

## 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.

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

**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

## 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 & Metric	Objectives/ Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
<b>Member Satisfaction &amp; Growth (1)</b>	<b>Objective 1: Achieve member satisfaction score of 70% or better on chapter needs assessment survey</b>	<b>Use this survey as a gauge to member satisfaction at the chapter level</b>	<b>VP, Membership</b>	<b>Director, Member Care; Director, Communications; Office</b>	<b>4/30/23</b>	
Member Satisfaction & Growth (1)	<b>Action 1.1:</b> Develop questions for survey that will allow for percentage in objective to be realized.	Use the 2022 survey and add a question on a scale of 1-5 about member's overall satisfaction with chapter	Director, Member Care	Director, Communications; Office	3/15/23	
Member Satisfaction & Growth (1)	<b>Action 1.2:</b> Achieve 21% response rate on Chapter Needs Assessment Survey	Engage more members so that we are making decisions based on valid data	Director, Member Care	President Elect, Director, Communications; Office	4/30/23	
Member Satisfaction & Growth (1)	<b>Action 1.3:</b> Implement reimagined Buddy Program for new members attending Educational Programs	Connect new members with current board members at Educational Programs	Director, Member Care	Entire Board, Office	9/15/22	
<b>Member Satisfaction &amp; Growth (2)</b>	<b>Objective 2: Achieve Member Retention Without Students Rate of 70%</b>	<b>Ensure actions are taken to retain members</b>	<b>VP, Membership</b>	<b>Director, Member Care; Retention Committee</b>	<b>6/30/23</b>	
Member Satisfaction & Growth (2)	<b>Action 2.1:</b> Develop and implement an ongoing outreach program to encourage member retention and engagement	Contacting members to get updated information. Contacting members	Director, Member Care	Retention Committee	9/30/22	

**Metric Incentives:** #1: Membership Satisfaction #2: Member Retention without Students #3: Net Member Growth #4: Net Profit/Fiscal Sustainability  
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		to celebrate anniversary				
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#### Membership (continued):

Performance Standard & Metric	Objectives/ Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Member Satisfaction & Growth (3)	<b>Objective 3: Exceed MPI Global Net Member Growth rate of 3%</b>	<b>Regrow the membership</b>	VP, Membership	Director, Recruitment; Director, Communications; Office	6/30/23	
Member Satisfaction & Growth (3)	<b>Action 3.1:</b> Launch a student transition event to all students in hospitality focused programs in senior levels	Ensure that we are helping to transition students from academics to the workforce	Director, Recruitment	Director, Communications; Office	4/30/23	
Member Satisfaction & Growth (3)	<b>Action 3.2:</b> Develop an outreach strategy for contacting non-members after they have attended their 2 guest events	Contact non-members prior to attending first MPI event, after attending first MPI event and after attending 2 <sup>nd</sup> MPI event	Director, Recruitment	Director, Communications; Office	8/30/22	
Member Satisfaction & Growth (1)	<b>Objective 4: Execute a minimum of 3 membership recognition opportunities annually</b>	<b>Recognizing members leads to more satisfied members</b>	VP, Membership	Director Member Care; Director, Retention; Director Leadership Development; Director, Special Events; Director, Communications; Office	6/30/23	
Member Satisfaction & Growth (1)	<b>Action 4.1:</b> Execute member awards at annual chapter gala	To highlight members who have gone above and beyond to elevate MPIRMC	Director, Member Care	Director, Retention; Director Leadership Development; Director, Special Events; Director, Communications; Office	6/30/23	

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## Membership (continued):

Performance Standard & Metric	Objectives/ Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Member Satisfaction & Growth (1)	<b>Action 4.2:</b> Execute a minimum of five (5) member spotlights annually	Use chapter communication outlets to spotlight members	Director, Member Care	Director, Communications; Office	6/30/23	
Member Satisfaction & Growth (1)	<b>Action 4.3:</b> Recognize members at a minimum of six (6 O) Education 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, Member Care	Director, Education; Office	4/30/23	

## Leadership (Office of the President & Leadership Development):

(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
Leadership & Engagement (1)	<b>Objective 1:</b> Ensure all chapter leaders are well trained on their positions and are familiar with all chapter leader resources	Create a Board that is well informed of their roles and responsibilities, and confident in locating the resources they need to complete the job	President	Office of the President; Entire Board; Office; COM	8/31/22	
Leadership & Engagement (1)	<b>Action 1.1:</b> Execute a review and modification of all chapter leader documents as needed	Create, consolidate, and clean up Board documents including Google Drive, Team Status Reports, and Job Description Flow Charts	President	Office of the President; Entire Board; Office; COM	8/31/22	
Leadership & Engagement (1)	<b>Action 1.2:</b> Ensure Board has completed all trainings as required by Global	Follow up with each board member to ensure they have completed the trainings	President	Office of the President; Entire Board; Office; COM	8/31/22	
Leadership & Engagement (1)	<b>Objective 2:</b> Ensure successful implementation of chapter nominations process as outlines in the minimum chapter bylaws	Executing a process to ensure that effective succession planning is in place to ensure the right people are placed in the right positions	Immediate Past President	Nominations Committee; Office of the President; Director, Leadership Development; Office	3/1/23	
Leadership & Engagement (1)	<b>Action 2.1:</b> Distribute call for nominations	Communicate to the membership of board service opportunities	Immediate Past President	Nominations Committee; Office	11/1/22	

## Leadership (Office of the President & Leadership Development) (continued):

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Leadership & Engagement (1)	<b>Action 2.2:</b> Conduct board candidate interviews	Provide interviews of each candidate to ensure the right selections are being made	Immediate Past President	Nominations Committee	1/15/23	
Leadership & Engagement (1)	<b>Action 2.3:</b> Finalize board slate	Meet with Nominations Committee to pull together final choices for board slate and approve	Immediate Past President	Nominations Committee	1/28/23	
Leadership & Engagement (1)	<b>Action 2.4:</b> Submit final approved slate to Global	Share final slate with Executive Director so it can be submitted to MPI global	Immediate Past President	Office	3/1/23	
<b>Leadership &amp; Engagement (1)</b>	<b>Objective 3: Ensure a volunteer engagement percentage of 17% of total membership</b>	<b>Volunteer engagement will help support member retention and satisfaction efforts</b>	<b>President Elect</b>	<b>Director, Leadership Development</b>	<b>6/30/23</b>	
Leadership & Engagement (1)	<b>Action 3.1:</b> Conduct a minimum of three (3) leadership skills activities	Provide leadership skills training opportunities for Board of Directors during Board meetings or Retreats	Director, Leadership Development	OOP; Office	6/30/23	
Leadership & Engagement (1)	<b>Action 3.2:</b> Develop a Board of Directors mentor 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, Leadership Development	OOP; Office	7/31/22	

**Leadership (Office of the President & Leadership Development)** (continued):

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Leadership & Engagement (1)	<b>Objective 4:</b> Create chapter Diversity, Equity & Inclusion Committee	To better represent our members and their needs	Immediate Past President	OOP; Director, Leadership Development; Director, Communications; Office	9/30/22	
Leadership & Engagement (1)	<b>Action 4.1:</b> Chair recurring DEI committee meetings to develop chapter DEI policies & procedures	To review membership needs and ways to implement inclusivity into the chapter	Immediate Past President	DEI Committee	6/30/23	



## 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
Administration & Finance (4)	Objective 1: Achieve a 1.1% Net Profit	Ensure all events are profitable and re-assess those that are not	VP, Finance	Director, Special Events; Director, Fundraising; Director, Communications; Office	6/30/23	
Administration & Finance (4)	Action 1.1: Execute 4 profitable Networking events	Rethink MPI After 5 so that we can increase attendance and ensure they are more profitable	Director, Special Events	Director, Fundraising; Director, Communications; Office	6/30/23	
Administration & Finance (4)	Action 1.2: Produce 3 successful fundraising events	Plan and execute Casino Night, Golf Tournament, and Gala	Director, Special Events	Director, Fundraising; Director, Communications; Office	6/20/23	
Administration & Finance (4)	Action 1.3: Create sponsorship follow-up program and execute this will 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 following through with fulfillment	Director, Fundraising	Director, Special Events; Director, Communications; Office	6/30/23	

## Finance (continued):

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Administration & Finance (4)	<b>Action 1.4:</b> 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, Fundraising	Director, Special Events; Director, Communications; Office	5/1/23	
Administration & Finance (5)	<b>Objective 2: Maintain reserves at 51%-100% of annual operating expenses</b>	<b>Maintain reserves without having to use the investment funds to provide enough funds for the following fiscal year</b>	VP, Finance	President; Office	6/30/23	
	<b>Action 2.1:</b> Review and report reserves to board of directors at all board meetings	Making the board aware of reserve totals is vital so we can plan to begin adding back to reserves	VP, Finance	President; Office	6/30/23	

## 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
Leadership & Engagement (1)	Objective 1: Create a Community Service (CSR) Infrastructure Program	Ensure opportunities are available for members to participate in giving back opportunities	VP, Communications	Director, Communications, Director, Leadership Development, Director, Member Care, Office	9/30/22	
Leadership & Engagement (1)	Action 1.1: Recruit a Community Service Chair	Ensure there is a committee chair in place to execute chapter CS initiatives	Director, Communications	Director, Leadership Development	7/15/22	
Communications & Brand (1)	Objective 2: Increase digital engagement of chapter membership by 5%		VP, Communications	Director, Communications, Social Media Committee	6/30/23	
Communications & Brand (1)	Action 2.1: Increase Social Media traffic by 5%	Set expectation with Social Media Chair to have planned posts on calendar at least 30 days in advance	Director, Communications	Social Media Committee	6/30/23	
Administration & Finance (4)	Action 2.2: Promote Social Media Buyouts Quarterly	Use buyouts to increase awareness of MPIRMC and to generate revenue stream	Director, Communications	Social Media Committee	6/30/23	
Communications & Brand (1)	Objective 3: Increase overall Member Minute engagement by members	Create new aspects of MM to encourage greater engagement	VP, Communications	Director, Communications; Social Media Committee	6/30/23	
Communications & Brand (1)	Action 3.1: Increase the Amount of Click Throughs on Member Minute Increase by 5% over previous year	1. Develop a prize drawing each month for those members who clicked through. 2. Randomly place an Easter egg in MM which encourages a response. Publish MM twice per month or	Director, Communications	Social Media Committee	6/30/23	

**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

		more often when it is required				
Communications & Brand (1)	<b>Action 3.2:</b> Action 4.2: Execute a minimum of four Quarterly President's Messages in the Member Minute Quarterly	Work with President to develop timely quarterly messages to Membership	Director, Communications	President; Social Media Committee	6/30/23	
Communications & Brand (1)	Action 3.3 Improve Structural Organization within Communications to successful execution of the basic requirements of our Committee	Schedule Quarterly meetings/reviews with each Committee Chair with Director and VP to increase over effectiveness for Communications	Director of Communication	VP Communications	6/30/2023	

## 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
Educational Offerings (7)	<b>Objective 1:</b> Execute five (5) education events three (3) of which must be accredited	Member satisfaction through elevated educational offerings	VP, Education	Director, Education; Education Committee; Office	6/30/23	
Educational Offerings (6)	<b>Action 1.1:</b> Determine 5 (high performing) education event dates, times, formats, and tentative locations.	Working with other positions to ensure effective decisions are made on these items	Director, Education	OOP; Director, Special Events; Director, Fundraising	9/30/22	
Educational Offerings (6)	<b>Objective 2:</b> Achieve a 4.33% minimum satisfaction survey result for all education events	4.33% was chosen as the goal because it will put the chapter in the high performing category	VP, Education	OOP; Director Leadership Development; Director, Education; Education Committee; Office	6/30/23	
Educational Offerings (6)	<b>Action 2.1:</b> Create a list of #10 potential education topics that will then be reduced to #5 topics	Review 5 years of chapter data to identify potential topics based on attendance and survey results. Reach-out to other regional MPI chapters and other industry organizations for similar data, review, and integrate with our chapter data. Complete a targeted survey to membership seeking suggested topics. Review identified topics to ensure compliance with EIC requirements	Director, Education	OOP	9/30/22	
Educational Offerings (6)	<b>Action 2.2:</b> Create a 10-person education advisory committee	Work with Leadership development to develop structure and expectations for the committee. Review chapter membership to	Director, Education	Director, Leadership Development	8/31/22	

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		identify potential committee members. Recruit and onboard committee members				
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**Education** (continued):

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Educational Offerings (6)	<b>Action 2.3:</b> Revise and launch survey program at every education event	Provide paper at each event that is to be completed following each event. Explore digital solutions for onsite surveys. Expand survey to question why they entered scores and desired future topics	Director, Education	Office	8/31/22	
Educational Offerings (6)	<b>Action 2.4:</b> Secure a minimum of one (1) new partner relationship for education	Survey future events and speakers coming to the area to identify potential speakers and partnership opportunities.	Director, Education	Director, Fundraising; Office	6/30/23	