



MPI Guide to Sustainable Club Operation

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Introduction

Congratulations on becoming an official MPI Club! Because clubs are self-functioning, self-governing local units of [MPI](#), the organizational and financial health of your club will depend on the strength and coordinated efforts of your volunteer leaders. That's why we developed this blueprint for sustainable club operation.

We've broken down the advice in this guide to align with the different committee positions you should have in place, as well as additional committees you may want to add if your club aspires to become a chapter. We've also included some advice from past MPI Club presidents to provide additional inspiration on how to grow and best serve your club's members.

The relationship between MPI Global and its clubs and chapters

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 meeting and event professionals. It has nearly [70 chapters and clubs](#), with members worldwide.

All MPI clubs and chapters exist to fulfill the [MPI vision and mission](#). 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.

All MPI members and volunteer leaders pledge to abide by [MPI's Principles of Professionalism](#), our association's code of ethics. You can read more about MPI and our core values [here](#). Clubs and chapters operate on a calendar fiscal year from January 1 – December 31.

Your connection to MPI Global is your Regional Operations Manager or Director (ROM). ROMs provide strategic advice and guidance to our global network of chapter and club leaders. Don't hesitate to contact us for help or advice.

Steps to set your club up for success

Once your application as an MPI Club has been approved by MPI's International Board of Directors (IBOD), the chair of the steering committee/MPI Club President should work with his/her leadership team to complete the following items within the first three months.

- **File for recognition as a legal entity** as a nonprofit, or your country's equivalent to a not-for-profit charitable, educational or social organization/professional society/non-governmental organization (NGO).
- **Open a bank account.**
 - This is required before MPI Global can provide your club its start-up funds (USD \$1,000.00), which will be wired to the bank account.
 - A bank account is also required to receive membership rebates.
 - Rebates are a percentage of membership dues from a club or chapter's paid members and are intended to be used as marketing funds to promote MPI membership and help you attract new members.
 - Clubs only receive rebates for the first two years after IBOD recognition, however that is not a restriction for chapters, which is one reason why most clubs apply for a chapter charter within their first two years. MPI Global remits membership rebates within thirty (30) days following the end of each calendar month.
- **Finalize what the steering committee will look like and recruit for open positions.**
 - The essential committees are Membership, Education, Budget/Finance and Bylaws (if your club will eventually apply to become a chapter). This leadership team comprises an overall chair and essential committees, also led by chairs.
 - You can add committees to handle special areas of focus (for example: Marketing/Communications, Special Events, Community Outreach, etc.).
 - If you know your club will apply to become a chapter soon, you can model your steering committee after a chapter's board of directors with committees led by vice-presidents instead of chairs and a president overseeing the board as a whole.
- **Hold a Formation Meeting to mark the official start of the club and present the steering committee to local membership.**



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- All members of the steering committee must be active MPI Members and remain active members during their term of service.
- Invite a representative from MPI Global to attend this event in-person or virtually and create a press release for local media. Also consider inviting local government officials, and members of the larger meeting and events community. This can be a recruiting opportunity as well as your club's official debut.
- **Use MPI Global-provided marketing tools** (official club logo, website, membership brochures, etc.).
 - Marketing materials and toolkits provided by MPI Global will help you create MPI brand awareness and attract new members.
- **Attend onboarding calls with Regional Operations Manager or Director (ROM)**
 - Make sure your volunteer leaders are trained on using MPI Global tools and resources, such as the [Chapter Leaders Resource Page \(CLRP\)](#) and attend solution-room calls.
- **Create an annual business plan, budget and events calendar with the steering committee.**
 - Share these annual documents with your ROM.
- **Meet regularly with your steering committee to track progress and adjust plans, as needed.**
 - Achieve minimum club standards by filing a quarterly activity report with your Regional Council detailing your financial and club activities and membership growth.

Committee leader best practices

The essential steering committees are membership, education, budget/finance and, if your club intends to become a chapter, a bylaws committee. It is also helpful to have a committee to handle event and membership marketing and communication. Here are tips on where club leaders should focus their energy, by their area of focus.

MPI Club Chair/President

The club steering committee chair/president is responsible for the overall strategy, activity, growth and performance of the club and encouraging club members to become volunteer leaders. This leader should focus on developing a high-performing leadership team that



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collaborates and communicates well together and aligns committee goals to the MPI Global vision and mission.

- Complete MPI Global chapter leader training and attend MPI Global “All Hands” and solution room calls. Make sure other club leaders complete their training and are attending role-specific calls.
- Schedule annual general meeting/retreat with steering committee to determine strategy and direction of club, using MPI Global templates. Submit annual business plan and budget.
- Preside over all steering committee/board meetings. Review quarterly progress against business plan and adjust, as needed.
- Read chapter leader newsletters. Share relevant news with other club leaders.
- Create succession plan and recruit/develop club leaders. Make sure they complete MPI Global leadership training.
- Forge strategic partnerships with local associations, influencers and other organizations or individuals that can help expand club growth and brand awareness.
- Local Champions lead the strategy. Hub and spoke model can be a suggestion and a special document is available for local development.
- Find new influencers for growth and brand awareness.

Membership Committee

The chair is responsible for strategies that recruit and retain club members and promote the value of MPI membership. Recruit committee volunteers who can handle tactical plans for member engagement and help with marketing efforts if there isn't a marketing/communications committee.

- Complete MPI Global chapter leader training and attend membership solution room calls.
- Read the monthly MPI Chapter Leader Newsletter so you know about current membership offers, brochures, marketing material and special trainings.
- Set an achievable annual membership growth and retention goals based on MPI Global statistics, develop a strategy on how to achieve this growth and a tactical plan to support recruitment and retention strategies. Document this in the club's annual business plan.



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- Review and adjust the plan, as needed, during steering committee meetings.
- Include tactics like welcoming new members, promoting social and educational events to nonmembers, exhibiting at local trade fairs, celebrating membership milestones, and other recruitment and retention activities.
- Seek to create a 50-50 balance between meeting manager/buyer (planner) and sales (supplier) members.
- Utilize membership best practices, toolkits and promotional resources housed on the [Membership section of the CLRP](#).
- Share [member benefits](#) with potential members and remind members to take advantage of them throughout the year.
 - Key benefits include the hours of free educational content provided by [MPI Academy webinars and on-demand education](#) and affiliation with an [MPI Community](#).
 - Remind members they are eligible to apply to serve on [international volunteer opportunities](#), [MPI hosted buyer events](#) and [MPI Foundation](#) grants for membership, education and event scholarships.
 - Work with MPI Global's regional advisory council to develop long-term growth strategies and mentorship opportunities.
- Form strategic partnerships with other associations.
 - Explore opportunities to collaborate on and co-produce education, social and business events that might reach a new audience of potential members.
 - Promote student and faculty memberships to local universities and colleges.
 - Exhibit at local trade fairs to promote the value of MPI membership.

Education Committee

The chair of this committee should assemble a team that can assist in producing a minimum four educational events a year that are planned well in advance, so they can be promoted effectively. Because education is a powerful recruiting tool, the efforts of this committee should be coordinated with the membership committee. If desired, a special events committee can be formed to manage non-educational events.

- Complete MPI Global chapter leader training and attend education solution room calls.



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- Read the monthly MPI Chapter Leader Newsletter so you know about current MPI Global and MPI Foundation resources for chapter and member education, as well as related scholarships.
- Develop an annual calendar of events.
 - Present a minimum of four (4) events per year (face-to-face, hybrid or digital).
 - Focus on providing education that adds member value and ROI, using survey data about what topics are of interest to your local community.
 - Utilize the resources available on the [education section](#) of the Chapter Leader Resource page to design engaging events and educational experiences.
 - Add networking events for members to socialize and create business connections, and fundraising events that can benefit the club as well as the [MPI Foundation](#).
 - Learn about the [key industry certificate programs](#) MPI Academy offers. Clubs and chapters can partner with the academy to present certificates locally and apply for MPI Foundation [chapter education grants](#).
- Discuss programs with local universities. Are they interested in presenting MPI curriculum, forming a student club or accrediting an educational program you create for your membership or young professionals?
- Find inspiration while investing in your own professional development by attending [MPI Global events](#) or free webinars and digital events produced by the [MPI Academy](#).

Budget/Finance Committee

The chair of this committee is responsible for developing the annual budget and strategies for revenue growth, with the goal of creating a self-sustaining business unit with reserves in the bank. Additionally, the chair or another volunteer on this committee often is tasked with dashboard data entry duties for the club if they're not outsourced to a paid or volunteer chapter administrator. The chair is responsible for making sure the club follows generally accepted accounting practices and adheres to local regulations regarding annual tax and financial filings.

- Complete MPI Global chapter leader training and attend solution room calls.
- Read the monthly MPI Chapter Leader Newsletter so you are aware of global updates.
- Use the [finance](#) and [administration](#) resources provided on the Chapter Leader Resource Page.



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- Develop annual budget and review regularly with the steering committee. Adjust as needed to keep club cash flow positive.
- Develop strategies for revenue growth that can support club activities as well as build reserves. Recruit committee members, as needed, to manage business development efforts (ex., partnerships/sponsorships, special events, fundraising, etc.).
- Submit quarterly dashboard reports on March 1, June 1, September 1 and December 1.
Include:
 - Meeting attendance (member/nonmember)
 - Membership growth
 - Education evaluation scores
 - Outreach activities/new member recruitment efforts
 - Club activities/retention efforts
- Follow local laws on closing fiscal year and filing for tax or regulation purposes. If necessary, hire a professional accountant. Send a copy of end of year financial report and any filing documents to ROM.

Bylaws Committee

The chair of this committee is responsible for creating bylaws that will define chapter operations, based off the template provided by MPI Global. This committee does not need to be formed until a club's steering committee has determined that it wants to apply for a chapter charter.

- Create proposed chapter bylaws, using the template provided by MPI Global.
- Get bylaws approved by the steering committee.
- Submit bylaws with chapter charter application to your ROM so they may be reviewed and approved by MPI Global's International Board of Directors.

Marketing & Communication

The chair of this committee is responsible for promoting club education and membership activities and recruiting volunteers who can help with different aspects of the tactical marketing plan. If this committee doesn't exist, then the following activities may need to be managed by volunteers on the membership and education committees.



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- Complete MPI Global chapter leader training and attend marketing/communication solution room calls.
- Read the monthly MPI Chapter Leader Newsletter so you are aware of current MPI Global membership and event offers, marketing resources and toolkits, member value-enhancing events and chapter challenges.
- Use the MPI Global-provided [chapter marketing toolkits](#) and [marketing resources](#) housed on the Chapter Leaders Resource Page.
- Collaborate with the membership and education committees to create a tactical marketing plan.
- Adhere to MPI Global brand standards when developing marketing materials and using the MPI logo.
- Recruit committee members who can handle different aspects of your club's marketing and communication needs. For example: social media, press releases, media relations, chapter newsletter, blogs, testimonial gathering, trade show partnerships, etc.
- Encourage members to join the forum and opt-into communities of interest.

Next steps

- Submit quarterly activity reports by the 1st of the month in March, June, September and December.
- Keep an eye on the following success metrics, and address any challenges with your steering committee/board of directors and ROM:
 - Monthly retention as compared with MPI Global standards
 - Monthly membership ratio (members gained minus members lost)
 - Total number of members
 - Financial status
 - Volunteer participation ratio (total members/total volunteers)
 - Leadership factors
 - Legal compliance
- Recruit potential new club leaders throughout the year. Submit your steering committee leadership/board slates by August 1 annually.



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- Meet with incoming club leaders in the spring and create your annual business plan and budget. A calendar template is available on the CLRP if you want to create an 18-to-24-month calendar for your club events.
- Encourage all your leaders to attend the annual Chapter Leadership Summit and complete their onboarding and role-specific leadership training.
- Do you want to become an official MPI Chapter? Once you have 35 members, your club can apply to be recognized as a chapter-in-information. You'll have 12 months from that time to meet the requirements for applying for a chapter charter, which include having 40 registered members and a strategy to reach 100 members. Contact your COM when you're ready to take that step.

Words of wisdom from MPI Club presidents

MPI Turkey President Feyhan Kaprali (2019-2020/2020-2021)

"The structure of the board [or steering committee] is very important. Traditionally we had senior industry leaders on the board. We have now decided to have younger members join us as trainees and/or directors to prepare them for future boards as their enthusiasm [and] new ideas are important and enlightening.

"We need to prioritize one or two goals for each term to engage and to motivate the members [and] attract new members. Understandably, we tend to be very excited in the beginning of a new board term with many ideas and projects. If we do not focus, a year passes by fast without achieving most of our goals. In Turkey, we decided that our priority will be education as MPI is truly very strong in educational programs.

"We are now trying to be very active in the local industry, partnering with other associations such as SITE, ILEA or other local associations for joint social events and/or participating within industry related platforms.

"Finally, participation at MPI Global events is very important, especially for board members to meet with other members and benefit from lectures and seminars. I have attended many other industry events and meetings of this kind, but personally I was very impressed by the content



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and structure of MPI Global events such as EMEC and WEC, whether it is virtual and/or in-person.

“Although MPI is a very strong US-based association, regional cooperation (in our case it is with European chapters) is very valuable, as we have similar issues and challenges.”

MPI Brazil President Ney Neto (2018-2019)

“I’ve been part of the MPI Brazil Club for several years, and I had the chance to serve the community as president of the local club and as VP of communications. I would say, based on [my] local experience that building a sustainable and long-lasting club relies on attracting thought leaders in the industry to your group.

“Our community here gathers university teachers, renewed MICE professionals, and inspiring people.

“MPI Global events provide high-level education for meeting planners and students who are aiming to develop an international career. [Local club events] offer concrete business opportunities for the club members, with networking opportunities and events.”

In closing

Thank you for volunteering your time and energy to ensure your MPI Club is successful. Please don’t hesitate to contact your ROM with any questions or concerns.

ENCLOSED ATTACHMENT: MPI Global Policy Manual excerpt: “Article IV: Chapters/Clubs/Other Organizations”



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CHAPTERS/CLUBS/OTHER ORGANIZATIONS (extracted from [MPI Global Policy Manual](#))

SECTION 1. CHAPTER/CLUB GENERAL REQUIREMENTS: A potential Chapter/Club of MPI shall apply for a charter subject to the following criteria:

1.1 CHAPTER/CLUB APPROVAL: An application for new Chapter/Club shall be subject to the approval of MPI International Board of Directors.

1.2 CHAPTER/CLUB BOUNDARIES: New Chapter/Club geographical boundaries shall be determined by the MPI International Board of Directors to facilitate the regular attendance of members at Chapter/Club meetings and to further the educational objectives of MPI. Geographical boundaries should be established which would minimize travel for the greatest number of members within the geographical boundaries. When established Chapters/Clubs are in existence, jurisdiction shall be clearly defined at a suitable boundary between existing and proposed new Chapter/Club before a charter is granted.

1.2.1 CHAPTER NAME AND GEOGRAPHICAL BOUNDARY CHANGES: Requests by chapters for a change in chapter name or geographical boundary must be approved by the MPI International Board of Directors before being submitted to the chapter membership for approval. Further, the MPI International Board of Directors, in the best interest of MPI and its membership, may require any chapter to change its name and/or its territory and they shall have full authority to revoke the charter of any chapter for noncompliance.

1.3 REIMBURSEMENTS: The Chapter/Club will be entered into MPI records the first day of the month following charter with the first dues reimbursement to be paid the last day of the month following charter.

1.4 MEMBER ASSIGNMENT: Members in defined Chapter/Club areas shall be assigned to Chapter/Club membership by MPI Global if no chapter affiliation is indicated in a new member application. However, a member may request transfer to a different chapter in writing. No dues for the transferred member shall be paid to the affected Chapter/Club until the next renewal anniversary of the member.

1.4.1 An individual may be a member of only one chapter but may pay an additional fee to be placed on another chapter's mailing list if that is the chapter's practice. A nonmember is not eligible for such subscriber membership. A subscriber member of another chapter will receive chapter correspondence such as chapter newsletters, e-mail 6 correspondence, monthly education information and other items determined by the chapter. If a member is



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placed on the mailing list of another chapter, it is up to the chapter to contact MPI Global to ensure membership. Any member of MPI shall be eligible to attend all chapters' general membership meetings at the member fee. Any member attending a meeting at a chapter shall adhere to the reservation and cancellation policy of that chapter.

1.5 REPORTING: Each MPI Chapter/Club shall file a copy of its financial report, as well as a copy of any mandatory governmental filings/returns with MPI Global within ninety (90) days following the close of the chapter's fiscal year. Failure to comply with this policy will result in the withholding of monthly chapter rebates until the situation is resolved.

1.6 CHAPTER/CLUB BOARDS AND COMMITTEES: Any individual assigned or elected to a Chapter/Club board or committee must be an MPI member in good standing.

SECTION 2: CHAPTERS

2.1 CHAPTER BYLAWS: All chapters' bylaws, other than MPI chapter minimum bylaws or formal documents required by any 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. All additions, deletions and changes to the minimum chapter bylaws, or formal documents required by governments other than bylaws, must be approved in advance by MPI's President/CEO or his/her designee, except for name changes or territorial boundaries which must be approved by the MPI International Board of Directors, prior to being submitted to the chapter membership for approval.

2.2 MINIMUM MEMBERSHIP: The minimum membership for chartering a new MPI chapter shall be fifty (50) members at the time of chartering, and a potential of 125 members, two-thirds of which must be in the primary location (main population source within determined boundaries) or as otherwise authorized by the MPI International Board of Directors.

2.3 START-UP FUNDS: At the time of charter approval by the MPI International Board of Directors, the chapter will be provided a start-up fund of one thousand dollars (\$1,000 USD).

2.4 CONDITIONAL CHARTER: The chapter is 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.



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2.5 CHAPTER MINIMUM STANDARDS: Requirements for maintaining charter, each chapter must meet the following criteria:

2.5.1 Submission of annual compliance requirements as defined annually by MPI Global by July 1.

2.5.2 Chapter must have their monthly financials closed no later than the 15th of each month.

2.5.3 Submission of an annual financial report and applicable tax returns (U.S. chapter only) to MPI Global no later than 90 days following the close of the chapter's fiscal year.

2.5.4 Conduct chapter board meetings on a regular basis (with minutes submitted to MPI Global).

2.5.5 Chapter board nominations and elections completed and listing of officers/directors submitted to MPI Global by March 15.

2.5.6 Compliance with MPI website/logo guidelines and brand statements.

2.6 STEPS IN EVALUATING CHAPTER STATUS: MPI chapters will be evaluated based on chapter performance standard benchmarks as defined by MPI Global annually, which include monthly retention, net membership growth, financial status, volunteer participation, leadership, governance, and legal compliance.

SECTION 3. CLUBS: MPI Clubs are created for the purpose of promoting the development of the meeting industry profession through MPI's work within the global industry. Clubs may file for chapter charter at any time, providing they meet the minimum standards outlined in the Chapter in Formation Manual. They may also opt to remain as a club if they remain under fifty (50) members but will not receive the same benefits in terms of dues rebates, programs and staff support as a chapter. A specific region can complete an application for club status through obtaining a copy of the Chapter in Formation Manual.

3.1 GOVERNING STRUCTURE: It is the expressed nature of clubs that they operate without the bylaws which govern MPI chapters. They are, however, required to meet a limited number of standards to support club activities and should become familiar with chapter operations management to graduate to chapter status following charter, if the Chapter-in-Formation process has been initiated by the Club. These standards to support the club structure are outlined in sections 3.2 – 3.4.

3.2 MINIMUM MEMBERSHIP: Minimum membership for club status shall be thirty (30) members, two-thirds of which must be in the primary location, (main population source within



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determined boundaries), or as otherwise authorized by the MPI International Board of Directors. Names of these members must be submitted at time of submission for club status to MPI Global.

3.3 STARTUP FUNDS: Clubs will be provided a start-up fund of \$ 1,000 USD per approval by the MPI International Board of Directors.

3.3.1 CLUB STANDARDS: a. Must establish a Club steering committee that should consist of local MPI members, a minimum of one-third of which should consist of meeting planners. The steering committee should meet on a quarterly basis and minutes should be taken during such meetings. Clubs may apply for chapter charter once membership is over 50 members. Information on steering committee is outlined in the Club Manual. b. Maintain Generally Accepted Accounting Procedures. c. Maintain a fiscal year budget and submit by the first day of the chapter's fiscal year to MPI Global. d. Submit a Club activity report each quarter (October 1, January 1, April 1, June 1) to the MPI Global. e. Elections/Nominations for new leaders should take place on an annual basis to ensure the continued stability of the club. Requirements for elections/nominations will be provided to the Club and results are due March 15 of each year.

3.4 MINIMUM STANDARDS FOR CLUB CHAPTER-IN-FORMATION PERFORMANCE: MPI Global should receive quarterly reports on club activities, as well as review each Club's progress through the online membership reports supplied by MPI Global. Reports should consist of meeting attendance, growth numbers, education evaluation scores, outreach program updates to recruit new members, how current members are involved in club activities, etc. 8

3.5 DEVELOPMENT STRUCTURE: MPI Clubs may apply for Chapter-In-Formation status once they have a minimum of forty-five (45) members. Clubs that have applied for chapter status (Chapters-In-Formation) will continue to receive the rebate applicable for clubs until the application has been approved by MPI International Board of Directors. A club will be given twelve months to meet all criteria for chapter status. If they do not gain chapter status in twelve months they must reapply and begin another twelve-month process. They may re-apply at any time.

3.6 STEPS IN EVALUATING CLUB CHARTER: MPI Clubs will be evaluated quarterly based on: a. Monthly retention as compared with international standards. b. Monthly membership ratio (members gained minus members lost). c. Total number of members. d. Financial status. e. Volunteer participation ratio (total members/total volunteers). f. Leadership factors; and g. Legal compliance.



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SECTION 4. For the mutual benefit and membership growth of MPI, the MPI International Board of Directors shall establish, modify, or dissolve student organizations which shall be affiliated with and recognized by an academic institution of higher learning. Each student organization, in addition, shall conduct itself in accordance with such policies as the MPI International Board of Directors may prescribe from time to time and shall, to the extent possible, be affiliated with an appropriate local MPI chapter. If no local chapter exists, MPI management shall provide for other means of integration of the student organization. Student organizations may be designated as a student club but must also show affiliation with a chapter. For example, the MPI XYZ student club of XYZ University/College affiliated with the MPI XYZ Chapter. In addition, the appropriate chapter shall designate a liaison representative from the chapter to work with the student organization.