APEX: Helping Meeting Professionals Evolve & Adapt to a Continually Changing Work Environment

In the fast-paced world of meetings and events, the ability to work smarter, stay aware of trends, and adapt to change is critical to the success of all meeting professionals. CIC’s APEX initiative offers essential resources for accomplishing this.

First launched in 2007, APEX promotes the development and implementation of industry-wide accepted best practices. Since its inception, the APEX Standards Committee has created over 25 best-practices documents that can save organizations time and money, streamline processes and deliver better results. With its focus on current and emerging trends and issues, APEX continues to help the industry adapt to the constantly evolving landscape of meetings and events.

The APEX volunteer committee accomplishes its work through the proven APEX workgroup model, which brings together a diverse cross-section of stakeholders to conduct research and devise knowledge-based responses to issues affecting the industry. In recent years, APEX has helped the industry get “up to speed” on bandwidth and, in conjunction with the American Society for Testing and Materials International (ASTM), published a complete suite of standards for sustainable meetings and events. The committee has now turned its attention to room block poaching and electronic eRFPs.

The results from a survey of meetings planners conducted by the CIC in the spring of 2014 revealed that there is a wide range of professionals and organizations concerned or affected by the issue of room block poaching. Surprisingly, over 70% of those surveyed were directly affected by the issue, yet 70% also didn’t have any practices in place to deal with it. The results motivated the workgroup to begin developing best practices and resources to help meeting professionals understand and manage this issue.

The eRFP workgroup is also currently in the middle of a research project exploring eRFP usage behaviors in order to develop recommended practices for getting the best results out of these systems. The workgroup’s research team is interviewing corporate planners, procurement managers, third party vendors, and others to gain a breadth of knowledge for the industry and to guide future work.

As our industry continues to evolve and the issues affecting many aspects of the profession become more apparent, APEX looks to continue its research to adapt with the changing times. With a focus on communicating its knowledge in practical and applicable terms, APEX volunteers are looking ahead at other future trends while continuing to create content on current topics.

by Arcynta Ali Childs, Program & Community Manager
CONVENTION INDUSTRY COUNCIL

The PCMA Capital Chapter is where “You Belong”!

Mission: The mission of PCMA and the Chapter is to be the leading organization for meeting and event professionals by delivering superior and innovative education and promote the value of professional convention management.
Every day we follow the rules of our organizations. We operate in a myriad of procedures, paperwork and forms not to mention legalese and meeting protocols. "Robert’s Rules of Order", anyone?

Standard Operating Procedures (SOPs), forms and paperwork are created as an organization’s best practice to have order and consistency in the workplace. These create the “box” that we are daily challenged to think outside of. It is, however, how we personally manage all of this that helps us to create our own Best Practice for success in our organizations and our lives.

Our individual work ethic, the daily management of our hectic schedules, responding timely and efficiently to each other, putting the right things out there on social media, represents, whether we know it or not, our own personal Best Practice SOP.

Our wonderful hospitality industry has great Best Practices; for example, where else do you hear “My pleasure” as a response to “thank you”. Over and over again I see that response have a positive impact. It’s extremely simple but nothing done well is too small to be effective.

Whether you are a planner or supplier we spend a lot of time creating Best Practices for our organizations. After every convention or meeting we ask ourselves, “How can we achieve something better for our members or customers for next year?” As an industry we create white papers and position statements and policy briefs. The CIC has done a wonderful job creating industry standards. All of this is done to create benchmarks for us to measure ourselves and set the bar for Best Practices in our industry.

We need all of this to be successful in our organizations. Attending industry events, reading publications and industry newsletters helps us stay fresh and learn new things to create benchmarks for us to measure ourselves and set the bar for Best Practices in our industry.

Abraham Lincoln said, “I do the very best I know how, the very best I can, and I mean to keep on doing so until the end.” I think Abe did a good job at setting that bar! What is your personal Best Practice? •
Did you feel that kinetic shift when you entered our atmosphere? Don’t worry, the earth’s gravity hasn’t changed—but everything else has. The Long Beach Convention & Entertainment Center has tilted event planning on its axis with new dimensions of intrigue. Featuring mind-blowing light and sound capabilities and interconnected venues that flow seamlessly from one to another, LBCEC offers a true campus experience like no other special event center on earth. Visit sightsoundlbc.com to see where connection happens.

Long Beach Convention & Entertainment Center’s six unique spaces—from sleek to laid back cool.
What Makes a Great Site Visit?

Clients and I recently experienced a site visit after which we found ourselves wishing this venue and its partners would teach site visit classes. Communicating my experience with other planners, they shared their unforgettable sites and I noticed common threads.

Questions… In all cases, the venues asked detailed questions prior to the site visits in order to have a thorough understanding of the program, the attendees and something about the planners to add personality. The venues catered the sites to the group, focusing on what was important and omitting amenities that held no group value.

Team Work… When a CVB, the venue with staff and the “locals” orchestrate a site visit that’s completely in tune, you know your group is in great hands. Visit Columbus nailed it when their welcoming committee (with mascot) lined up to greet planners, each person thoroughly familiar with the program and ready to answer planner questions. Via minibus they toured the area, showing venues that would be an intricate part of the conference experience.

Details and Creativity… Make it fun and meaningful. The organizers loved baseball so the Omni SD created a baseball themed site with ballpark snacks in meeting and guestrooms and monogrammed Jerseys as parting gifts. NRA had a follow-up site in Houston and was served wild game for brunch with firearm buffet decorations. In lieu of typical conference packets, the Newport Beach Marriott presented personalized binders, sectioned to include proposal, a color-coded legend of the proposed space, hotel/environmental and destination information. Convention Services and PSAV were stationed in the Ballroom, prepared to answer meeting and internet questions and the valet thoughtfully left a thank-you gift bag on the car passenger seats.

Knowledge… Joan Eisenstodt reminded us in a recent webinar that great site visits should start with the planner, a thorough RFP and the important questions to ask. It goes beyond rates, dates and space, and should especially address the safety and security of attendees, accessibility (air, ground, hotel), bandwidth (speed, pricing), staffing, airwall privacy, sustainability and corporate social responsibility. Joan encourages us to know what we’re buying, how it will perform, and to take the proper steps to get what is promised during the site.

by Marilyn Atchue-Zuill, Global Account Director, HPN Global
The Colorado Convention Center’s 40’ Blue Bear, I See What You Mean, by Denver artist Lawrence Argent, has become a Mile High City icon.

You know getting to Denver is easy. But you might not know that starting in 2016, our new rail line will add a quick, affordable way to get from the airport to downtown, putting you in the middle of the city in no time flat. Think you know Denver? Think again. We dare you to see the city in a whole new way at TruthOrDareDenver.com

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ARRIVE AT A LEMON DROP MARTINI IN UNDER 35 MINUTES.
Conference Kits: Preparing to Be Onsite at Your Conference

I've often wondered what other planners pack to prepare for their conferences, so I asked colleagues to tell me about their “conference kits” and got back some really interesting answers. I found that kits come in all shapes and sizes and I learned a few great tips along the way!

Here are some interesting findings from our colleagues. Mas Tadesse Harris with American Public Human Services Association has a kit with almost 50 items and includes: glue, a laminator, box cutters, manila folders, and a label maker. Her most important item, however, is Purell hand sanitizer. Harris said “I used to come back sick after each conference. Hand sanitizer makes a huge difference to me.” Alyssa Kolat with National Rifle Association also found sanitizer important and also packs a sizable kit for her conference including; moleskin bandages, and smaller personal items like nail clippers and nail polish remover. Kolat feels that “The best time to purchase these items is during the holiday season when manufacturers come out with stocking stuffers; this is key!”

Some other planners had a much shorter list, and some had no prepared conference kit at all. In my personal experience, a conference onsite kit is a MUST. In fact, I have a very large rolling tool box from Home Depot that I keep all of my items in year-round. My basic suggested items are: reams of paper, a small printer, staples/stapler, dry erase markers, highlighters, paper clips, rubber bands, lockable money bag, extra lanyards, a small sewing kit, a Snickers bar or two (for you or people that have emergency low blood sugar), a general first aid kit, and maybe a bottle of wine. I am kidding on the last part.

Any way around it, I believe that a prepared (and pre-shipped) conference kit makes for a happy conference team onsite. The kits make our lives easier and ensure that we don't always have to rely on others when we arrive at an event. We are the ones to be relied on, and being prepared is part of our job description.

Managing Speaker Expectations

“Why did the opening keynote do a breakout after his/her presentation while the day two keynote left right after their presentation?”

“I really like when the speaker does a book signing after the keynote, why don't they all stay?”

These are just a few questions that are normally asked about speakers when they are on-site at an event. There are many different reasons speakers do what they do, but how do you manage your expectations when you are at your event?

I don't think you should have to manage your expectations. The speaker is at your event to serve their client, you the meeting professional, and the audience. At the same time, I don't believe a speaker with a sparkling personality is a must in order to be a great speaker. How many times has the speaker been difficult in the green room, but killed it on stage? Does it help if they are great on and off the platform? You betcha!

The key is to lock up, in writing, everything you want from the speaker before they are even at the event. Be SUPER DETAILED when it comes to the contract, the same detailed approach you take with hotels, AV, F&B, etc. This way the speaker will do everything you want and more because they are contracted to make it happen. Speakers come in many shape, sizes and personalities. Take the wild card factor out of the equation by getting everything you want before the speaker arrives for your event by ironing out all the details in the contract. •

by Carrie Abernathy, CMP, CEM, CSEP
Director of Education, Training & Events, Practice Greenhealth

by Timothy D. Mathy, Senior Partner, SpeakInc

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Sally Noona, CMP
Dawn Whittaker
The 411 on 911 – Crisis Planning from my Recent Convention Experience

Here we go again. That was the thought that entered my mind when I woke up on a Friday morning in late September to the sound of a television announcement chronicling a fire at an air traffic control center in the Chicago area. The fire resulted in the delay and cancellation of flights in and out of Chicago where my organization, the National Electrical Contractors Association was slated to start its annual convention that weekend.

Fortunate or not, I know a thing or two about facing challenges at conventions. NECA had conventions in Washington, D.C. in 2001 (shortly after 9/11) and 2013 (government shutdown) and New Orleans in 2005 (after Hurricane Katrina). What I’ve learned is, the key is to get the word out as quickly as possible and as some might say, “the show must go on.” And it did.

Conventioneers traveled in planes, trains and automobiles – and in some cases, more than one – to Chicago despite the travel difficulties. Some decided to fly into other cities and drive the rest of the way. They did what they could do to get there. We had people who truly didn’t give up. They made it work. And we had a very successful event as a result of our attendees’ perseverance.

We were fortunate that only one exhibitor had to pull out of the trade show because of the fire. (There were more than 280 exhibitors on the show floor.) Roles and responsibilities had to shift to account for delayed staffers, but everything remained on track. Our employees deserve a lot of credit for staying flexible and covering for each other throughout the convention. Some practical advice to share is I strongly recommend purchasing cancellation insurance. Don’t book a convention without it. It’s important to never forget to expect the unexpected. Anything can happen – before, during or after a convention. Thankfully, with our partners, attendees and members working together, a solid communication plan, event insurance and flexibility, NECA’s 2014 Convention was a success. You never know what’s going to happen so as meeting professionals and suppliers, we have to be prepared for anything.

by Beth Ellis, Executive Director Convention-Exposition, National Electrical Contractors Association
Communication Best Practices

We live in a world today where everyone is able to communicate seamlessly. Our lives have become so convenient that we've almost forgotten how to truly speak to each other. We've incorporated the daily use of cute little acronyms like “lol,” “smh,” “Idk” and “wyd.” These acronyms have become our main stream responses or statements. We even added smiley or sad faces at the end of sentences so that the recipient knows the emotion attached to our correspondence.

There is, however, a time and place for one to apply themselves when it comes to communication. And that is in the workplace. As professionals, we should do our best not to allow the lines of communication to become blurred with the flourishes and conveniences that we enjoy with our personal communication.

I'm sure we could all benefit from revisiting proper communication etiquette in the workplace. Some of my favorite golden rules and best practices are:

- Be brief (most people only read two to three paragraphs of what you write)
- Be concise
- Be clear (don't go off on a tangent or over explain things)
- Avoid acronyms, slang and jargon
- Remove emotion (avoid using trigger words or phrases that make what you are saying personal)
- Proofread (read it to yourself and make sure it makes sense)
- Spell check (always, always use spell check...AND grammar check too)
- Avoid long winded sentences and big words
- Drafts are your friend (don't be afraid to do a draft letter or email and come back to it at a later time and edit it)
- Start every communication off with a greeting such as Dear, Good Morning, Good Afternoon etc., even if it's just email (you never know who is forwarding your email and to whom).

As we all wait for the latest gadget or gizmo to make our life simpler (or more complicated), may we all make a concerted effort to continue to communicate more effectively and professionally with each other. lol!

by Rene McCoy, Director of Group Sales, The Westin Alexandria
Best Practices When Meeting in Canada

Although I represent just one province within Canada, I’m often asked what the best practices when planning meetings in Canada are. There are a number of terrific programs Canada offers that groups should take advantage of.

Canada’s International Events and Convention Services Program (IECSP) – This program managed by the Canada Border Services Agency (CBSA) facilitates movement of goods and attendees to Canada. Work through your CVB to connect you with that region’s dedicated IECSP regional coordinator. The coordinator will require basic details about your meeting (where it will be, when, how many people, etc.) to determine if your meeting qualifies for foreign convention status (75% of attendees must be non-Canadian). You will be issued a letter of recognition that attendees should provide to Canadian border agents upon entry. The letter of recognition will also accompany goods shipped and provided to your customs broker. The IECSP is also the starting point to determine if freight can be cleared on-site at the hotel or convention centre, if it needs to be cleared outside standard hours, and more. Apply for the IECSP 1-2 months before your meeting.

Use a customs broker licensed by the Canada Border Services Agency – It is important to use a customs broker licensed by the CBSA. This will ensure your broker is an expert on Canadian laws and requirements. I recently had a group that did not use a Canadian broker which resulted in delays. There are numerous brokers with representatives on the ground in most major cities such as Mendelssohn Event Logistics, North American Logistics Services and Events on the Move. Ask your CVB partner for recommended brokers.

Foreign Convention and Tour Incentive Program (FCTIP) – Some conventions may qualify for a tax rebate. This is a program managed by the Canada Revenue Agency. Talk with your CVB regarding the process.

As always work in partnership with your CVB and Business Events Canada (BEC)! They are your partners with the knowledge and expertise on these programs and other tips to execute a successful meeting in Canada! •

The Decision is in Doing Your Homework

The Philadelphia Convention and Visitors Bureau (PHLCVB) has been working with their hotel community to better understand buying trends and the key factors for meeting planners and organizations in selecting the right destination and the right facility to achieve the organization’s goals. At the summit, round-table discussions included: factors planners consider when choosing a destination, effects of new inventory on room blocks, and successful hotel site inspections.

Factors impacting choosing a destination can be effectively managed and addressed by an informed sales team. Some of those factors include: flow of meeting space, ease of logistics, walkability, safety and security. The sales team should discuss how the destination can impact the goals of the organization, what assets they have to offer that will attract more attendees and exhibitors and how they can provide a greater ROI for the meeting. A united destination of CVB, convention center, hotel, local government and local businesses is the key to addressing an organization’s needs.

A site inspection can truly impact a planner’s decision to add a destination to the short list or even to book the destination. It’s important for the sales team to do their homework. Browse the web to learn about the organization, the needs of the attendees and the needs of the convention.

The destination has been selected, the convention center is confirmed, and therefore, the next focus is the hotel package. If a new hotel is built near the convention center it is important to have it in the block to save on transportation budgets for the meeting planner. Hoteliers who are already contracted with an organization when a new build arises, will need to be proactive in speaking with the planner and determine if rooms contracted will actualize, if the room block should be reduced, or if backing out of the package will be necessary.

If you were to ask PHLCVB the theme of this particular DOS Summit on how decisions are made, they would respond, “have knowledge of the specific convention, the organization and the planner.” As we tell our children today, be smart, do your homework. •

by Kyla Knudson, CASE, CIS, Travel Alberta

by Mariana Gallo

Vice President, Client Development, IMN Solutions
The Power of Checklists

Who among us couldn't use a reference guide to insure events and meetings go off without a hitch? Checklists detail the best ways to accomplish projects. Airline pilots rely on them from pre-flight to landing the plane. Health Care professionals use them to make certain they consider every option, especially in life-saving situations. Where one omission can cause disaster, a listing of tasks, steps, best practices and protocols is essential.

Checklists promote excellence. Skipping a step might lead to an occurrence where the name badges or signs are forgotten. With a list, when steps are completed there is a feeling of accomplishment and readiness.

Making checklists is a great benefit for your staff. For staff, some projects may seem overwhelming. To achieve the results, the adage, “when eating an elephant – take one bite at a time,” promotes breaking big jobs into small tasks. A checklist facilitates a team approach to working toward desired outcomes. The checklist is a powerful tool for showing employees why steps must be completed in sequential order.

Other benefits of a checklist:

- Nothing is overlooked or forgotten.
- Steps are completed in the proper order.
- Any member of the staff can step in to help.
- Complex processes are transformed into smaller tasks.
- Continuous improvements occur as the better practices are implemented.
- The speed for completion is increased.
- Promote consistent sustainability by leaving a list for future employees to follow.
- When creating a checklist, start by identifying the desired project or outcome. In an association or chamber it could be a conference, newsletter, board meeting or nomination process. To create a checklist, consider “reverse engineering”. Reverse engineering is the process of taking apart a project to see how it works or was created in order to duplicate it.
- Identify the processes that are components of the desired result.
- Don't micromanage the list; detailing every task will turn off creative processes of staff.

Develop the lists as a team, seeking input from departments and individuals to have a comprehensive approach.

1. Enumerate tasks or use boxes that can be checked off upon completion.
2. Leave space to make notes about ways to improve problem areas.
3. Include the vendor and contact names, phone and email to save time the next time the program is implemented.
4. Keep the list accessible by adding them to a procedures manual or a shared computer drive.

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by Bob Harris, CAE, President, Non Profit Center
Your Professional Development, Growth and Success is Solely Your Responsibility...NO ONE ELSE’S!

Seems a little harsh doesn’t it? Don’t let the harshness of the title diminish the fact that we are in a great industry filled with people who want to help you grow, develop and be successful both personally and professionally.

As a professional, it is ultimately you who is responsible for your development, growth and success. Remember, responsibility is different than supporting, assisting and mentoring. A good employer is going to do the latter…but only if you take the first step and show them your desire to take ownership and accountability for your own actions. For the purposes of this article I am going to provide you three areas of accountability to think about:

1. YOUR GOALS
   - Health
   - Family
   - Financial
   - Spiritual
   - Community
   - Career

There is a reason I mentioned YOUR GOALS first. For you to be successful you must first be happy and know what you want for yourself.

2. YOUR CHOICES
   - How do you communicate with others
   - Your manners and behavior towards others
   - How do you respond to adversity
   - Your attitude and thoughts

Every choice you make defines you, shapes you and lays the foundation for your future. Let me be very clear, the right choice is not always easy, is not always clear…but it is always worth making.

3. YOUR RESPONSIBILITIES
   - Doing what you agreed to do
   - Returning calls, text, and e-mails in a timely manner, being on time for appointments, calls, and projects
   - Being a good steward of organizational resources
   - Stay focused on your job and say “no” more often

Responsibility is not something you decide to do once in a while, it is a way of thinking, being, and living your life professionally and personally.

Now back to your development, growth and success. If you are clear with your goals, you make choices based on the information available to the best of your ability. Take 100% responsibility for your actions. Surround yourself with people inside your organization, our professional community and your personal life that will mentor you, push you, guide you and, when needed, carry you.

Taking Care of Yourself: Best Practices for Personal Health

Re-booting your conferences to finish up your year strong starts with a strong and healthy self. Best practices for our bodies are important for bone health, brain health and disease prevention.

Brain Health - Diet and Nutrition:
- Keep a balanced diet for energy that includes: ¼ starch, ¼ protein and ½ vegetables per plate or meal.
- Eat regularly to sustain energy and focus
- Consume complex carbohydrates (vegetables, legumes and whole grains) that provide lasting fuel for the brain
- Include protein in your diet to enhance mental alertness (at least 2 servings of fatty fish weekly; eat legumes instead of meat one day a week)
- Include unsaturated fat (nuts, olive, coconut and avocado oils, salmon, avocados, chia seeds) to build healthy brains
- Incorporate nutrient-rich superfoods to improve memory, energy and alertness

Exercise for Disease Prevention:
Incorporating fitness into busy lives and business travels is always a challenge. However, consider that the benefits of exercise (increase cardiorespiratory fitness, strength and flexibility; improved posture and balance, mental health, and quality of life) far outweigh the risks of disease (heart disease and stroke, adult-onset diabetes, obesity, osteoporosis, cancers, alzheimer’s disease).

Best Practices for Health-Related Fitness Include:
- Aerobic activity 3-5 times per week (power walking)
- Strength / resistance training 2-3 times per week (using weights, resistance bands or your own body weight to do push ups, squats, triceps dips, etc.)
- Balance / core training 2-3 times per week (tai chi, yoga)
- Stretches to improve posture / flexibility 2-3 times per week

Enjoy some of the latest fitness trends: H.I.I.T. (High Intensity Interval Training), boot camp, yoga, pilates, piloxing, ballet barre fitness, dance fitness classes, and nordic Pole Walking.

by Jim Kelly, Vice President, Industry Relations Production Resource Group, LLC

by Kim Bercovitz, Ph.D., President & Chief Exercise Officer, Exercise Bytes Inc.
The EVENT
Photos by Christies Photographic Solutions
Bill Adams  
National Sales Manager, Visit Norfolk

Bill spent time with the Annapolis and Syracuse Convention and Visitors Bureaus before joining Visit Norfolk in 2012. As a National Sales Manager, Bill works primarily within the Washington DC area market, including Virginia, Maryland and DC. Even during a brief discussion with him, you can tell how much he loves the Norfolk area, the clients he works with and his colleagues.

PCMA offers Bill access to great educational opportunities and has helped him increase his industry knowledge and application of that knowledge to his job. By attending PCMA events, he has been able to network with many event planners and potential customers, make valuable connections and develop industry relationships.

When not working, Bill enjoys spending time with his lovely wife Tara and his three children, daughters Makayla, age 13, Riley, age 9 and his son Steven, age 7. He loves to salsa dance, even though he’s still learning, he enjoys getting out on the dance floor. He plays and coaches basketball, and spends time with Kobe, his adorable Maltese/Schnauzer buddy.

—by Catherine A. Chenevey, CMP, Project Manager, Events, American Institute of Aeronautics and Astronautics

Mindy Halpert  
Conference Manager  
Consortium for School Networking

Like the “Wedding Planner,” Mindy’s story could be called “Bat Mitzvah Planner.” Mindy was a 12-year-old planning her internationally-themed Bat Mitzvah and knew exactly what she wanted. Her road block, the caterers, thought to ignore her but learned different. Mindy got her way and the event was an absolute success.

Then Mindy learned she could make a career planning events.

Fast forward and Mindy enrolled in James Madison University, Hospitality and Tourism Management. She joined PCMA-Student Chapter, became President, and, through networking within PCMA, found her first job with the Optical Society. Wanting to be the best, Mindy discovered PCMA was the perfect vehicle to grow in knowledge. As a student she was mentored by Rebecca Ramsey and still asks Rebecca for advice. PCMA recognized Mindy’s quest for excellence in Boston by naming her one of the “20 in their Twenties,” the best and brightest in the meeting industry.

Childhood tea parties matured into a love for cooking, creating cookbooks and exploring restaurants worldwide… Paris, London, Munich, Vienna and this year’s trip, San Diego. While young, Mindy traveled to Chile to ski, slept through her alarm, missed skiing AND an avalanche! Her luck prevailed when the next day she got to meet the U.S. Olympic Ski team-in-training. Not bad Mindy! •

—by Marilyn Atchue-Zuill, Global Account Director, HPN Global

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