



MPI Guide for Chapter to Club Transition

Updated September 2023

Introduction

Per Chapter bylaws, all chapters must have a minimum of 40 members to maintain chapter status. When chapter memberships decline, or the sustainable operations of the chapter is threatened, this guide provides the steps involved to transition from “Chapter” status to “Club” status. This is a step-by-step guide for MPI board members to move through a “Chapter” to “Club” status change. A detailed chart of the differences between MPI Clubs and Chapters is in the appendix following this guide.

Step 1: Recognize warning signs

Warning signs that a chapter is not sustainable include declining membership, incomplete board slates, financial insolvency, lack of volunteer engagement, lack of a succession pipeline, lack of member engagement, and declining chapter programs (in quality and/or quantity). When a chapter reaches the 50-member threshold or displays other warning signs, the Chapter's board will work with its Regional Operations Manager or Director (ROM) to establish an action plan to correct the identified barriers to sustainable chapter operation.

Step 2: Create an action plan and timeline for change

Transitioning to a Club can be a positive move, as it relieves its volunteer leaders from some of the obligations required with chapter operation, and it may give the board much-needed space to develop new strategies for growth and member engagement. However, it is not a choice to be made lightly. Before deciding to become a Club, work with your ROM to develop an action plan to reverse downward trends to see if you can effect positive change within your current chapter structure. Set specific, measurable, achievable, relevant and time-based (SMART) goals that chapter leaders can follow as a course-correction strategy and document these steps

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in an action plan. Set a definitive end-time to reevaluate progress (ex., six months) to demonstrate positive movement, before committing to Club downgrade.

An action plan includes:

- SMART goals for each identified issue with deadline for achieving milestones and name of person responsible for overseeing execution of tactics
- Tactical plan needed to achieve each SMART goal with deadline for deliverables and name of people responsible for activating each tactic

A good action plan template is the “Business Plan Template” document found on the Chapter Leaders Resource Page

Collaborate with your Regional Council and ROM to establish the action plan. Follow the action plan and review progress with your ROM on a monthly basis. Hold board members accountable for progress made or actions not taken. If the situation improves, maintain the discipline of the action plan to keep your chapter on solid ground for at least the next year. If progress is not made, then proceed with the Club downgrade process.

Step 3: Submit “Chapter transition to Club” notification to MPI’s International Board of Directors (IBOD)

Create a letter with the following information outlining why your chapter should be downgraded to a Club. Include:

- Number of current members
- Efforts being made to increase membership
- Reasons impacting membership decline



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- Dashboard information
- Financial trends
- Other information critical to understanding the current situation (no board engagement, lack of volunteers, financial insolvency, etc.)

Send this letter to your ROM so they can present notification to the IBOD. The IBOD must vote on any changes to chapter names, status or geographic boundaries.

If the request is approved, then the membership must be informed of the decision. If the request is not approved, follow recommendations issued by your ROM.

Step 4: Hold a General Assembly to Notify the Membership

Members must be informed of your chapter board's decision to become a Club. The purpose of this meeting is to inform members of their right to change affiliation and to encourage them to become active participants in your Chapter's recovery.

Hold a live or digital general assembly meeting to tell members why the chapter will become a Club and encourage them to continue their involvement with the Club. Include time to allow members to ask questions and understand why this is happening. Reinforce the positives of the situation (this is an opportunity for growth and reorganization) and encourage membership to be part of the new Club. To ensure full coverage, follow up by email with all members.

Inform members of their right to change chapter affiliation, become an "at large" member or downgrade their membership to Essential (digital-only Global benefits). If they desire to make this change, have them send their request to feedback@mpi.org.

A Club can reapply for chapter status after 18 to 24 months, after demonstrating that the previous threats to its sustainability have been addressed, membership has



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reached the 40-member mark, and there is a plan on how the chapter will achieve 100 members. Refer to the Chapter in Formation Manual for the process to follow in applying for a Chapter charter. This guide is available from the Chapter Leader Resource Page > Office of the President.

Step 5. Build a Sustainable Club

Refer to the MPI Guide for Sustainable Club Operations to rebuild your leadership team and member engagement strategy, so that your Club can thrive and grow. The guide is available from the Chapter Leader Resource Page > Office of the President.

Appendix: The difference between an MPI Club and Chapter

MPI CLUB	MPI CHAPTER
Needs name, geographic boundaries & application to be approved by the IBOD	Needs name, geographic boundaries & application to be approved by the 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 Policy Manual.	Needs to adhere to MPI Global chapter minimum standards as outlined in the MPI Policy Manual.
Minimum 20 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 40 members with a potential to reach 100 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 4 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.	Adheres to local tax & legal nonprofit/NGO filing requirements.



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<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 ROM • Chapter leader newsletter & invitations to leader calls • Marketing materials • Membership support • Chapter leader education • MPI logo • Club website • Eligible for MPI Foundation grants 	<p>Receives the following forms of support from MPI Global:</p> <ul style="list-style-type: none"> • Assigned ROM • Chapter leader newsletter & invitations to leader calls • Marketing materials • Membership support • Chapter leader education • MPI logo • Chapter website • Directors and officer's insurance with cost • Chapter accounting platform with financial reporting tools • Eligible to earn chapter incentives for high-performance • Eligible for MPI Foundation grants