



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

Updated August 2020



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 can 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. MPI has a global community of 60,000 meeting and event professionals including 15,000 engaged members. It has nearly [70 chapters and clubs](#), with members in more than 70 countries worldwide.

Each of our MPI chapters and clubs is run like a small business by its volunteer leadership team. Annually, these MPI leaders produce more than 600 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.



Chapter Champion Guide to MPI Club/Chapter Formation

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 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 around the world.

How MPI operates

As a potential MPI club or chapter leader, it's important that you understand the guiding principles that all our leaders observe, because each club and chapter bases the way it operates on meeting the standards outlined in the [MPI Global Policy Manual](#). 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.

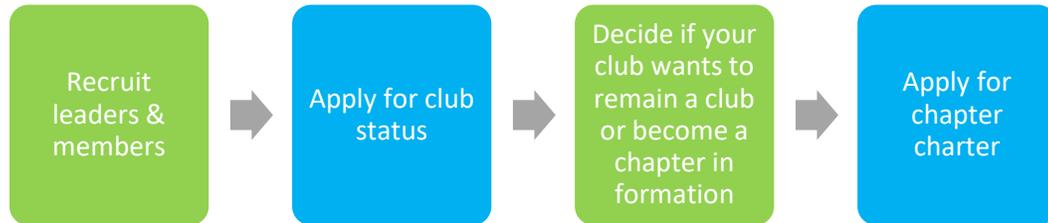
MPI Global's Community Engagement team, which works in remote offices around the world, oversees all elements of chapter operations, from chapter leadership training to new chapter development. When you're ready to make the commitment to become a chapter champion, we mentor you through the process and present your application to IBOD when you're ready to become an official club and/or chapter. Afterwards, we provide strategic advice and guidance to your volunteer leadership team (steering committee/board of directors). Each club and chapter operate as an independent business unit of MPI, which means that your steering committee or board of directors will be responsible for the club/chapter's overall health, financial stability and adherence to local laws.



MPI Chapter Champion Guide to MPI Club/Chapter Formation

MPI Clubs vs. MPI Chapters: Which one is for best for you?

This is the overall chapter formation process.



Although this guide outlines the full seven-step process of becoming an MPI Chapter, clubs can opt to remain clubs. Here are the ways in which clubs and chapters are alike, and how they differ.

MPI CLUB	MPI CHAPTER
Needs name, geographic boundaries & application to be approved by IBOD	Needs name, geographic boundaries & application to be approved by IBOD
Exists to fulfill the global MPI Mission & Vision	Exists to fulfill the global MPI Mission & Vision
Needs to adhere to MPI Global club minimum standards as outlined in the MPI Global Policy Manual .	Needs to adhere to MPI Global chapter minimum standards as outlined in the MPI Global Policy Manual .
Minimum 30 members. Two-thirds of the club membership must reside within the primary location (main population source within determined boundaries) or as otherwise authorized by IBOD.	Minimum 50 members with a potential to reach 125 members. Two-thirds of the chapter membership must reside within the primary location (main population source within determined boundaries) or as otherwise authorized by IBOD.
Quarterly activities suggested.	Minimum 6 educational events/year.
Rebates limited to first 24 months after IBOD recognition.	Rebates continue for lifetime of chapter, unless otherwise determined by IBOD.
Adheres to local tax & legal nonprofit/NGO filing requirements. A copy of the club's annual financial report and any mandatory governmental filings/returns need to be filed with MPI Global within ninety (90) days.	Adheres to local tax & legal nonprofit/NGO filing requirements. A copy of the chapter's annual financial report and any mandatory governmental filings/returns need to be filed with MPI Global within ninety (90) days.



MPI

Chapter Champion Guide to MPI Club/Chapter Formation

MPI Club (continued)	MPI Chapter (continued)
<p>Do not use bylaws, a formal set of rules that defines an organization's operation. However, MPI Global provides a template clubs can use to create proposed bylaws if they want to apply to become a chapter.</p>	<p>All chapter bylaws, other than MPI chapter minimum bylaws or formal documents required by applicable governments other than bylaws, must initially be approved by the MPI President/CEO or his/her designee and subsequently by the chapter's membership. Any name changes or territorial boundaries must be approved by IBOD, prior to being submitted to chapter membership for approval. Updated bylaws are filed with MPI Global.</p>
<p>Annual budget and quarterly activity reports filed with MPI Global. Templates for annual event calendar and business plan templates are available.</p>	<p>Annual budget, business plan, event calendar and compliance documents filed with MPI Global. Monthly financial reports need to be closed by the 15th of the following month.</p>
<p>Receives the following forms of support from MPI Global:</p> <ul style="list-style-type: none"> • Assigned COM • Chapter leader newsletter & invitations to leader calls • Marketing materials • Membership support • Chapter leader education • MPI logo • Chapter website • Eligible for MPI Foundation grants 	<p>Receives the following forms of support from MPI Global:</p> <ul style="list-style-type: none"> • Assigned COM • Chapter leader newsletter & invitations to leader calls • Marketing materials • Membership support • Chapter leader education • MPI logo • Chapter website • Eligible for MPI Foundation grants • Directors and officers insurance • Chapter accounting platform with financial reporting tools • Eligible to earn chapter incentives for high-performance • Association management/customer relationship management systems (in development)



Chapter Champion Guide to MPI Club/Chapter Formation

Regional considerations

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 sell [corporate memberships](#), which benefit employers as well as their 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. Corporate memberships also might be an easier sell in regions where companies, rather than individuals, make the decision to invest in association membership.

To optimize the perceived value of your club or chapter's activities, the Community Engagement team recommends that you seek to maintain a 50/50 balance between members who manage meetings and events (Planner Category) and those who sell meeting/event goods, services and venues (Supplier Category). Seek to create a culture of inclusion, one where all members feel equally valued and are encouraged to develop long-term vs. transactional relationships.

The international business language of MPI clubs and chapters is English, however chapters and clubs often produce content in other languages. Partnering with chapters and clubs that share a language with your own is an effective way to enhance what you offer your membership and nurture international business connections.

Step-by-step guide to club and chapter formation

This is an outline of the seven steps involved in the full club and chapter-information process. If you want to pursue this path, we've provided contact information for the Community Engagement team member assigned to your



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region at the end of this section. There is also a glossary of terms to help you understand any that might be unfamiliar 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. MPI’s International Board of Directors will need to approve these proposed boundaries when you apply for club recognition and will need to approve any change thereafter.
- B. Determine current membership within geographical boundaries (provided by the Community Engagement team)
- C. Determine potential membership
- D. Determine potential leadership for the club’s steering committee

Step 2. FORM STEERING COMMITTEE

- A. Establish essential committees
 - a. Membership
 - b. Education
 - c. Budget and Finance
 - d. Bylaws (only needed if club aspires to become a chapter, and may be formed after Step 4)



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- B. Elect chairs to lead each committee. However, if your club aspires to become a chapter one day, consider aligning your steering committee leadership to the board positions chapters use, and elect a president to preside over the steering committee and vice presidents to oversee each individual committee.
- C. Develop short- and long-term goals and objectives for each committee

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-term plans for membership, education, budget & finance committees



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- i. Additional information about plans if you're approved (when you'll have your first meeting, if you want to claim start-up funds, etc.)
- B. If IBOD approves your application to become an MPI Club, then you have achieved club status. Once you have achieved 45 members, you can apply for recognition as a chapter-in-information. You will have a year to apply for recognition as an MPI Chapter (Step 5).
- C. Because clubs only receive rebates for the first two years, most clubs apply for a chapter charter. However, you can choose to remain an MPI Club indefinitely, and end your formation process with Step 4.

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 steering committee'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. Once your club membership reaches 45 members, you can apply for IBOD recognition as a chapter-in-information. Once recognized as a chapter-in-information, you will have 12 months to meet the standards required for a chapter charter. If you haven't already, form a bylaws committee to create chapter bylaws, recruit potential chapter board



Chapter Champion Guide to MPI Club/Chapter Formation

members, and develop a plan on how to get to 50 members, short-term, and 125 members, long-term.

- B. Update the criteria, goals, plans, leadership and membership lists submitted for club recognition to create your chapter application. Submit with your proposed chapter bylaws to the Community Engagement team for IBOD approval.
- C. If IBOD approves your application to become an MPI Chapter, you'll achieve conditional chapter status. Let the Community Engagement team know when you plan to hold your chapter charter meeting to celebrate so someone from MPI Global can attend.
- D. Chapters are conditional for three (3) years. At the end of two (2) years, the chapter must have consistently met the minimum standards for chapter performance. In the event minimum standards have not been met, a remedial action plan will be created. At the end of three (3) years, if minimum standards have not been met, the chapter surrenders its charter. It is still eligible to remain a club, with less stringent operating standards, and may reapply for chapter charter at any time the conditions have been met for application.

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!



Chapter Champion Guide to MPI Club/Chapter Formation

- 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 MICE industry to local economy
- c. Share your leadership team's journey thus far to form an 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 and ProfitKeeper).
- 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 Manual](#).
- 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.



Chapter Champion Guide to MPI Club/Chapter Formation

- 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 become a chapter champion?

If this feels like an adventure you'd like to take, contact the Community Engagement team member in charge of your region.

- United States: Belinda Cottrell, bcottrell@mpi.org
- Canada: Marcelo DeOliveira, mdeoliveira@mpi.org
- Other Regions: Federico Toja, ftoja@mpi.org

Thank you so much for your interest in creating a new MPI club or chapter. We look forward to connecting with you!

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.

ASSOCIATION MANAGEMENT/CUSTOMER RELATIONSHIP MANAGEMENT SYSTEMS – Tools MPI Global provides chapters to help them keep track of member, sponsor and other customer data and engagement activities. Currently in development.

BOARD OF DIRECTORS – A chapter’s leadership team. Terms of service run from July 1-June 30 on an annual basis. The list of who will serve on the board (board slate) is due annually in March, and all volunteers must be MPI Members.

- **OFFICE OF 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



Chapter Champion Guide to MPI Club/Chapter Formation

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 those for Education, Membership, Finance and Communications. 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 MARKETING/COMMUNICATIONS) – 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 Champion Guide to MPI Club/Chapter Formation

- **DIRECTORS** – To reduce the workload and increase volunteerism, VPs are encouraged to recruit directors, who recruit committee members to 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.

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 – A group of 50 or more MPI members within an IBOD-approved geographic boundary who convene to learn, collaborate, innovate, advocate and fulfill the MPI Vision of leading and empowering the meeting and event community to change the world.

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. Often volunteer to serve on a club's steering committee or a chapter's board of directors.

CHAPTER ACCOUNTING PLATFORM & FINANCIAL REPORTING TOOLS – MPI Global provides chapters software to track budget expenses, revenues and reserves and export monthly financial reports. Chapters use QuickBooks Online (or regional equivalent) and ProfitKeeper.



Chapter Champion Guide to MPI Club/Chapter Formation

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 – An MPI Club that has 45 members and has indicated to IBOD that it intends to apply for its chapter charter. Once recognized, the club has twelve months to meet the standards required and apply for its chapter charter, or it will remain a club.

CHAPTER LEADER NEWSLETTER – A monthly newsletter for MPI chapter leaders that comes from MPI Global's Community Engagement team and is filled with news from global.

CLUB – A group of 30 or more MPI members within an IBOD-approved geographic boundary who convene to learn, collaborate, innovate, advocate and fulfill the MPI Vision of leading and empowering the meeting and event community to change the world.

COMMUNITY ENGAGEMENT TEAM – MPI Global staff dedicated to MPI chapter and community support, comprising Chapter Operation Managers and



Chapter Champion Guide to MPI Club/Chapter Formation

Directors (COMs) who oversee the operation and provide strategic guidance to MPI chapter and club leaders around the world.

CONDITIONAL 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 conditional period, they must continue to meet minimum standards on an annual basis. Any conditional chapter unable to meet the standards will become a club and may reapply for chapter recognition when able to meet the requirements.

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.

GEOGRAPHICAL BOUNDARIES – A region on a map defined with clear boundaries. Must be approved by IBOD.

“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 to either grow the existing chapter or form new clubs/chapters.

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



Chapter Champion Guide to MPI Club/Chapter Formation

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 – When an individual joins MPI, they have the choice of enrolling at different price points that give them access to [membership benefits](#), with or without chapter affiliation.

- [INDIVIDUAL MEMBERSHIP](#) – Benefits remain the same internationally, but price may vary based on the member’s country of origin and whether they want digital-only benefits, affiliation with a chapter or VIP perks.
- [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.

Additionally, there are four 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.



Chapter Champion Guide to MPI Club/Chapter Formation

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

PROFITKEEPER – An online financial reporting system provided to all MPI Chapters that allows chapters to benchmark performance and view a snapshot of their financial performance online.

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. 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.

START-UP FUND – Upon IBOD approval, new clubs and chapters receive a one-time payment of USD \$1,000 to help offset initial costs.

STEERING COMMITTEE – An MPI Club’s leadership team. Terms of service run from July 1-June 30 on an annual basis. The list of who will serve on the leadership team is due annually in March. All volunteer leaders need to be MPI Members. Essential committees are: Membership, Education, Budget/Finance, and (if the club will apply for a chapter charter) Bylaws.

TAX ID NUMBER – A number issued to organizations for tax reporting purposes in some countries.