



2023 – 2024

MID - YEAR UPDATE



# CHAPTER RELATIONS TEAM



**Timothy Gunn**  
Director of  
Chapter Operations



**Federico Toja**  
Director of Chapter  
Operations - Europe



**Marcelo DeOliveira**  
Regional Operations  
Manager



**Angela Layton, CMP**  
Fellow, CMM, DES  
Regional Operations  
Manager

# MEMBER ENGAGEMENT TEAM



**Teresa Sauced**  
Member  
Engagement Rep



**Marlene Jackson**  
Member  
Engagement Rep



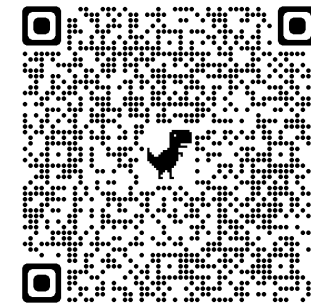
**Victoria Schaefer**  
Manager, Membership  
Development



**Mark Killgore**  
Member Engagement  
Rep



**Jazzlynn Garrett**  
Member Engagement  
Rep



Contact Info by Chapter for  
Chapter Ops & Membership Teams



UPDATES



## Chapter Metrics

The FY2023-2024 Metric goals will not change.

The Chapter Performance Metric Awards have been updated to pre-pandemic levels.



# 2023-24 PERFORMANCE STANDARD & METRIC GOALS



## Membership Satisfaction

**Membership Satisfaction**  
61% – 70% Sustaining  
71% > High Performing

**\* Retention w/o Students**  
68.1% - 73% Sustaining  
73.1% > High Performing

**Net Member Growth**  
0.1% – 3% Sustaining  
3 % > High Performing

## Administration & Financial

**Net Profit**  
0% - 1% Sustaining  
1.1% > High Performing

**Reserves**  
25.1 – 75% Sustaining  
75.1% > High Performing

## Education Events

**Clock Hour Accreditation**  
4 > Events = Sustaining  
4 > Events/2 > accredited = High Performing

**Education Content Satisfaction**  
4.22 – 4.32% Sustaining  
4.33% > High Performing



# INCENTIVE PLAN



The Summary will track Metric Incentives earned based on performance.

Maximum points available – 14 points

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 (renewal certificates may only be offered to members who have not yet renewed for the next calendar year.)	1 point each



## CHAPTER AWARDS CRITERIA

**Categories tracked:** Member Satisfaction, Non-Student Member Retention, Non-Student Net Member Growth, Net Profit, Reserves vs. Annual Fixed Expenses, Education Content Satisfaction, Number of Accredited vs. Non-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**.

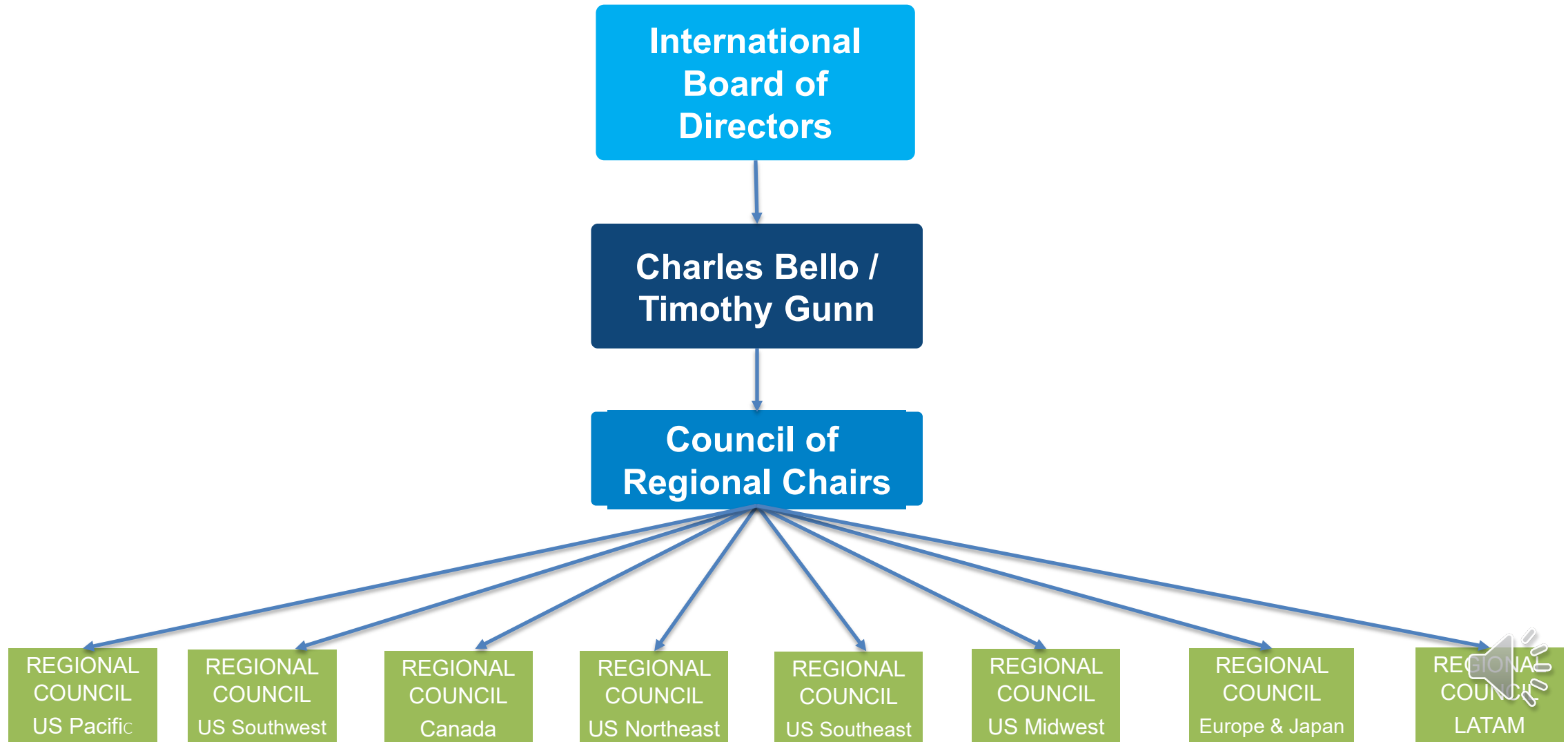
**Top Performing:** winners achieved “High Performing” status in ~~4-5~~ **6 out of 7 focus areas** of chapter management and membership satisfaction.

**Chapter of Excellence:** winners achieved “High Performing” status in ~~6-7~~ **7 out of 7 focus areas** of chapter management and membership satisfaction.

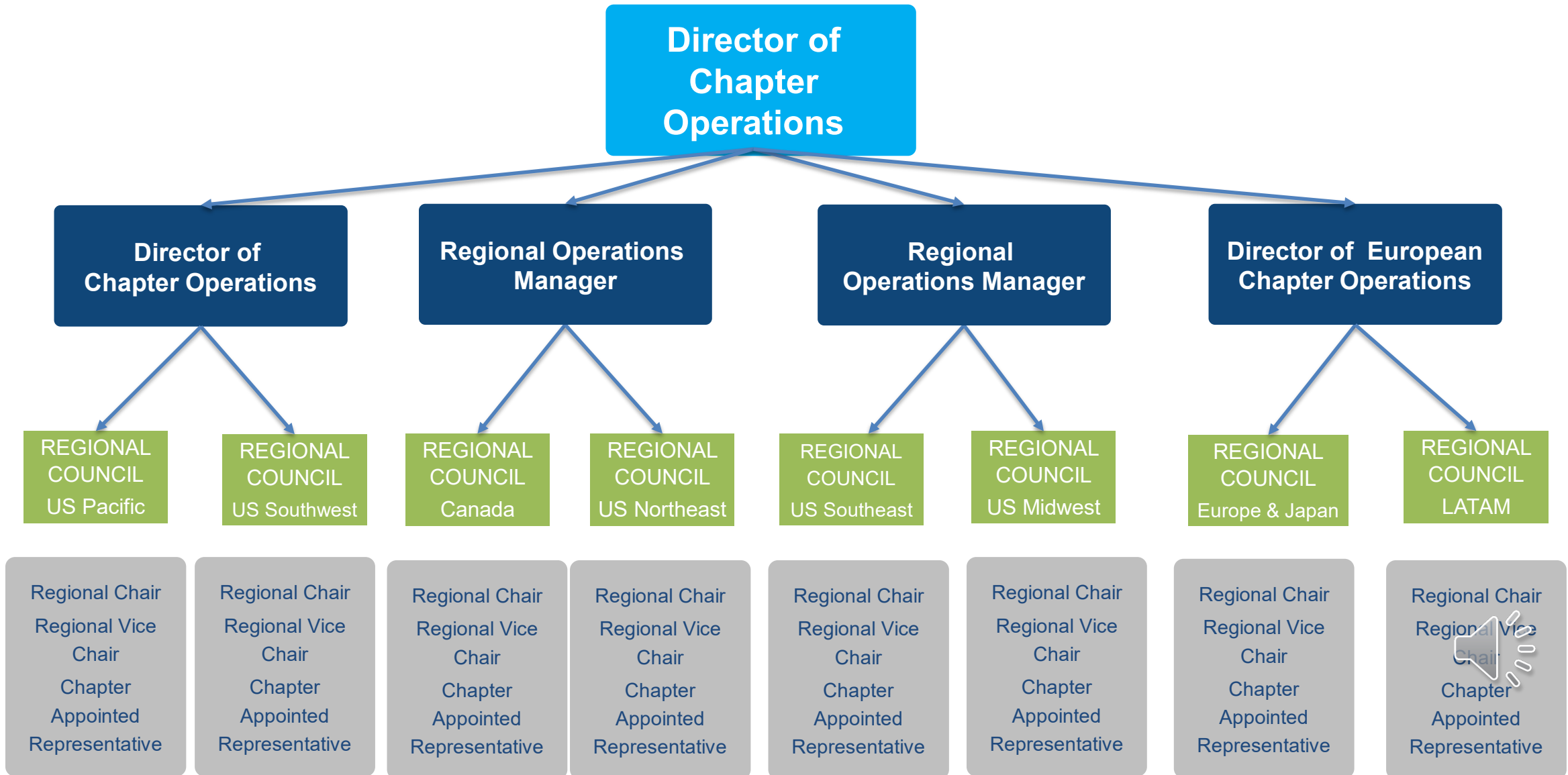




# REGIONAL ALIGNMENT



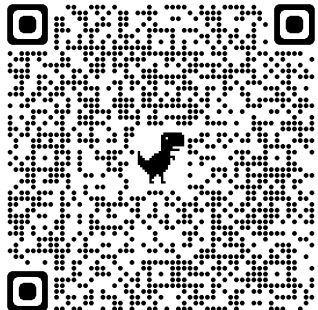
# REGIONAL ALIGNMENT



# REGIONAL ALIGNMENT



Pacific US	Southwest US	Midwest US	Southeast US	Northeast US	Canada	LATAM	EMEA & APAC
<b>Timothy Gunn</b> E tgunn@mpi.org M 214-354-0274 O 972-702-3001	<b>Timothy Gunn</b> E tgunn@mpi.org M 214-354-0274 O 972-702-3001	<b>Angela Layton</b> E alayton@mpi.org O 972-702-3002	<b>Angela Layton</b> E alayton@mpi.org O 972-702-3002	<b>Marcelo DeOliveira</b> E mdeoliveira@mpi.org M 647-627-7625	<b>Marcelo DeOliveira</b> E mdeoliveira@mpi.org M 647-627-7625	<b>Federico Toja</b> E ftoja@mpi.org M +33-610-24-5377	<b>Federico Toja</b> E ftoja@mpi.org M +33-610-24-5377
<b>Jazzlynn Garrett</b> E jgarrett@mpi.org O 972-702-3036	<b>Mark Killgore</b> E mkillgore@mpi.org O 972-702-3016	<b>Jazzlynn Garrett</b> E jgarrett@mpi.org O 972-702-3036	<b>Mark Killgore</b> E mkillgore@mpi.org O 972-702-3016	<b>Marlene Jackson</b> E mjackson@mpi.org O 972-702-3026	<b>Teresa Saucedo</b> E tsauceda@mpi.org O 972-702-3037	<b>Marlene Jackson</b> E mjackson@mpi.org O 972-702-3026	<b>Teresa Saucedo</b> E tsauceda@mpi.org O 972-702-3037
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 Potomac Tampa Bay Area Tennessee South Florida Virginia	Connecticut River Valley Greater New York Middle Pennsylvania New England New Jersey Philadelphia Area Pittsburgh Upstate New York WestField	Atlantic Canada British Columbia Greater Calgary (Club) Greater Edmonton Montreal & Quebec Ottawa Toronto	Argentina (Club) Brazil (Club) Caribe Mexicano Colombia Ecuador (Club) Mexico	Belgium Luxembourg Finland (Club) France-Switzerland Germany (Club) Iberian Italia Japan The Netherlands Poland Scandinavia Turkey (Club) United Kingdom & Ireland



CLRP → Chapter Leader Training → Board Orientation → MPI Team Contacts 2024



# REGIONAL COUNCIL



Pacific US	Southwest US	Midwest US	Southeast US	Northeast US	Canada	LATAM	EMEA & APAC
<b>MaryAnn Bobrow Chair</b>	<b>Steven Foster Chair</b>	<b>Bill Kubiak Chair</b>	<b>Shannon Jones Chair</b>	<b>Pam Kammerer Chair</b>	<b>Tim Whalen Chair</b>	<b>Ricardo Magana Chair</b>	<b>Thijs Peters Chair</b>
<b>Dana Marshall Vice Chair</b>	<b>Paige Mejia Vice Chair</b>	<b>Anthony Molino Vice Chair</b>	<b>Ricardo Hicks Vice Chair</b>	<b>Wendy O'Duffy Vice Chair</b>	<b>Heidi Hughes Vice Chair</b>	<b>Flor Lopez Vice Chair</b>	<b>Sen Gunersel Vice Chair</b>
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 Potomac Tampa Bay Area Tennessee South Florida Virginia	Connecticut River Valley Greater New York Middle Pennsylvania New England New Jersey Philadelphia Area Pittsburgh Upstate New York WestField	Atlantic Canada British Columbia Greater Calgary (Club) Greater Edmonton Montreal & Quebec Ottawa Toronto	Argentina (Club) Brazil (Club) Caribe Mexicano Colombia Ecuador (Club) Mexico	Belgium Luxembourg Finland (Club) France-Switzerland Germany (Club) Iberian Italia Japan The Netherlands Poland Scandinavia Turkey (Club) United Kingdom & Ireland



# FISCAL YEAR ALIGNMENT



Step 1: Create the online Suralink account

Step 2: Upload #1 by October 31, 2023

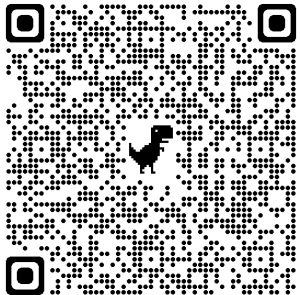
- By-Laws / Articles of Incorporation
- IRS determination letter or the corresponding document(s) for non-US chapters, if applicable
- Tax returns for: 6/30/22, 6/30/21, 6/30/20, and 6/30/19
- If 990N (postcard), just need to confirm that was filed (US chapters only)

Step 3: Upload #1 by November 30, 2023

- Current year tax return once completed for 6/30/23 fiscal year
- The name of the person who will be signing the return and their position
- The name of the person who keeps the books and records for the organization and their address, if different from the chapter's address

Step 4: Upload #1 by February 15, 2024

- Financials, including balance sheet, income statement, and general ledger, from 7/1/23-12/31/23
- List of Board of Directors as of 12/31/23, with their title and estimated weekly time devoted to the organization
- List of donors names, addresses, and amount donated for anyone who gave \$5,000 or more during the 7/1/23-12/31/23 timeframe, if applicable. This includes government grants, sponsorships, and both corporate and individual donations.
- Additional questions as needed will be tailored to each chapter based on the information presented in their financials.



Details on Fiscal Year FAQ



## **Submit revised documents for FY 2023/2024 by May 1, 2024:**

- Budget
- Business Plan
- Calendar

Revise to include current fiscal year through December 31, 2024



# CHAPTER BYLAWS & POLICY MANUAL



**Revisions were necessary to reflect the new fiscal year alignments and simplified chapter minimums.**

**Submit to MPI before May 1, 2024**



view the files online.

## Governance



[Guide to Updating Chapter Bylaws and Policies 2023 \(226 KB\)](#)



[MPI Chapter Bylaws - August 1, 2023 \(660 KB\)](#)



[MPI Chapter Policy Manual - August 1, 2023 \(674 KB\)](#)



[MPI HQ Bylaws - reference only \(229 KB\)](#)



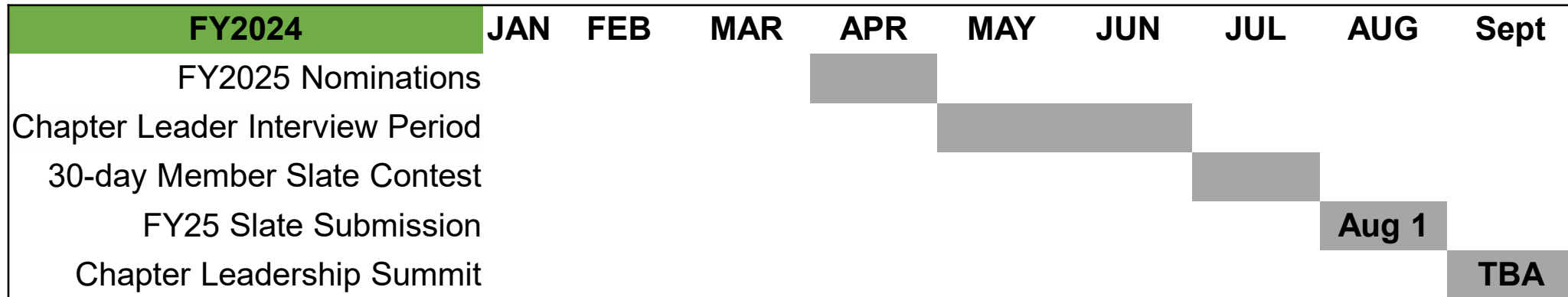
[MPI HQ Policy Manual - reference only \(345 KB\)](#)



# 2025 NOMINATION PROCESS



## Moving Forward





# RETREAT SEASON



## Moving Forward

FY2025	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Mid-year Retreat ( <i>optional</i> )				[Grey Bar]								
FY26 Annual Retreat									[Grey Bar]			



# COMPLIANCE DOCUMENTS

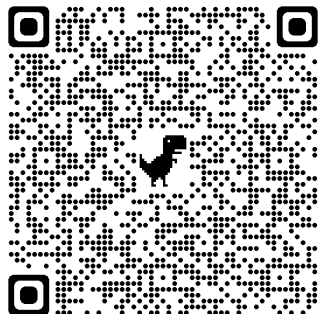


## **FY 2025 due by August 1**

- Board Slate

## **FY 2025 due by December 1**

- Volunteer Leader Agreement
- Strategic Business Plan
- Budget
- 18-24 month calendar
- Chapter Operations Form
- Paid Chapter Administrator
  - Annual Evaluation
  - Proof of Insurance
  - Contract (only if renewal or new)
  - License (only if new contract)



Compliance Document Checklist





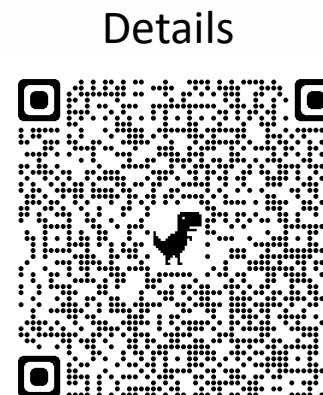
REMINDERS



# CHAPTER SPOTLIGHT: SOCIAL TAKEOVERS



- Real-time "takeover" posting to MPI's stories during an event
  - Share a live experience from your local chapter
  - Post videos, photos, and tag your chapter, venues, partners
- Takeover MPI's Facebook and Instagram Story to:
  - Spotlight your chapter
  - Show off a successful event
  - Bring your education to the larger MPI audience
  - Bring awareness to a cause





EVENTS

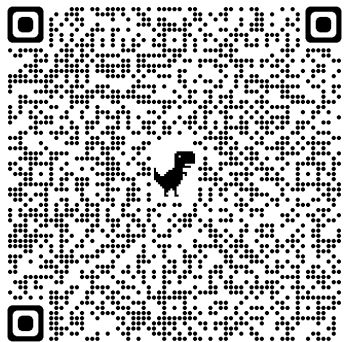


# MPI SIGNATURE EVENTS



## Chapter Leader Discount Now Available

- \$700 for all 2023/2024 Board Members and Chapter Admins (NEW!)
- To register, use the link on the Chapter Leader Newsletter or QR code below.
- No registration deadline!



# WEC 2024 CHAPTER CHALLENGE



## Awards Categories

- Most Creative Social Post Overall
- Best Inclusion of WEC 24 Theme "Craft Your Experience"

## Award Category based on Chapter size

- Small Chapter (50-150 members)
- Medium Chapter (151-350 members)
- Large Chapter (351+ members)

## 1 Winning Chapter from each Category by Chapter Size:

- 1 complementary membership (new or renewal) for winning chapter to distribute
- 1 registration to WEC St Louis in 2025 for winning chapter to distribute
- 1 complementary registration to WEC in 2025 pre-conference certificate program (value up to \$499.00)
- WEC24 Mainstage Recognition
- Additional MPI publications recognition in *The Meeting Professional*, [www.mpi.org](http://www.mpi.org) and *Onsite Daily*.







Advancing Our  
Industry by  
**Strengthening  
Our People**



# Do your members or chapter need help?



WHO WE ARE ▾

GET HELP ▾

GET INVOLVED ▾

FOREVER FUND ▾

FOUNDATION STORIES ▾

THANK YOU FOR YOUR  
CONTINUED SUPPORT:

DONATE

## MPI FOUNDATION SCHOLARSHIPS

Moving this community and our global industry towards critical recovery.

Scholarships are the core of your foundation's ongoing contribution to complement MPI membership, education and career opportunities. With these scholarships, together, we move this community and our global industry towards critical recovery. Whether you just started your career or you're an industry vet, the MPI Foundation assists those that share the same commitment and passion to professional excellence. Scholarships are governed by the Global Board of Trustees with oversight conducted by the Grants & Scholarship Committee.

Please read on to view scholarship opportunities.

[mpi.org/foundation/#gethelp](https://mpi.org/foundation/#gethelp)



## Recognizing Chapter Support of MPIF:

- Identify Chapter support of MPIF
- Past recipients:
  - MPI Poland
  - MPI Italia
- Recognized at WEC Louisville
- Simple Application process forthcoming



# 2023 Chapter Support



**HIGHEST CUMULATIVE DONATIONS IN LAST 8 YEARS**

## Forecasting: \$33,000

Oregon	\$68
Houston	\$2,195
British Columbia	\$941
UK/Ireland	\$2,359
Caribe/Mexico	\$650
Kansas City	\$1,500
Atlantic Canada	\$2,500
Rocky Mountain	\$4,001
Ottawa	\$1,425
Philadelphia Area	\$500
Greater Edmonton	\$407
Greater Orlando	\$779
Wisconsin	\$1,000
Southern California	\$447
Gulf States	\$814
Arizona Sunbelt	\$200
St. Louis Area	\$1,100
Italia Auction	\$9,000
Poland	\$1,000
Gulf States	\$814
Netherlands	\$1,000





# Connecting with 17 to 70





Use good to power extraordinary outcomes in the meetings, events, convention, travel and tourism industry...





## 40<sup>th</sup> Anniversary Campaign:

- Legacy Giving - 20 year + Members
- \$40 Giving Month - Individual (August)
- Storytelling: 40 stories
- 40 WEC Scholarships (\$1,000 value - May)
- 40 MPI Memberships (June)
- 40 The Event Scholarships (September)
- Several Celebration events





One Person. One Chapter. One  
Community. One Industry!

Contact:

**Kevin Kirby**

Executive Director | The MPI Foundation

[kkirby@mpi.org](mailto:kkirby@mpi.org)







When we **meet**, we change the world. <sup>SM</sup>

