

MPI Rocky Mountain Chapter

2022-2023 BUSINESS PLAN

MPI Global Vision Statement: Leading and empowering an inclusive meeting and event community to change the world.

MPI Global Mission Statement: Connect the global meeting and event community to learn, innovate, collaborate, and advocate.

MPI Global Chapter Performance Standards: Scores below are based on sustaining performance and should be considered minimum benchmarks.

1. Membership Satisfaction & Growth	2. Leadership & Engagement	3. Administration & Finance	4. Communication & Brand	5. Educational Offerings
<p>Member Satisfaction: 61 – 70%</p> <p><i>Metric Incentive begins with member satisfaction of 71%</i></p>	<p>Succession: Complete board slate due to MPI Global by March 1</p>	<p>Compliance: All documents filed with MPI Global by June 15</p>	<p>Community Presence: Maintain current info on website and at least one social media outlet (not scored)</p>	<p>Clock-hour Accredited Educational Offerings: 4 educational events.</p> <p><i>Metric Incentive begins with 4 sessions approved by EIC, ILEA, ASAE, etc.</i></p>
<p>Member Retention Without Students: 65.1 – 70%</p> <p><i>Metric Incentive begins with member satisfaction of 70.1%</i></p>	<p>Volunteer Engagement: Maintain a healthy pipeline (not scored)</p>	<p>Governance: Update chapter bylaws & policy manuals by June 15</p>	<p>Brand Compliance: Meet guidelines consistently & in timely manner (not scored)</p>	<p>Education Content Satisfaction: 4.22-4.32% survey score</p>
<p>Net Member Growth: 0.1 – 3%</p> <p><i>Metric Incentive begins with net member growth of 3.1%</i></p>	<p>Global Trainings: Participation in globally mandated programs: Online Chapter Leader Training, CAP, etc.</p>	<p>Net Profit/Fiscal Sustainability: 0.1 – 1%</p> <p><i>Metric Incentive begins with net profit of 1.1%</i></p>		
		<p>Reserves as % of Fixed Annual Operating Expenses: 25.1-75% of target</p>		

Membership:

(Note: Membership goals should be reflective of growth, retention, engagement, satisfaction, etc. Chapter Admin to provide net member growth, and member satisfaction goals below prior to dissemination)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
1. Membership Satisfaction & Growth	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Exceed MPI Global Member Satisfaction Rate of 70%	Action 1.1: Achieve 21% response rate on Member Satisfaction Survey	The how ...	Director of Member Care	Vice President of Membership	4/30/23	0%
	Action 1.2: Implement reimagined Buddy Program for new members attending Educational Programs	Connect new members with current Board members at Educational Programs	Director of Member Care	Board of Directors	9/15/23	0%
1. Membership Satisfaction & Growth	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Achieve Member Retention Without Students Rate of 70%	Action 2.1: Focus on personal outreach to members to encourage retention throughout the Year	The how ...	Director of Member Care	None	6/30/23	0%
	Action 2.2: Recognize MPIRMC members at Educational Programs	Membership team will recognize New Members, Milestone Members, Members with Industry Achievements, etc. at Educational Program by announcement and/or listed on a slide	Director of Member Care	Vice President of Membership	4/30/23	0%

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability **#5:** Reserves **#6:** Education Content Satisfaction **#7:** Clock Hour-Accredited Education

1. Membership Satisfaction & Growth	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Exceed MPI Global Net Member Growth Rate of 3%	Action 3.1: Reintroduce Backpacks to Briefcases event	Bring back Backpacks to Briefcases with the addition of "Ted Talk" style educational component	Director of Recruitment	None	5/30/23	0%
	Action 3.2: Develop a strategy to figure out why or why not they join MPI	Contact non-member attendees prior to attending 1st MPI event and after attending 2nd MPI event	Director of Recruitment	None	m/dd/yy	0%

Leadership:

(Note: Goals should be reflective of member/volunteer engagement growth, satisfaction, training and processes. Chapter Admin to provide volunteer engagement goal below prior to dissemination)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
2. Leadership & Engagement	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Global Trainings	Action 1.1: Create a Board that is well informed of their roles and responsibilities, and confident in locating the resources they need to complete the job	Create, consolidate, and clean up Board documents including Google Drive, Team Status Reports, and Job Description Flow Charts	President	None	7/31/22	0%
		Ensure Board has completed all trainings as required by Global	President	Chapter Admin	6/15/22	0%
2. Leadership & Engagement	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Succession	Action 2.1: Conduct chapter Board nominations as outlined by Global	Put out call for nominations	Immediate Past President	Chapter Admin	11/1/22	0%
		Conduct interviews	Immediate Past President	Nominations Committee	1/15/23	0%
		Compile slate	Immediate Past President	Nominations Committee	1/28/23	0%
		Submit slate to Global	Immediate Past President	Chapter Admin	3/1/23	0%
2. Leadership & Engagement	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Volunteer Engagement	Action 3.1: Maintain volunteer quota of X		Director of Leadership Development	None	6/30/23	0%

2. Leadership & Engagement	Objective 4: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Leadership Development	Action 4.1: Provide leadership skills training opportunities for Board of Directors	Conduct three leadership building activities during Board meetings or Retreats	Director of Leadership Development	None	6/30/23	0%
2. Leadership & Engagement	Objective 5: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Other	Action 5.1: Organize a DEI Committee to better represent our members and their needs	Organize DEI Committee	Immediate Past President	None	9/30/22	0%
		Host committee meetings to review membership needs and ways to implement inclusivity into the chapter	Immediate Past President	DEI Committee	6/30/23	0%
	Action 5.2: xxx	The how ...	President Elect			
	Action 5.3: Develop a Board of Directors mentorship program	Establish a mentorship program between existing/past Board members and new members to help Board be as successful as possible during their term	Director of Leadership Development	President	7/31/22	0%

Finance:

(Note: Finance goals should be reflective of profit, managing expenses, sponsorship needs, reserves etc. Chapter Admin to provide financial management goal below prior to dissemination)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
3. Administration & Finance	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Net Profit	Action 1.1: Achieve a 1.1% Net Profit	Ensure all events are profitable and re-asses those that are not	Vice President of Finance	None	6/30/23	0%
3. Administration & Finance	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Reserves at % of Fixed Annual Operating Costs	Action 2.1: Monitor chapter spending on a monthly basis as a % of Fixed Operating	Review Chapter financials monthly and discuss at Board meetings and Executive Board meetings	Vice President of Finance	None	6/30/23	0%
3. Administration & Finance (X)	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
(X)	Action 3.1: Execute 4 successful networking events	Rethink MPI After 5 so that we can make them better-attended and more profitable	Director of Special Events	None	6/30/23	0%
(X)	Action 3.2: Create sponsorship follow-up program and execute this with all 2022/2023 sponsors	Create a follow-up program for sponsors that allows them to evaluate the ROI generated from sponsorships and also gives us the opportunity to thank them and make sure we are	Director of Fundraising	None	6/30/23	0%

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability **#5:** Reserves **#6:** Education Content Satisfaction **#7:** Clock Hour-Accredited Education

		following through with fulfillment				
(X)	Create a plan for "MPI Rocky Mountain Fams" and execute 1 pilot Fam	Come up with plan for what this program will look like, work with CVBs and other vendors to gauge interest and generate buy-in, plan and execute 1 pilot Fam and then assess success to see if we would like to continue this program moving forward	Director of Fundraising	None	5/1/23	0%
(X)	Produce 3 successful fundraising events	Plan and execute Casino Night, Golf Tournament, and Gala	Director of Special Events	None	6/20/23	0%

Marketing & Communication:

(Note: Marketing & Communication goals should be reflective of growth opportunities in marketing the chapter, reach of membership, development of new outreach initiatives, etc.)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
4. Communication & Brand (X)	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
(X)	Action 1.1: xxx	The how ...				
(X)	Action 1.2: xxx	The how ...				
4. Communication & Brand (X)	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
(X)	Action 2.1: xxx	The how ...				
(X)	Action 2.2: xxx	The how ...				
4. Communication & Brand (X)	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
(X)	Action 3.1: xxx	The how ...				
(X)	Action 3.2: xxx	The how ...				

Education:

(Note: Education goals should be reflective of driving attendance, clock hours, meeting member’s content needs, etc. Not a list of chapter events - Chapter Admin to provide Education Satisfaction goal below prior to dissemination)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
5. Educational Offerings	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Clock-hour Accredited Educational Offerings	Action 1.1: xxx	The how ...				
5. Educational Offerings	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Education Content Satisfaction	Action 2.1: Determine the feasibility of transitioning to quarterly educational opportunities rather than the current model.	Review MPI requirements as well as Board and attendee preferences through surveying prior attendees.	Vice President of Education	Director of Education	9/30/22	0%
		Review number of next cycle events, formats of those events, and attendee number goal.	Vice President of Education	Director of Education	9/30/22	0%
	Action 2.2: Identify potential future education topics.	Conduct a thorough review of the past 5 years of Chapter education, events, topics, and survey results. Do a similar study with similar industry organizations. Review and create an attendee list (including those granting	Vice President of Education	Director of Education	10/30/22	0%

		permission for attendance) and survey that list for desired topics/needs.				
5. Educational Offerings	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
Other	Action 3.1: Create a 10 person Education Advisory Committee	Identify consistent attendees and/or decision makers to create a small advisory committee/marketing group.	Director of Education	Vice President of Education	10/30/22	0%

Other (As need per chapter):

(Note: This page is meant for your board of directors to customize. Customize it to accommodate objectives or actions related to additional departments or committees not captured above: e.g., Special Events, Leadership Development, Inclusion, Community Engagement / Meet-Up's, etc.)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
	Objective 1: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
	Action 1.1: xxx	The how ...				
	Action 1.2: xxx	The how ...				
	Objective 2: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
	Action 2.1: xxx	The how ...				
	Action 2.2: xxx	The how ...				
	Objective 3: xxx	The what ...	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	
	Action 3.1: xxx	The how ...				
	Action 3.2: xxx	The how ...				