



## **Chapter Metric Incentive Program**

### **Overview of Program**

As you plan for your upcoming term we would like to encourage you to focus on some key metrics that will help us ensure the needs of the membership are being met in a strong and consistent manner. This program is designed to help you stay focused on your key business drivers of success and sustainability. In each core area you will have the opportunity to earn points that translate into dollars to support education programs and training needs for your chapter.

The program consists of 5 goals each providing multiple levels where incentives can be achieved.

- Net Member Growth
- Volunteer Engagement
- Education Satisfaction
- Member Satisfaction
- Financial Management

### **Requirements to Participate in Chapter Metric Incentives Program**

In order for your chapter to be eligible to receive metric incentives the following requirements must be met:

- Provide a minimum of 6 education meetings (webinar, conferences, luncheon, etc.)
- In compliance for all required documents by July 1st
  - o Business plan with SMART Goals
  - o Approved budget for fiscal year
  - o 12 - 18 Month Education Calendar
  - o Marketing Plans or Calendars
  - o Taxes Filed Annually
  - o Current Bylaws & Policies
  - o Written Succession Plan

### **Awarding Incentives**

Chapters points earned will be calculated at the end of each fiscal term by your Chapter Operations Manager based on data provided in your chapter dashboard. Once dashboards are finalized in late July, your Chapter Operations Manager will provide you with a breakdown of your results, a form to select your incentives and all required deadlines for submittal.

### **What Incentives Can You Receive?**

MPI Global is committed to your success so each year we will provide a list of various incentives that support your overall chapter needs. There will be a variety of incentives from varying point values that include education dollars, website support, membership renewals, board training opportunities and more. Your Chapter Operations Manager will provide you with a current list of incentives for the fiscal year.



## **Description of Incentive Goals**

### **Net Member Growth Incentive Goal**

**Purpose** – To ensure strong retention and growth at the chapter level.

**Goal** - Chapter goals are based annually on the MPI Global overall net member growth goal. Net Member growth is calculated by adding all new members, rejoins, and reinstates from July 1, 2016 to June 30, 2017 and subtracting the cancellations processed during the same time. Growth goals will be benchmarked from the previous year's closing membership numbers provided on the membership statistics report by MPI Global.

**Net Member Growth Goal = 5%** - Chapters will earn incentives based on the following scale;

- If your chapter achieves a 5% net member growth = 1 incentive point
- If your chapter achieves a 5.5% net member growth = 2 incentive points
- If your chapter achieves a 6% net member growth = 3 incentive points

**Dashboard Tracking Process** – Chapters will not need to provide any information for this goal. Your chapter dashboard will automatically populate your membership numbers and scores for you each month.

### **Volunteer Engagement Incentive Goal**

Chapter volunteers are the lifeblood of our association. Chapters are almost solely run on volunteer support so ensuring your board engages strong, active committees is crucial to the success of your chapter.

**Purpose** – To achieve and maintain a minimum of 20% volunteer engagement.

**Goal** - Chapters who have engaged 20% or more of their members in volunteer hours will receive points based on the following percentages.

- 20 – 25% of members volunteering = 1 incentive point
- 26 -30% of members volunteering = 2 incentive points
- 31% or above = 3 incentive points

**Dashboard Tracking Process** - To be counted as a volunteer they need to be serving on an active committee and counted on the monthly committee roster. A volunteer can only be counted one time per month even if serving on multiple committees. Volunteer counts do include board members. A description of how to track your volunteers will be provided as a guide.



## Education Satisfaction Incentive Goal

**Purpose** – To gain understanding of members overall satisfaction with chapter level educational opportunities and content.

**Goal** - The education incentive goal is based on the survey data provided at the chapter level following each educational offering. Chapters will include the following question in each of their education surveys. Chapters will be measured for the purposes of metrics on the overall program satisfaction.

### All chapters must have this question in their survey for metrics

Please rate your overall satisfaction with each of the following from today's program:

- Quality of the presenter
  - Communication skill of the presenter
  - Overall Content
  - Usable take-away from this session
  - The overall program (**Enter this score into your dashboard for metrics**)
- Chapters are required to use a 5 point scale for their education surveys to report to the metric dashboard. Please use the following guidelines.

#### 5 Point Scale

- Rating for question above should reflect 1 for completely dissatisfied to 5 for completely satisfied. The use of these exact terms is required.
- Chapters will earn incentives based on the following scale:
  - 4.22 to 4.32 = 1 incentive point
  - 4.33 to 4.55 = 2 incentive points
  - 4.56 or above = 3 incentive points

**Dashboard Tracking** – To enter your survey scores into the dashboard chapters would follow these steps;

**Step 1** – Enter the total combined score for the “overall program satisfaction” question from each respondent into the dashboard.

**Step 2** – Enter the total number of respondents in the space provided.

The dashboard will automatically total your average overall program satisfaction for the month for you. The dashboard will also automatically calculate the average satisfaction for the year. Your incentive is based on the yearend average.

If you have multiple education program styles such as monthly educational luncheons designed for larger audiences and coffee talks designed for much smaller segments of membership you will need to work with your COM to determine which programs will be tracked for the metric goal and document it in the notes section of your dashboard. It is recommended to list additional program scores in the notes section to have for reference and tracking purposes. The same process would apply to multiple education programs in the



same month. If your multiple monthly programs are similar you can choose to combine both and track as overall for the month. You will need to work with your CBM on these variations to ensure tracking is clear.

## **Member Satisfaction Incentive Goal**

Ensuring our members find value in their membership is another important factor to operating the association. Understanding the needs locally and providing resources to support the overall satisfaction will ensure healthy retention.

**Purpose** – To ensure strong retention and value in membership

**Goal** - Chapter satisfaction goals will be determined through your annual Chapter Satisfaction Survey conducted by MPI Global each February. Chapters will receive their goals with their survey dashboards every year between April and May. Goals will be set based on a statistical approach to represent a significant positive change in member satisfaction. Incentives will be earned based on the following scale;

- Achieving targeted meet goal assigned on survey dashboard = 1 incentive point
- Achieving targeted exceed goal assigned on survey dashboard = 2 incentive points
- ***NOTE, chapter must achieve a minimum of 30 respondents to be eligible for the incentive. Less than 30 respondents the chapter will not receive credit for the survey data.***

**Dashboard Tracking Process** – Chapters will not need to enter any data into the dashboard for this goal. Each year MPI Global will automatically populate your survey scores once available and the points earned based on scores received.

## **Chapter Financial Incentive Goal**

Strong oversight and management of finances is crucial to any business. Your chapter will need to monitor and manage revenue over expenses and hold each department of the board accountable to the budget voted on locally. This allows the chapter to continue to enhance the value they provide to the local membership community and ensure the long term sustainability of the chapter.

**Purpose** – To ensure the chapter is earning profit for reinvestment into the membership and chapter reserves.

**Goal** - The financial incentive goal is based on gross profit. This is calculated by Total yearend revenue less total yearend expenses, divided by total yearend revenue. At the close of the fiscal year chapters can earn incentive points based on the following scale;

- 1 -5% gross profit = 1 incentive point
- 5.1 – 10% gross profit = 2 incentive points
- 10.01% or higher = 3 incentive points

**Dashboard Tracking Process** – Chapters will need to enter their monthly closing P&L revenues and expenses into their dashboards. The dashboard will automatically calculate the gross profit and incentive points for you.