

Understanding the roles of the meetings  
and education departments can  
help you reach objectives as a team.

# Learning versus Logistics

**BY KATHLEEN M. EDWARDS, CAE,  
PATRICIA FOSS, CAE,  
SARAH FANGER, CAE, AND LORI FEINMAN**

"Theater-style seating in this workshop just won't work; the speaker is going to do some interactive exercises and needs people seated in rounds."

"The specs were sent to the convention center already; I can't change the room set for one session."

"Doesn't the program value for attendees outweigh a few dollars for a set change?"

"You had plenty of time to let me know how you wanted the room set."

"Your deadline was three months ago! The speaker didn't start designing her program until last month. And she's donating her time; I don't want to push her too hard. Can't we just move the session to another room since it needs a special set?"

"No, all the space has been allocated. The speaker will just have to live with it."

"But what about the audience's learning needs?"

In associations with separate meetings and education departments, such dialogue can be all too commonplace. Yet it's possible to understand potential areas of conflict, establish and maintain productive working relationships, and share joint responsibility for creating effective association programs that meet members' needs.



**Whether you're in an ongoing difficult situation or have a new position and want to start on the right foot, it's possible to create and sustain an environment of cooperation and mutual support.**

Separate departments are most common in larger associations, allowing staff specialists to focus on their areas of expertise. However, these specialists must not ignore the roles, challenges, and responsibilities of their counterparts in the other department. To do so sets the stage for major conflict that can undermine staff effectiveness and perhaps even compromise event quality.

Problems can occur when larger departments are split up; there are overlapping projects and responsibilities; there are unclear expectations; or there are differing ways of operating. Poor communication and lack of teamwork exacerbate these problems.

The first step in resolving conflict is figuring out why it occurs. There are legitimate reasons for conflict between education and meetings staffs that can be as basic as individual personality differences. However, nine key areas are almost universal. (See sidebar, "What Causes Conflict Between Departments?") The success of association events can hinge on how you resolve conflicts. Whether you're in an ongoing difficult situation or have a new position and want to start on the right foot, it's possible to create and sustain an environment of cooperation and mutual support.

**Take the initiative.** Sometimes it seems like we're back in kindergarten...it's always the "other side" that is acting childish or putting up roadblocks. Before anything can be accomplished, everyone needs to grow up, be professional, and learn to play well together. Recognize and accept that you all have responsibility for a successful outcome, no matter whose job it is to get things done. Event out-

comes reflect on the entire staff, and members don't really care who was supposed to make appropriate arrangements.

**Understand and focus on association and event goals.** Without clear, mutual goals, the stage is set for conflict. We can't focus on learning to the exclusion of logistics and budget, and we can't focus solely on the bottom line without compromising the experience for participants. Understand how events and learning opportunities contribute to overall organizational goals. Make sure individual event goals—revenue, learning, satisfaction, member service—are clearly stated and understood. Better yet, create event goals together to ensure that they contribute to the association's strategic plan. By working together to create the goals, you create staffwide ownership and desire to excel.

At the Produce Marketing Association (PMA), Newark, Delaware, the convention and meetings group uses its creativity and sense of fun to focus the entire staff's attention on the annual meeting. When the event was in New Orleans, for example, the group organized a Mardi Gras party (complete with king cake, beads, and feathered masks) for the entire staff.

**Walk a mile in my shoes.** When we've walked the proverbial mile in one another's shoes, it should be natural to become the other person's advocate. Sometimes all it takes to reduce conflict is to talk constructively about experiences, goals, challenges, and responsibilities. A conversation focusing on what both parties contribute to the event usually results in the realization that everyone wants to do a

good job and produce an exceptional program for members.

**Define responsibilities clearly.** Job responsibilities in both education and meetings constantly put staff in positions of potential overlap with one another. We share vendors and contractors, and we report internally and to our volunteer committees. Surviving the territory trap requires planning—a skill we should have in excess. Together, decide who communicates what, when, and to whom. Spell out responsibilities, particularly when both departments need to work with the same vendor, to ensure that nothing slips through the cracks. Make sure you speak with a unified voice and don't publicly contradict each other. Decide in the early stages of planning how to share team wins and losses.

**Learn to be flexible.** Just because you've "always done it that way" doesn't mean there isn't a better approach. All staff, particularly new hires, can bring a wealth of ideas, energy, and new experience to an organization. If those ideas invariably meet with resistance, the organization is missing out on a lot of possibilities.

As you learn to work better together, agree to at least explore the possibilities that new ideas represent. Look for ways to balance experience with innovation, and celebrate creativity. You never know when a "what if" will turn into a great new program. Ideally, every organization should encourage all of its employees to take some risks. No association can afford to be static in today's environment. If you don't offer something new, someone else will.



**Communicate.** Lack of effective communication is frequently the culprit when conflicts arise. Poor communication not only creates problems, it can sabotage success. Serious effort to improve communication between the parties must occur.

First, discuss and identify areas of conflict. Can you suggest and implement long-term solutions? Also look for short-term solutions, or simply operating understandings. If the differences are too deep, consider bringing in someone from another department to provide a fresh perspective. The conference and education departments at one association asked the chief financial officer to assist when they couldn't determine how best to allocate expenses and revenue for a joint event. After listening to the disagreement's history, he suggested a simple, equitable solution that quickly put the issue to rest. All of the revenue and expense went in the budget for the department holding primary responsibility—conferences and expos—and 25 percent of the net revenue was transferred to the education department at the end of the year. This simple solution never occurred to either department.

To facilitate effective communication, cross department lines to set up event teams. Include representatives from any department involved in planning the event: marketing, education, meetings, exhibits, and others. Have regular meetings (in person or via e-mail) to track progress and discuss challenges. Update the staff regularly about the event's status.

To help improve staff communication, the American Society for Microbiology, Washington, D.C., adopted the idea of NETMA meetings from the San Diego Convention & Visitors Bureau staff. These "Nobody Ever Tells Me Anything" meetings are a regular free-for-all in a forum where everybody listens and participates.

**Address challenges together.** No single person has all the answers. In event teams or one-on-one settings, consider your individual expertise to determine how you can personally

contribute. When combined, different perspectives can create something new that neither of you would have thought of alone.

**Debrief every event.** After every event, get the event team together to explore what worked and what could be improved next time. Don't dwell on what didn't work or attempt to place blame. Focus instead on improvement; every event is a learning lab for the next one.

**Develop a culture of respect and teamwork.** Staff culture can certainly play a role in conflict. Invest in some staff-wide team training with an outside consultant. Consider creating your own team norms or guidelines for working together. Brainstorm ideas with the full staff: What makes a good team in your organization? What things do you value in working together? At PMA, the team norms include always assuming that people

have good intentions. Another is that staff work toward communicating and listening with respect, integrity, openness, and without fear of reprisal. Building a culture of respect and teamwork may not be easy, but it can reap myriad rewards.

**Use the moose if necessary.** The "moose" represents the problem you can't ignore, the stinking carcass that gets in the way of working well together unless you confront it. Take complaints (the moose) directly to the source who can do something about it; don't complain in the hallway to your other colleagues.

A department within PMA adopted the idea of the moose and ran with it. Everyone on staff received a little stuffed moose with a brief poem exhorting us to say what we think and "do it with kindness, do it with tact...and we'll all benefit when we deal with the facts." Another of our team norms is "issues and concerns

WE'VE GOT THE GREATEST PARTY LOCATIONS IN THE WORLD.

studio locations, movie sets  
and stages special event sales

- 28 backlot movie sets and a dedicated sound stage for special events
- movie props, costumes and set lighting

818.777.9466

experience universal

universal studios hollywood  
special event & convention sales

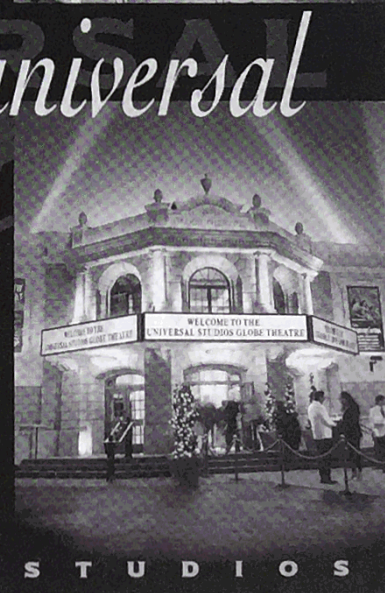
- Universal Studios Globe Theatre, a 9,600 square foot, indoor, state of the art special events venue
- theme park locations

818.622.3036



www.universalstudios.com

U N I V E R S A L S T U D I O S





are taken directly to the person with whom there is an issue." *Moose* is now a common term within the organization when someone has an issue, as in, "I've got a moose with you." Staff members use the moose to raise issues, which improves how problems are solved.

#### **Start slowly and celebrate successes.**

Take small, regular steps toward a common goal of cooperation, support, and respect. Every event is really a team effort—no one person does it all regardless of the association's size or the meeting's size. Create ritual

around celebration; have a small party for all staff (even staff who stayed behind to hold down the fort). Publicly recognize individual and team efforts that go above and beyond, and have fun doing it. When you acknowledge people for their work, it cements relationships and commitments to future collaboration.

When you make the effort, your two departments can become a sterling example of how working together creates a better professional environment. Earnie Larson once said, "It is not our willingness to do something that makes a difference; it

is our willingness to do what it takes." Be willing to do what it takes, and you'll reap the rewards. **AM**

*Kathleen M. Edwards, CAE, is former director, learning strategies, and Patricia Foss, CAE, is director, conventions and meetings, at the Produce Marketing Association, Newark, Delaware. Sarah Fanger, CAE, is the former seminar manager, ASM International, Cleveland. Lori Feinman is assistant director of meetings, American Society for Microbiology, Washington, D.C. E-mails: kmmedwards@earthlink.net, pfoss@mail.pma.com, medleyville@aol.com, lfeinman@asmusa.org.*

## What Causes Conflict Between Departments?

The following nine factors often create logistical problems when association education and meetings departments work together. If you are aware of the issues that have potential to cause conflict, you will be better prepared to overcome obstacles and build a workplace that supports cooperation and mutual respect.

**1. Experience.** Some staff members start out as generalists in smaller associations and have experience in both the education and meetings arenas. They think they know the best approach and have a natural tendency to offer their opinions. Their previous experiences affect their expectations of others who now have those responsibilities.

**2. Opposing or unclear goals.** It's easy to lose sight of the big picture with your own narrower focus. The education team has learning objectives. The meetings department has a bottom line it must meet. The goal, though, is really the same: to meet members' needs.

**3. Communication.** Deadline pressures, diverse experiences and backgrounds, and age and style differences can all contribute to communication challenges between departments and individuals within those departments. It's not easy to respond positively to a colleague whose communication style you don't share or understand.

**4. Inflexibility.** When someone has held the same job for years, that person has a natural tendency to avoid changes. It's easy to say, "We've tried that before, and it failed," or, "We've always done it that way."

**5. Territory.** Meetings and education departments work on the same events and, in doing so, risk stepping on each other's toes. At times, both departments need to give direction and information to contractors and vendors. Both departments need to communicate with other association staff. When an event meets or exceeds expectations, both departments want the credit. Conversely, if an event has obvious flaws, no one wants to take the blame.

**6. Association culture.** One department may feel that it's more important to members than another. Department silos can prohibit clear and effective communication. One supervisor may have more perceived power than another. An unhealthy staff culture, including competitiveness among individuals and departments, can create significant barriers to cooperation.

**7. Association structure.** Association structures can be vastly different. Some organizations have clearly delineated lines of responsibility and reporting, while others operate in cross-functional teams. Who reports to whom can impact effectiveness. If responsibilities are blurred, tasks can either fall through the cracks or efforts can be duplicative. A committee's or board's relationship with staff can further complicate the issues.

**8. Conflicting priorities and pressures.** Meeting the audience's needs is the priority for all departments. But it can be difficult to balance space and budget realities with learning objectives and creativity. For example, planners are under pressure to maximize use of space, but speakers need flexibility to meet learner needs.

**9. Generational issues.** It's becoming increasingly recognized that differences among generations require greater understanding in the workplace. Each generation views life and work from a different perspective, potentially setting the stage for conflict.