



<INSERT CHAPTER NAME> Chapter Performance & Metrics Scorecard 2020-2021

This scorecard measures your chapter's performance against MPI Bylaws and Global Policies minimum chapter performance standards required to maintain your chapter charter as well as best operational practices for fiscal sustainability, operational health and membership engagement. Five additional highlighted areas relate to the Metric Incentives Program, performance "stretch goals" that reward qualifying high-performing chapters with additional incentives and recognition at the annual chapter performance awards.. Your Chapter Operations Manager or Director will use this scorecard to review your performance twice a year. Performance & Metrics Scorecard guidelines are at the end of this document.

MEMBERSHIP SATISFACTION & GROWTH	Objective	Target	Current	
	MEMBER SATISFACTION (Metric Incentive #1)	1 - Needs Improvement = ≤ 60%		
		2 - Sustaining = 60.1 - 70%		
		3 - High Performing / Level 1 Metric Incentive = 70.1 –75%		
		4 – Level 2 Metric Incentive = 75.1 – 80%		
		5 – Level 3 Metric Incentive = 80.1% or higher		
	MEMBER RETENTION WITHOUT STUDENTS	1 - Needs Improvement = Below 70%		
		2 - Sustaining = 70.1 - 75%		
		3 - High Performing = 75.1% or Higher		
	NET MEMBER GROWTH (Metric Incentive #2)	1 - Needs Improvement = ≤ 0.50%		
2 - Sustaining = 0.51 - 3.5%				
3 - High Performing /Level 1 Metric Incentive = 3.51- 5.0%				
4 – Level 2 Metric Incentive = 5.1 – 5.99%				
5 – Level 3 Metric Incentive = 6.0% or higher				
NON-MEMBER CONVERSION RATE	1 - Needs Improvement = ≤ 2%			
	2 - Sustaining = 2.1 - 10%			
	3 - High Performing = ≥ 10.1%			
Total Membership Satisfaction				

ADMINISTRATION & FINANCE	Objective	Target	Current	
	CHAPTER COMPLIANCE	1 – Needs Improvement = Not submitted on time or missing documents		
		2 – Sustaining = Submits on time and completed		
	GOVERNANCE OVERSIGHT	1 – Needs Improvement = Outdated or incorrect bylaws/policies. Does not use policies & weak board meeting processes		
		2 – Sustaining = Current bylaws/policies in place and consistently adheres to them. Firm board practices		
	NET PROFIT/FISCAL SUSTAINABILITY (Metric Incentive #3)	1 – Needs Improvement = ≤ 1.00%		
		2 – Sustaining = 1.1 – 5%		
		3 – High Performing / Level 1 Metric = 5.1 - 8%		
		4 – Level 2 Metric Incentive = 8.1 – 10%		
		5 – Level 3 Metric Incentive = 10.1% or higher		
RESERVES AS % OF FIXED ANNUAL OPERATING EXPENSES	1 – Needs Improvement = < 50% of Target			
	2 – Sustaining = 50.1 – 100% of target			
	3 – High Performing = > 100.1% of target			
Total Administration & Financial Practices				

EDUCATIONAL OFFERINGS	Objective	Target	Current	
	CONTENT SATISFACTION	1 - Needs Improvement = $\leq 4.21\%$ or less survey score		
		2 - Sustaining = 4.22 – 4.32% survey score		
		3 - High Performing = 4.33% or higher		
	CLOCK-HOUR ACCREDITED EDUCATIONAL OFFERINGS (Metric Incentive #4)	1 – Needs Improvement = 5 or fewer offerings		
		2 – Sustaining = 6 or more educational offerings		
3 – High Performing/Level 1 Metric Incentive = 6 or more educational offerings, of which 3 are clock-hour accredited				
4 – Level 2 Metric Incentive = 6 or more educational offerings, of which 4-5 are clock-hour accredited				
5 – Level 3 Metric Incentive = 6 or more educational offerings, of which 6 or more are clock-hour accredited				
Total Educational Offerings				

COMMUNICATION & BRAND	Objective	Target	Current	
	COMMUNITY PRESENCE	1 – Needs Improvement = Outdated information on website, no social media presence		
		2 – Sustaining = Current website & at least one social media outlet		
	BRAND COMPLIANCE	1 – Needs Improvement = Does not adhere or meet guidelines consistently or timely		
		2 – Sustaining = Meets guidelines consistently & timely		
Total Communications & Brand				

LEADERSHIP & ENGAGEMENT	Objective	Target	Current	
	SUCCESSION	1 – Needs Improvement = Incomplete Board slate / low candidate pipeline		
		2 – Sustaining = Complete Board slate submitted on time		
	VOLUNTEER ENGAGEMENT (Metric Incentive #5)	1 – Needs Improvement = $< 15\%$		
		2 – Sustaining = 15.1 – 20%		
		3 – High Performing /Level 1 Metric Incentive = 20.1 – 25%		
4 – Level 2 Metric Incentive 25.1 – 30%				
5 – Level 3 Metric Incentive 31% or higher				
Total Leadership & Engagement				

TOTAL SCORE	NEEDS IMPROVEMENT	SUSTAINING	HIGH PERFORMING
	4 or more ones overall regardless of score	1 – 3 ones overall regardless of score	Score of 32 or higher with no ones in any category
	METRIC INCENTIVE AWARD POINTS (25 max points available)		

Guidelines - Chapter Performance & Metrics Scorecard 2020-2021

This Chapter Performance and Metrics scorecard is provided to help Chapter Leaders track Chapter performance against minimum requirements set forth in accordance with their Chapter charter outlined by MPI Bylaws and Global policies. This scorecard further guides Chapter Leaders to operate sustainably, with fiscal responsibility and insures strong succession pipelines and member engagement.

Chapter business plans developed at annual retreats, will require minimally “sustaining level” goals for each segment. Chapter performance reviews will be conducted twice annually to insure minimally “sustaining level” standards are maintained. Chapters falling into a “needs improvement” performance level will work with their Chapter Operations Manager or Director to develop an action plan. Chapters falling into a “high performing” performance level may become eligible for incentives and awards. Scores will be calculated for Levels 1 – 3 as follows:

- NEEDS IMPROVEMENT – 4 or more ones overall regardless of score
- SUSTAINING – 1 – 3 ones overall regardless of score
- HIGH PERFORMING - Total score 32 or higher with no ones in any category

“High Performing” chapters (level 3 – 5) will earn metric award points (25 max) redeemable for incentives that benefit the Chapter and its membership. Additionally, High Performing chapters may be eligible for annual chapter performance recognition.

NOTES ON KEY AREAS

MEMBERSHIP SATISFACTION & GROWTH: Member Satisfaction, Retention Without Students and Net Member Growth standards are defined based on overall performance for the Chapter’s fiscal year. Non-Member Conversion is based on historic chapter performance data.

ADMINISTRATION & FINANCE: Chapter Compliance and Governance Oversight standards are defined by MPI Chapter Bylaws. Net Profit/Fiscal Sustainability Metric and Reserves standards are also defined by MPI Chapter Bylaws to guide Chapters to achieve financial stability and fiscal health through responsible management of cash flow and reserve funds.

EDUCATIONAL OFFERINGS: MPI Chapters are required to offer a minimum of six public educational offerings per fiscal year. CMP Boot Camps do not count towards this total. Digital (virtual) and hybrid events may count towards the annual total providing they comprise no more than 50% of the total annual educational offerings. Content Satisfaction is measured by chapter surveys on a 5-point scale. To qualify for Clock-Hour Accredited Educational Offering Metric, a chapter must have its content reviewed by a governing body that offers clock hours or credits towards an industry certification, such as the Event Industry Council (CMP), ILEA (CSEP), ASAE/CSAE (CAE); a university or college, etc.

COMMUNICATION & BRANDING: Community Presence is a best practice standard set by MPI Global. Brand Compliance is an MPI Policies chapter charter requirement.

LEADERSHIP & ENGAGEMENT: The Succession standard is an MPI Policies-mandated chapter charter requirement designed to help chapter leaders maintain a robust leadership pipeline. Volunteer Engagement is a metric defined by MPI Global best practices to encourage strong volunteer engagement which positively impacts membership retention and results in a balanced workload for Chapter leaders.

This Chapter Performance & Metrics scorecard and related metric incentives and awards programs are reviewed annually and may be subject to change. If you have any questions, please contact your Chapter Operations Manager or Director.