meeting professionals.

The content for this program assumes that you have worked in the meetings management industry for at least one year and have a basic knowledge of industry terminology and acronyms. The course teaches recognized industry practices cited in the Convention Industry Council (CIC) Manual.

Certified Government Meeting Professional (CGMP) Body of Knowledge/Core Competencies

Included in the course material are 19 lesson plans with specific and thorough instruction on ethics, federal budget and appropriations, acquisition and contracting, federal travel regulations, RFPs, risk management and protocol:

1. Management & Coordination
2. Goals & Objectives/Program Development
3. Federal Travel Regulations
4. Ethics
5. Writing the Request For Proposal (RFP)
6. Site Selections & Negotiations
7. Meeting Logistics
8. On-site Logistics
9. Marketing & Promotion
10. Sponsorships
11. Registration
12. Reservations
13. Program Materials
14. Speakers & Press
15. Special Events
16. Federal Budget & Accounting
17. Creating a Budget
18. Acquisition & Contracting
19. Risk Management

The exam covers all of the course content in the course manual.

Certified Government Meeting Professional (CGMP) Recertification Requirements

Continuing Education in Government Meetings

In order to maintain your certification, you are required to complete 15 hours of SGMP related training over three years through attendance at chapter meetings, coursework completed through participation in the National Education Conference or the CGMP Congress. These 15 hours may be earned over any time within the three years.

Connecting with the SGMP Community

Part of being a Certified Government Meeting Professional involves being engaged with the Society of Government Meeting Professionals. You are required to do at least one of the following each year:

1. Attend one (1) chapter meeting
2. Participate in a chapter or national task force or committee
3. Write one (1) article for Government Connections

Professional Accomplishments

You may update your profile on the SGMP member directory or you may update your resume and submit it with your application.

Certified Travel Industry Executive (CTIE) – The Travel Institute

To earn the CTIE, travel professionals must:

- Possess at least 5 years of full-time industry, management, or business experience
- Complete a 2000-3000 word White Paper
- Commit to annual certification maintenance to retain certification
- After certification, commit to annual Travel Institute membership

Certified Travel Industry Executive (CTIE) Body of Knowledge/Core Competencies

The coursework's focus is on

- Leadership
- Management
- Communication
- Customer Service
- Sales/Marketing

CTIE candidates write a White Paper on a topic of their own choosing

Certified Travel Industry Executive (CTIE) Recertification Requirements – Not published as of February 2013