



**Chapter Champion Guide to
MPI Club/Chapter Formation**

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Chapter Champion Guide to MPI Club/Chapter Formation

Welcome potential chapter champion!

We're thrilled you're considering opening a [Meeting Professionals International](#) (MPI) club or chapter in your region. This guide will give you an overview of who we are, how MPI operates and the steps needed to create a new club or chapter so you evaluate how ready you might be to take on this exciting challenge.

About MPI

The MPI vision is to lead and empower the meeting and event community to change the world. We do this by fulfilling our mission: To connect the global meeting and event community to learn, innovate, collaborate and advocate.

MPI aims to be the most inclusive and welcoming association for the global meetings, incentives, convention and event industry, and we're already the largest meeting and event industry association worldwide.

Founded in 1972, MPI is known for providing innovative and relevant education, networking opportunities and business exchanges at the global and local level. Our global community includes members who reside around the world.

Each of our 67+ MPI chapters and clubs is run like a small business by its volunteer leadership team. Annually, these MPI leaders produce educational and networking events around the world, helping us fulfill the universal MPI mission and vision in a way that's unique to the club or chapter's local community.

In this way, our MPI chapter and club leaders collectively elevate the quality of the industry's professionalism, community support and international business opportunities while creating uniquely relevant opportunities for their local members to learn, innovate, collaborate and advocate. This is the community of



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leaders that you would join as a chapter champion. In exchange for your time and effort, you will reap personal and professional benefits as you sharpen your leadership skills. You also will gain access to a global network of meeting and event industry thought leaders operating around the world.

How we operate

As a potential MPI chapter leader, it's important that you understand the guiding principles that all our leaders observe, because each chapter bases the way it operates on meeting the standards outlined in the [MPI Global Policies](#). Our [Principles of Professionalism](#) is our professional code of ethics.

The governing body of MPI is the International Board of Directors (IBOD). The IBOD reviews and approves the strategic plans developed by MPI Global's executive leadership team and staff, who are headquartered in Dallas, Texas. MPI Global's Chapter Operations Team, which works in remote offices around the world, oversees all elements of chapter operations, from chapter leadership training to new chapter development. When you're ready to make the commitment to become a chapter champion, we mentor you through the process and present your application to IBOD when you're ready to become an official club or chapter.

MPI clubs and chapters are similar in that each exist to fulfill the global MPI mission and vision, must meet globally mandated minimum standards, abide by local legal and tax requirements, are run by teams of volunteers, and must be incorporated as a nonprofit/charitable association. However, there are some differences.

The biggest difference is the number of members required to apply for club versus chapter charters and the structural requirements. Once you have a



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minimum of 20 members and a plan on how to get to 40 members, you can apply to MPI's IBOD for club recognition. Clubs have less governance requirements than chapters and can operate without bylaws and with a smaller leadership team. To be recognized as a chapter, you must have a minimum of 40 enrolled members and the potential to get to 100 members before you can submit to IBOD for recognition. Chapters operate with bylaws and a full board of directors. They have more reporting requirements than clubs, but they also benefit from additional MPI Global support. Because approved MPI chapters (and clubs, for a limited period) receive a portion of membership dues as a rebate, there is a financial upside to continuing to grow membership.

Prior to applying for club or chapter charters, make sure that you, members of your leadership team and anyone that you'd like to count as a prospective member of your club/chapter-in-formation are [current members of MPI](#). You should strive for at least 50 percent of the members on your list to belong to the "Planner" category, which includes meeting/event managers. Two-thirds of your members and fellow leaders should reside in your proposed geographic club/chapter area. Essential members will not count toward your total unless you can upgrade them to the Preferred or Premier membership level, which is where chapter affiliation applies.

If you are developing a club or chapter in a new region, MPI will look at various factors to help develop a membership dues structure that makes sense for your local currency and economy. One of the fastest ways to grow membership is to encourage [corporate memberships](#), which benefit employers as well as employees. Memberships may be purchased through MPI Global at any time of year, and dues cover a full year of global and local chapter/club benefits.

Basic steps required for forming a new club/chapter



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This is an outline of the club and chapter-in-formation process. Details, definitions and supporting materials are in a Chapter Formation Manual, which you can request by contacting the Community Engagement team members listed at the end of this document.

Step 1. DETERMINE FEASIBILITY

- A. Determine proposed geographical boundaries
 - a. If there is an established chapter nearby, the Community Engagement team might connect you with a potential “hub” chapter that can mentor you while you develop a “satellite” region until you’re ready to apply for club/chapter recognition.
 - b. If your proposed chapter overlaps an existing chapter’s boundaries, any affected chapter leaders need to agree on whether to support your development of this satellite region and if it should become independent or remain under the governance of the hub chapter.
- B. Determine current membership within geographical boundaries (provided by the Community Engagement team)
- C. Determine potential membership
- D. Determine potential leadership

Step 2. FORM STEERING COMMITTEE

- A. Establish essential committees
 - a. Bylaws (required for Chapters-in-Formation only)
 - b. Membership
 - c. Education
 - d. Budget and Finance
- B. Develop short- and long-range goals and objectives for each committee



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Step 3. SUBMIT REQUIRED CRITERIA TO BE EVALUATED AS A POTENTIAL CLUB

- A. Submit the following criteria to the Community Engagement team so they can present your proposed club to IBOD:
 - a. Proposed club name
 - b. Number of current members
 - c. Number of potential members
 - d. Proposed boundaries
 - i. If existing “hub” chapters will be affected by your “satellite” region becoming independent, include a letter from the affected chapter president outlining the potential impact and what support the hub chapter might need from MPI Global to replace those members.
 - e. Numbers of people interested in leadership positions and committee roles
 - f. The names and membership status of the people who currently make up your leadership team
 - g. First-year goals for membership, education, budget & finance committees, and the club/chapter’s annual operating budget
 - h. Long-range plans for membership, education, budget & finance committees
 - i. Additional info about plans if you’re approved (when you’ll have your first meeting, if you want to claim seed money, etc.)
- B. If the IBOD approves your application to become an MPI Club, then you have achieved provisional club status and are officially a chapter-in-formation. Once you have 40 members, you can apply for recognition as an MPI Chapter (Step 5), or you can choose to remain an MPI Club.



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Step 4. HOLD FORMATION MEETING

- A. Prepare meeting agenda
- B. Select date, time and location
- C. Confirm that involved people can attend
- D. Send out invitations
- E. Hold meeting to introduce your club/chapter to the local community
 - a. Share the MPI mission, vision and benefits of belonging
 - b. Explain why you wanted to bring MPI to this region, your club's history so far, and what your leadership team's vision for the future is
 - c. Answer questions, recruit new members and leaders, discuss next steps, and announce the next meeting/activity

Step 5. FILE APPLICATION FOR CHAPTER CHARTER

- A. Note: Clubs are not required to pursue the following steps and may remain a club while globally mandated club minimum standards are met. Because rebates for clubs are limited, and chapters receive greater support from global, most clubs opt to apply for a chapter charter within the first two years of formation.
- B. Once your club membership reaches 35 members, you can apply for a chapter charter and form a bylaws committee to create chapter bylaws. Before IBOD reviews your application, however, you must achieve 40 members with a plan to get to 100 members.
- C. Send criteria, goals, plans and membership lists (can be updated versions of what you submitted for club recognition) along with proposed chapter bylaws to the Community Engagement team for IBOD approval.
- D. If IBOD approves your application to become an MPI Chapter, you'll achieve provisional chapter status. Let the Community Engagement team



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know when you plan to hold your chapter charter meeting to celebrate so someone from MPI Global can attend.

Step 6. HOLD A CHAPTER CHARTER MEETING

- Prepare an agenda for the meeting
- Select date, time and location
- Confirm that involved people can attend (i.e., chapter board, local politician or government official, MPI Global staff)
- Pitch story/send invites to local media
- Send out invitation to members and larger community
- Hold meeting to celebrate your new chapter status!
 - a. Share the MPI mission, vision and benefits of belonging (can be delivered by MPI Global staff live or virtually)
 - b. Invite politician/government official to speak to the importance of the industry to local economy
 - c. Share your leadership team's journey thus far to form a MPI chapter and vision for the future
 - d. Install your board of directors
 - e. Answer questions, recruit new members and leaders, discuss next steps, and announce the next meeting/activity

Step 7. ESTABLISH CHAPTER OPERATIONS

- A. Apply for a Tax ID number, if required by your local government, and abide by local/region tax reporting guidelines and regulations.
- B. Submit Articles of Incorporation, if required by your local government, to form a nonprofit organization (equivalent to a US 501(c)(3) nonprofit).
- C. Connect chapter bank account to MPI Global Chapter Accounting Platform (QuickBooks Online).



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- D. Secure Directors & Officers insurance through MPI Global or local insurance broker.
- E. Set up MPI Chapter website through MPI Global.
- F. Meet chapter minimum standards as outlined in [MPI Global Policy](#).
- G. Keep chapter dashboards and financial records current (close out each month by the 15th of the following month).
- H. Regularly convene the board of directors to measure progress against goals and adjust strategy and budgets, as needed.
- I. Attend MPI Global calls and keep current with Chapter Leader Newsletters and other global announcements.
- J. Work with your leadership team to create an inclusive and welcoming environment that empowers and encourages all members to become potential chapter leaders, to keep your leadership pipeline full.
- K. Design experiences and activities that bring the MPI mission and vision to life by encouraging and empowering your members to learn, innovate, collaborate and advocate together as local representatives of a global community.

Are you ready to be a chapter champion?

If this feels like an adventure you'd like to take, let us know! Our Chapter Operations team is always excited to mentor new chapter champions and connect them to potential MPI allies and ambassadors residing nearby.



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Glossary of Terms

501(C)(3) NONPROFIT ORGANIZATION – Denotes the type of organization all U.S. MPI chapters are incorporated as and is the model for the incorporation of all non-U.S.-based chapters. Internationally, the terms may vary, but investigate if the closest equivalent in your country is a professional association, nonprofit organization, nongovernmental organization or a charitable organization. Filing and tax requirements will vary, but all MPI chapters and clubs are responsible for maintaining compliance with their local government and tax regulations.

ARTICLES OF INCORPORATION – A set of formal documents filed with a government body to legally document the creation of a corporation. They generally contain pertinent information, such as the organization's name, street address, and agents. They are required for Canadian and U.S. nonprofits. Ask your local government about the paperwork and forms required to incorporate as a nonprofit organization, or equivalent, in your region.

BYLAWS – A document created by a chapter's board of directors that outlines the way the chapter operates. MPI Global provides a template that your board can customize. Once bylaws are set, the board of directors may amend them and file new versions with MPI Global.

CHAPTER – Groups of 40 or more MPI members who live within a set geographic border and come together to learn, collaborate, innovate and educate.

CHAPTER AMBASSADOR – People who work with chapter champions to promote MPI membership and community activities in a region where there is a proposed club or chapter-in-formation.



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CHAPTER CHAMPION – Meeting and event professionals who work to promote the benefit of belonging to MPI with the aim of recruiting a core group of MPI members so a club or chapter can form.

CHAPTER CHARTER – MPI Global authorization to establish a new chapter in the region. Conferred by MPI's International Board of Directors, and subject to revocation if a chapter fails to meet the annual chapter standards required of all MPI Chapters.

CHAPTER DASHBOARDS – An online portal that displays chapter membership, volunteer engagement, educational activity and financial performance information.

CHAPTER-IN-FORMATION – Also known as an MPI Club, this is a group of MPI members who have at least 20 members and intend to apply for a chapter charter once they acquire a minimum of 40 members and have a strategy to reach 100 members.

CHAPTER LEADERSHIP TEAM – The volunteer leaders who serve on a chapter's board of directors. Terms of service run from January 1- December 31 on an annual basis. The list of who will serve on the board (board slate) is due annually in March.

- **BOARD OF DIRECTORS** – Group of people who create the chapter's short and long-term membership engagement strategies, supervise the chapter's activities, develop the annual budget and business plan and convene monthly to chart progress against these plans.
- **OFFICE OF THE PRESIDENT (OOP)** – A three-year term of service that begins in year one as the "President-Elect," proceeds as "President" in year two and concludes in year three with a term as "Immediate Past



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President.” These individuals drive the strategic and financial success of the club, preside over meetings and recruit other board members.

- VICE PRESIDENT (VP) – MPI Chapters fill out their board of directors with Vice Presidents who oversee core components of chapter strategy. Required VP positions include Membership and Finance. However, a chapter may add VP positions as its board of directors deems necessary. Here are the key components each VP oversees:
 - a. MEMBERSHIP – Develops strategies for membership recruitment, retention and recognition in the hub city as well as satellite regions that might be worth developing. Recruits committee members to activate the tactical membership plans.
 - b. EDUCATION – Develops strategies for educating current and future members in the region along an 18 to 24-month trajectory in adherence with the club’s budget. May collaborate with other associations, MPI Chapters/Clubs and strategic partners on events. Recruits committee members to activate tactical education plans.
 - c. FINANCE – Develops annual budget and strategies for increasing revenue and building reserves. Recruits committee members to activate tactical business development/sales and special event/sponsorship plans.
 - d. COMMUNICATIONS (OR MARCOM) – Develops marketing and communication strategies for raising awareness of all club/chapter activities in the region. Collaborates closely with the other committees to set deadlines and promotional calendars. Recruits committee members to activate tactical marketing and communications plans.
- DIRECTORS – To reduce the workload and increase volunteerism, VPs are encouraged to recruit Directors, who recruit committee members to



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help them perform the tactical work required to fulfill a chapter's short and long-term goals. Multiple directors and committees might report to one VP. For example, the VP of Membership might oversee the work of directors for student outreach, member recruitment, member retention and community engagement.

CHAPTER LEADER NEWSLETTER – A monthly newsletter for MPI chapter leaders that comes from MPI Global's Chapter Operations team and is filled with news from global, posted on the Chapter Leader Resource Page (CLRP).

CLUB – A group of 20 or more MPI members within an IBOD-approved geographic boundary who convene to learn, collaborate, innovate, advocate and fulfill the MPI Vision.

CLUB LEADERSHIP TEAM – The volunteer leaders who serve on a club's steering committee. Terms of service run from January 1-December 31 on an annual basis. The list of who will serve on the leadership team is due annually in March.

- **STEERING COMMITTEE** – Group of people who create the club's short and long-term membership engagement strategies, supervise the club's activities, develop the annual budget and business plan and convene regularly to chart progress against these plans.
- **CLUB CHAIR (ALSO KNOWN AS PRESIDENT)** – Drives the strategic and financial success of the club, presides over meetings and recruits other members of the steering committee.
- **MEMBERSHIP CHAIR (OR VP)** – Develops strategies for membership recruitment, retention and recognition in the hub city as well as satellite regions that might be worth developing. Recruits committee members to activate the tactical membership plans.



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- EDUCATION CHAIR (OR VP) – Develops strategies for educating current and future members in the region along an 18 to 24-month trajectory in adherence with the club’s budget. May collaborate with other associations, MPI Chapters/Clubs and strategic partners on events. Recruits committee members to activate tactical education plans.
- BUDGET/FINANCE CHAIR (OR VP) – Develops annual budget and strategies for increasing revenue and building reserves. Recruits committee members to activate tactical business development/sales and special event/sponsorship plans.
- COMMUNICATIONS CHAIR (OR VP) – Develops marketing and communication strategies for raising awareness of all club/chapter activities in the region. Collaborates closely with the other committees to set deadlines and promotional calendars. Recruits committee members to activate tactical marketing and communications plans.

CHAPTER OPERATIONS TEAM – MPI Global staff dedicated to MPI chapter and community support, comprising of Regional Operation Managers (ROMs) who oversee the operation and provide strategic guidance to MPI Regional Councils as well as chapter and club leaders.

DIRECTORS & OFFICERS (D&O) LIABILITY INSURANCE – Insurance that helps cover the defense costs, settlements and judgments arising out of lawsuits and wrongful act allegations brought against a nonprofit organization.

DUES – The annual fee individuals pay to MPI for membership benefits.

FORMATION MEETING – A meeting held to announce the formation of a new MPI Club.



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GEOGRAPHICAL BOUNDARIES – A region on a map, defined with clear boundaries.

“HUB” CHAPTER – An established MPI chapter willing to act as an anchor for the development of new regional education, activities and MPI recruitment efforts in satellite cities.

INTERNATIONAL BOARD OF DIRECTORS (IBOD) – Diverse professionals with varied backgrounds that represent the global MPI membership and manage the strategic direction for the association.

LEADERSHIP PIPELINE – Pool of potential leaders and committee members who can be recruited from a club or chapter’s general membership, trained and groomed for larger roles and responsibilities matched to their interests and talents.

MPI MEMBERSHIP LEVELS

- **ESSENTIAL MEMBER** – The least expensive membership option with digital-only benefits, and no chapter affiliation (all Essential Members are members at large).
- **PREFERRED MEMBER** – The most common membership option, and the least expensive one to come with chapter affiliation as well as digital benefits. If a preferred member doesn’t choose affiliation with a chapter, they can choose to remain “At Large.”
- **PREMIER MEMBER** – A premium membership option that comes with VIP perks as well as digital and chapter affiliation benefits. If a premier member doesn’t choose affiliation with a chapter, they can choose to remain “At Large.”



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- **AFFILIATE MEMBERSHIP** – A membership to a second MPI club or chapter, which can be added to any premiere or preferred membership. Entitles the bearer to benefits at more than one club or chapter.
- **CORPORATE MEMBERSHIP** – Packages of five or more discounted annual memberships may be purchased by a company and given to employees. Because memberships belong to the individual, if an employee leaves before their membership year is up, the company may reassign MPI membership benefits to a different employee at no charge.

MPI MEMBERSHIP CATEGORIES

- **FACULTY** – Someone who works as a professor or adjunct professor at a college, university or other institution of higher learning.
- **PLANNER** – Someone whose main job function is meeting and event management or managing teams of meeting and event organizers.
- **SUPPLIER** – Someone who works for a company that provides goods and services to meeting and event managers.
- **STUDENT** – A student of hospitality, tourism, and/or event management.

PRINCIPLES OF PROFESSIONALISM – All MPI members and chapter leaders are bound to abide by this [code of ethics](#). Violations may be reported anonymously through the MPI Global site.

PROVISIONAL CHAPTER STATUS – A three-year period following IBOD approval, during which a chapter's charter could be revoked if it fails to meet the annual chapter minimum standards. However, even after MPI Chapters pass this provisional period, they must continue to meet minimum standards on an annual basis.



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QUICKBOOKS ONLINE – The chapter accounting platform utilized by all MPI Chapters.

“SATELLITE” REGION – A city or region where there is a concentration of MPI members that might be grown and developed if activities were to occur there. Typically, a promising satellite would have a concentration of businesses or MPI members that could be grown. Clubs or chapters can develop satellite regions within their geographical boundaries in order to grow their own membership or to help new chapters and clubs form. MPI Global suggests that a steering committee be formed for each satellite region that reports to the hub’s board of directors.

SEED MONEY – Upon IBOD approval, new clubs and chapters receive a one-time payment to help offset start-up costs.

STEERING COMMITTEE – See CLUB LEADERSHIP TEAM

TAX ID NUMBER – A number issued by a governmental body to identify an organization for tax purposes. Must be obtained if a club or chapter’s governing tax body requires it.