

2027 ANNUAL RETREAT MPI UPDATE



CHAPTER OPERATIONS



Timothy Gunn

**Vice President of
Community**



Federico Toja

**Regional Director of
Operations - *EMEA, APAC,
& LATAM***



**Angela Layton,
CMP Fellow, CMM**

**Regional Director of
Operations – North America**



MEMBER ENGAGEMENT TEAM

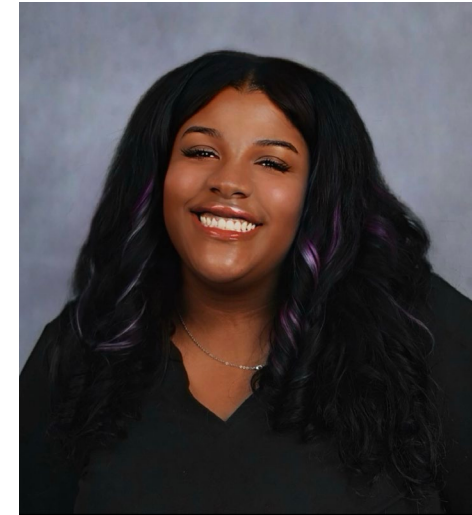


Christine Richards
Manager, Membership
Development
Canada, EMEA & APAC



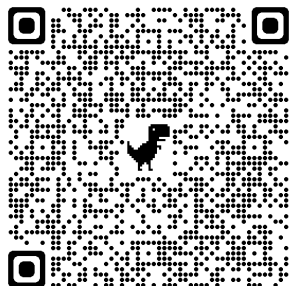
Marlene Jackson
Member
Engagement Rep

Southwest US,
Northeast US, LATAM



Jazzlynn Garrett
Member
Engagement Rep

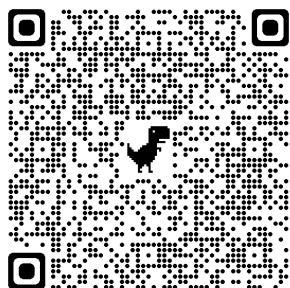
Pacific US, Midwest US,
Southeast US



Contact Info by Chapter for
Chapter Ops & Membership Teams

PARTNER WITH YOUR MEMBER ENGAGEMENT REPRESENTATIVE

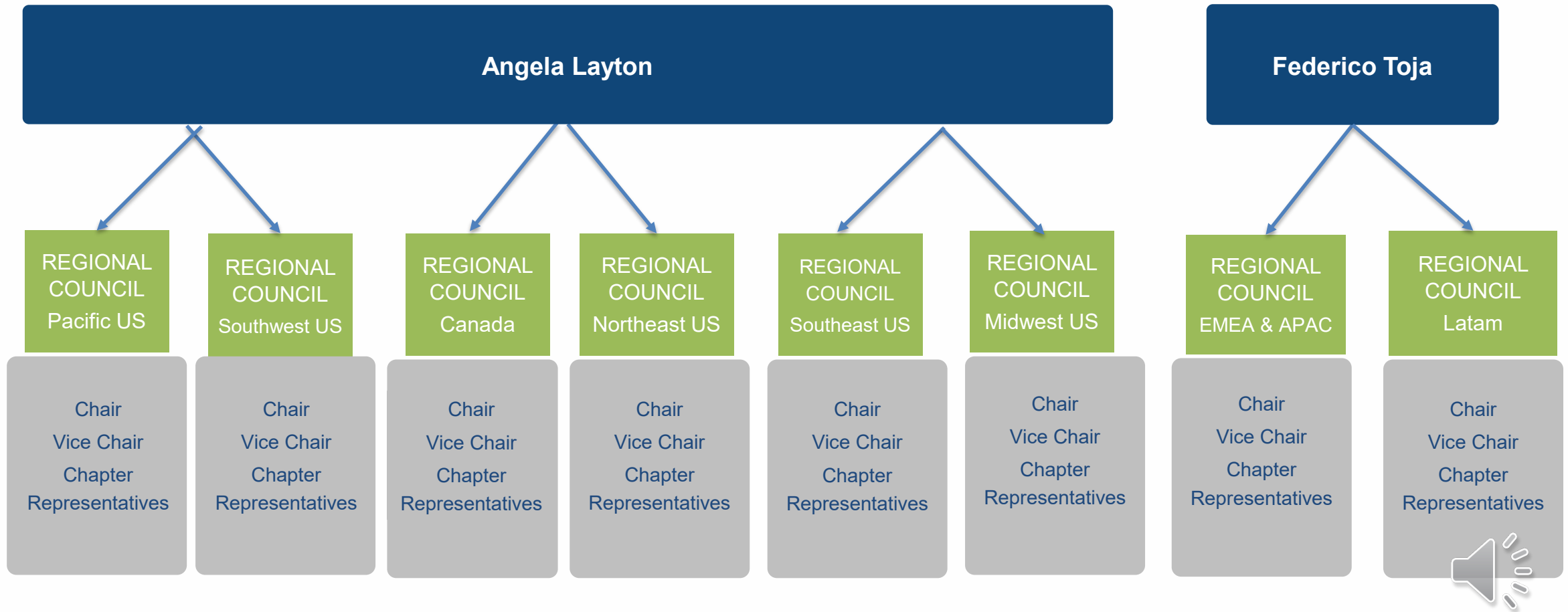
- **New Membership:** Encourage members to attend a monthly New Member Orientation.
- **Membership Upgrades:** Follow-up with Essential members that are within your chapter area to upgrade to the Preferred member tier.
- **Profile Update:** If members provide you with new contact information, forward it to your Member Engagement Representative.
- **Membership Renewals:** This includes all members who are currently due to renew.
- **Login Issues:** Access or creating an account on mpi.org.
- **Other:** Installment plans, unemployed members, student in transition, retired and Lifetime memberships.



Contact Info by Chapter for
Chapter Ops & Membership Teams



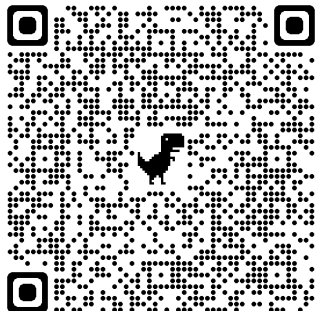
REGIONAL MANAGEMENT



REGIONAL ALIGNMENT



Region	Pacific US	Southwest US	Midwest US	Southeast US	Northeast US	Canada	LATAM	EMEA & APAC
Chapter Operations	Angela Layton	Angela Layton	Angela Layton	Angela Layton	Angela Layton	Angela Layton	Federico Toja	Federico Toja
Membership	Jazzlynn Garrett	Marlene Jackson	Jazzlynn Garrett	Jazzlynn Garrett	Marlene Jackson	Christine Richards	Marlene Jackson	Christine Richards
Regional Council Chair/Vice Chair	Lauren Siring & Bryan Quinan	Paige Mejia & Terri Rickard	Whitney Butler & Jenn Morden	Liz Hogan & Charlene Liu	Anthony Molino & David Hughes	Wentworth Willock & Ryan Young	Humberto Garcia & Rafa Hernandez	Suzanne Mulligan & Marjolein Blok-Dignum
	Aloha Northern California Oregon Sacramento/Sierra Nevada San Diego Southern California Washington State	Arizona Sunbelt Dallas/Fort Worth Houston Area New Mexico Oklahoma Rocky Mountain Texas Hill Country	Chicago Area Heartland Indiana Kansas City Michigan Minnesota Ohio Valley St. Louis Area Wisconsin	Carolinas Georgia Greater Orlando Gulf States Kentucky Bluegrass North Florida Tampa Bay Area Tennessee South Florida Virginia	Connecticut Greater New York Middle Pennsylvania New England New Jersey Philadelphia Area Pittsburgh Potomac Upstate New York	Atlantic Canada British Columbia Greater Calgary (Club) Greater Edmonton Ottawa Toronto	Argentina (Club) Brazil (Club) Bajio Mexicano (Club) Caribe Mexicano Central America (Club) Colombia Ecuador (Club) Mexico Peru	Belgium Luxembourg France-Switzerland Iberian Italia Japan The Netherlands Poland Scandinavia Türkiye United Kingdom & Ireland



CLRP → Chapter Leader Training → Board Orientation → MPI Team Contacts



Training & Support



- **Annual Volunteer Training**
 - Board 101, Sexual Harassment, Principles of Professionalism, EDI, Conflict Resolution. *Any topic not covered at CLS will be available online.*
- **Chapter Leader All Hands Calls**
 - Inform Volunteer Chapter Leaders with crucial information and updates about our organization.
- **Role Specific Training**
 - Sitefinity (website management)
 - QuickBooks Online



CHAPTER LEADER COMMUNITIES



Chapter Leaders: Education

Private Community: Current MPI Chapter Leaders serving in education role.

last person joined 2 days ago

[Join](#)

Discussions **23**

Libraries **0**

Members **103**

Chapter Leaders: Finance & Strategic Alliances

Private Community: Current MPI Chapter Leaders serving in the finance, sponsorship, strategic alliances or sales/advertising capacity.

last person joined 2 days ago

[Join](#)

Discussions **28**

Libraries **0**

Members **104**

Chapter Leaders: Marketing & Communication

Private Community: Current MPI Chapter Leaders serving in a marketing or communications role.

last person joined 2 days ago

[Join](#)

Discussions **32**

Libraries **2**

Members **91**

Chapter Leaders: Membership

Private Community: Current MPI Chapter Leaders serving in the membership role.

last person joined 2 days ago

[Join](#)

Discussions **49**

Libraries **1**

Members **122**

Chapter Leaders: Office of the President

Private Community: Current MPI Chapter Leaders serving in the Office of President.

last person joined yesterday

[Join](#)

Discussions **51**

Libraries **3**

Members **150**



CHAPTER LEADER FORUMS



- Another way to Meet Chapter Leaders and Share Best Practices is to attend Chapter Leader Forums (CLF)!
- This is an in-person event held at MPI Signature events & major tradeshow
- EMEC in Galway - February 21
- IMEX Frankfurt - May 10
- FIEXPO Costa Rica - June 7
- WEC Las Vegas - June 28
- IMEX America - September 27



CHAPTER LEADER NEWSLETTER



- Email sent to all Volunteer Chapter Leaders
- Second Thursday of each month
- Simplified & copy/paste content
- Easy access to archived past newsletters



CHAPTER LEADER RESOURCE PAGE (CLRP)



- Log in to mpi.org
- Click on the drop-down menu by your name and select “Chapter Leader Resources”
- Buttons to run Membership and Chapter Metrics (Dashboard) Reports are at the top *(only permit your Administrator or one designated leader enter dashboard data)*
- Role-Specific content areas are below so you can select the library and download what you need

Hi, Timothy ▾ Your Chapter: Dallas/Fort Worth Chapter



Timothy Gunn,
Vice President of Community
Meeting Professionals International

Dallas, TX
Association/Not For Profit Meeting
Professional
Dallas/Fort Worth Chapter

Preferred Membership
Member ID: 1241237
Expires on: 7/31/2026

[Update My Account Settings](#)
[Chapter Leader Resources](#)

[Sign Out](#)



Chapter Metrics



Membership Reports



Newsletter

CHAPTER LEADER RESOURCE PAGE



Resources Available:

- Chapter Administrators
- Chapter Leader Training
- Chapter Toolkits
- Compliance
- Education
- Finance
- Marketing & Communications
- Membership
- Office of the President
- RISE Up



Chapter Administrators

Partners of MPI Global and our chapters.



Chapter Toolkits

Resources to help you stay in sync.



Education

MPI education and best practices.



Marketing & Communication

Marcom documentation.



Chapter Leader Training

Resources to help you be successful.



Compliance



Finances

Budget, sponsorship and best practices.



Membership

Membership documentation.

AI GENERATED SUPPORT



Chapter Metrics



Membership Reports



Newsletter

Chapter Leader Resources



Chapter Administrators

Partners of MPI Global and our chapters.



Chapter Leader Training

Resources to help you be successful.



Chapter Leader Resource Agent

CLR

Hello, I'm the Chapter Leader Resources Agent. How can I help?

Just now

You

Where do I find my metric dashboard reports?

Just now

CLR

You can access your chapter's metric dashboard reports by logging in to the Chapter Leader Resource Page (CLRP) at mpi.org/admin. Once logged in, you'll find the "Membership" and "Chapter Metrics" reports, which refresh roughly every 24 hours. These reports show your chapter's performance across the seven official metrics: Member Satisfaction, Member Retention without Students, Net Member Growth without Students, Education Satisfaction, Accredited

Type your message





2027 Compliance & Performance Metric Goals



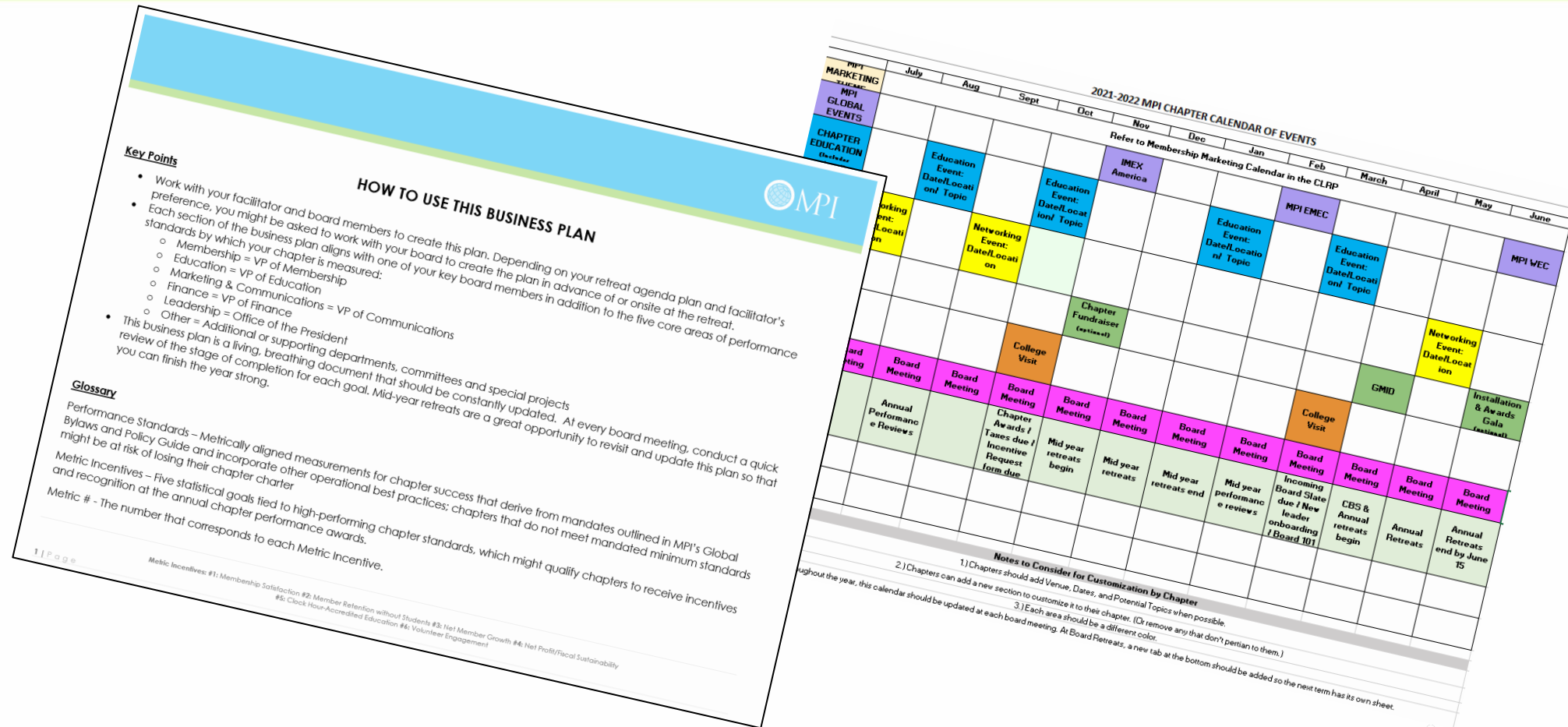
December 1

- MPI Volunteer Leader Agreement: Electronic signature via Adobe Sign. This will be emailed by MPI directly to each volunteer leader.
- Strategic Business Plan (MS Excel version), Budget, 18–24-month MPI Chapter Calendar of Events, current MPI Chapter Policy Manual
- Chapter administrator evaluation (if a paid administrator) and annual proof of insurance.
- Regional Council Chapter Representative Submission

The Compliance Checklist can be found here: [CLRP > Compliance > December 1](#)



BUSINESS PLAN & CALENDAR TEMPLATES



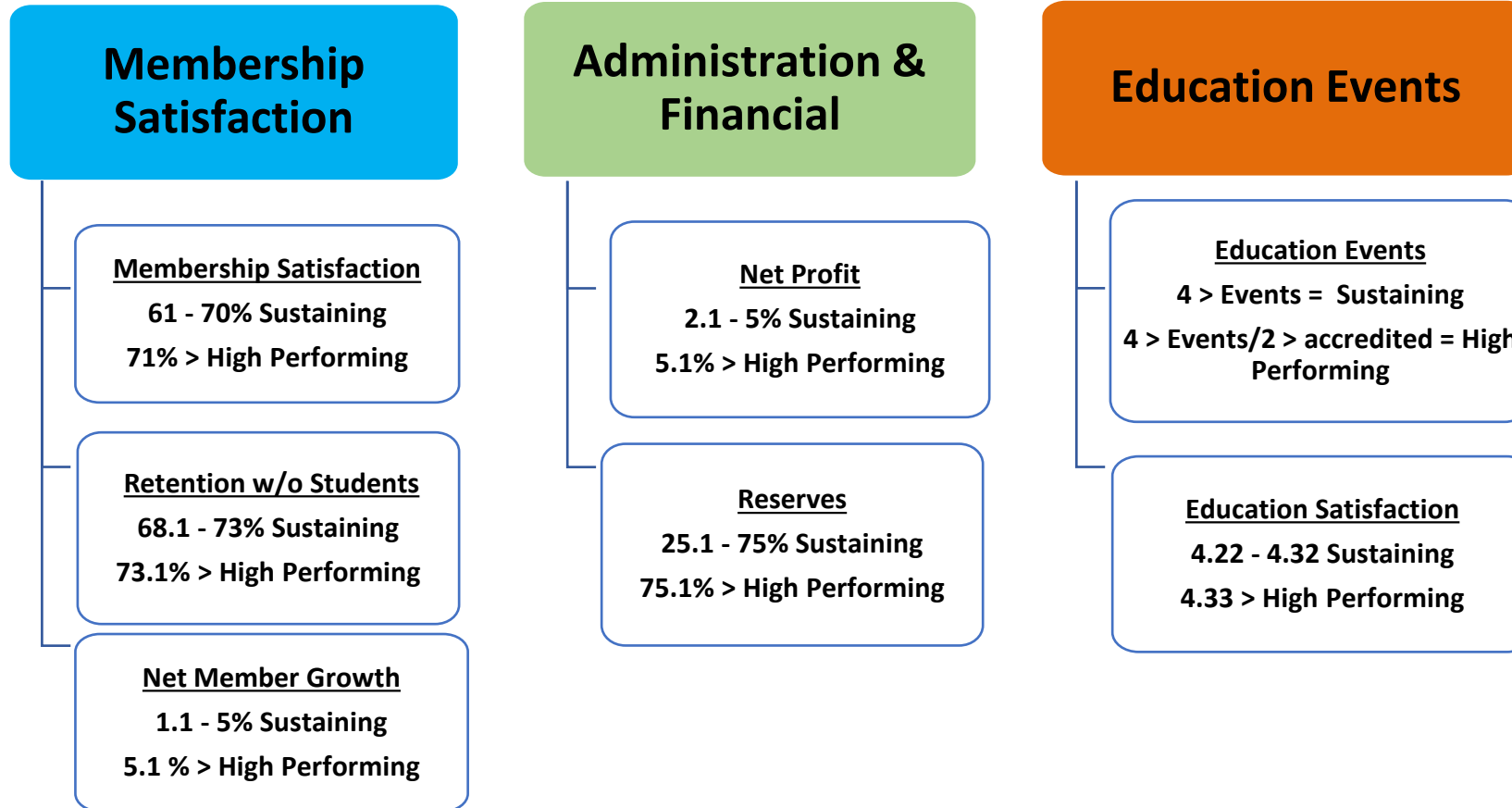
Chapters MUST use these templates found in the CLRP

CLRP > Compliance > December 1 Compliance

There is no required Budget template



2027 PERFORMANCE METRIC GOALS



ANTI-HUMAN TRAFFICKING AWARENESS ACTIVITY

- Annual requirement
- Any initiative that supports Anti-Human Trafficking awareness
- Visit <https://www.mpi.org/tools/anti-human-trafficking> for ideas under the Chapter Education Toolkit section of this page
 - Chapters are not restricted to the initiatives that appear on the website – creativity is encouraged
 - Chapters may not repeat an initiative that has been used in the past two years to fulfill the annual requirement
- Chapters will report the fulfillment of the AHT Requirement on the Chapter Metric Dashboard.



CHAPTER DASHBOARD REPORT



Log into mpi.org -> "Chapter Leader Resources"

Clock Hours

My Academy

Member Directory

Community

Jobs

Chapter Metrics

Membership Reports

Newsletter

Data is updated once every 24 hours

	June Y/E	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
Total	448	439	447	445	446	457	473	464	469	475				460
New	141	7	23	7	7	13	28	6	8	17				116
Renew	266	22	15	19	24	25	36	25	29	36				231
Reinstate	6						1	2	1	1				5
Cancel	177	14	14	8	7	4	14	15	6	13				95
Chapter Transfer Out	22	4	3	2	1	1	3	1		2				17
Chapter Transfer In	14	2	1	1		3	1		3	2				13
Retention	64.92%	66.53%	67.51%	67.32%	69.54%	71.43%	74.06%	73.13%	73.86%	74.61%				74.61%
Retention_NonStudent	65.70%	67.52%	68.33%	68.16%	70.68%	72.23%	74.77%	73.76%	74.71%	75.45%				75.45%
Volunteer Engagement	101	94	105	101	102	101	104	114	10	0	0	0	0	91
Education Satisfaction			4.74			4.53			3.75					4.45
Education Survey Responses			19			38			12					69

Net Non-Student / Non-Trial Member Growth

	FY 21 - 22	FY 22 - 23	
July	461	428	-2.28%
Aug	447	435	-0.68%
Sept	439	434	-0.91%
Oct	436	435	-0.68%
Nov	433	445	1.60%
Dec	435	460	5.02%
Jan	422	453	3.42%
Feb	433	458	4.57%
Mar	431	465	6.16%
Apr	436	0	-100.00%
May	439	0	-100.00%
June	438	0	-100.00%

Incentive Key:
1 Point = 0.1% - 1.5%
2 Points = 1.51% or Higher

Education / Accredited Education Offerings Incentive Key:

YTD Actual
Accredited Events 4 / Cumulative Events 4

1 Point = 4 or more with 0 accredited
2 Points = 4 or more with 2 or more accredited

Educational Offering Content Satisfaction Incentive Key:

1 Point = 4.22 - 4.32
2 Points = 4.33 or Higher

Member Retention (Non-Student) Incentive Key:

1 Point = 65.1% - 71.1%
2 Points = 71.1% or Higher

Member Satisfaction (Yearly Performance)

	FY 21 - 22	FY 22 - 23	Incentive Key:
MPI Chapter Satisfaction Survey			
Satisfaction Rate:	65%	0%	1 Point = 51% - 54%
Satisfaction Response Rate:	17%	0%	2 Points = 55% or Higher
Satisfaction Response Count:	69	0	

* A minimum of 12% of membership respondents is recommended to achieve valuable, actionable data.

METRICS INCENTIVE PLAN



Metric Incentives may be earned based on performance, evaluated after the close of the year. Performance levels earn the following points: Sustaining - 1 point and High Performing – 2 points.

Maximum points available – 14 points

Points may be redeemed for the following incentives:

1 complimentary preferred level new membership or membership renewal for a planner or supplier. Renewal certificates may only be offered to members who have not yet renewed for the next calendar year	4 points each
1 complimentary registration for a 4-hour (select) MPI Academy Certificate Course (digital delivery only) for a Chapter Member	3 points each
20% off a membership renewal or new membership (discount certificates may only be offered to members who have not yet renewed for the next calendar year.)	1 point each



CHAPTER AWARDS RECOGNITION



CHAPTER OF EXCELLENCE



2024 CHAPTER AWARD

TOP PERFORMING



2024 CHAPTER AWARD

Categories tracked: Member Satisfaction, Member Retention, Net Member Growth, Net Profit, Reserves, Education Satisfaction, Accredited Educational events. Results are determined through chapter dashboard results and Chapter Performance & Metric summaries.

Chapter Merit Award: winners achieved highest performance over all chapters in a specific **focus area**.

Top Performing: winners achieved “High Performing” status with a minimum **6 out of 7 focus areas** of chapter management or membership satisfaction.

Chapter of Excellence: winners achieved “High Performing” status in **7 out of 7 focus areas** of chapter management and membership satisfaction.





EVENTS



2027 IMPORTANT DATES



Date	Event
January 1	Fiscal Year 2027 Begins
February 20-23	European Meetings & Events Conference (EMEC) - Galway, Ireland
TBA by the EIC	Global Meetings Industry Day (GMID)
April – June	Chapter Mid-Year Retreats (optional but recommended)
June 28-30	World Education Congress (WEC) - Las Vegas, Nevada
July 1	2028 Chapter Board Slates Sent to Membership for Approval
August 1	2028 Chapter Board Slates Submitted to Global
September TBA	Chapter Leadership Summit (CLS)
September TBA	theEVENT (Canada)
September – November	Chapter Annual Retreats





- Annual invitation-only executive level event
- Hosted by the MPI Foundation
- Discuss industry challenges, exchange ideas, and develop practical solutions to benefit the profession.





- Regional, one-day events
- Connects qualified meeting planners with supplier partners through structured networking, business appointments, and education.
- Often includes destination or venue experiences hosted by local partners.



SIGNATURE EVENTS





When we **meet**, we change the world. SM

