

2021 -2022 BUSINESS PLAN

MPI Global Vision Statement: Leading and empowering the 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.

Chapter Performance Standards: Scores below are based on sustaining performance and should be considered minimum benchmarks. For a glossary of terms and instructions on using this business plan, refer to the guide on p. 8-9.

Membership Satisfaction & Growth	Leadership & Engagement	Administration & Finance	Communication & Brand	Educational Offerings
Member Satisfaction: 60.1-70% <i>Metric Incentive begins with member satisfaction of 70.1%</i>	Succession: Complete board slate due to MPI Global by March 1st	Compliance: All documents reviewed by June 15th . File with MPI Global by July 1st	Community Presence: Maintain current info on website and at least one social media outlet	Clock-hour Accredited Educational Offerings: 4 educational events. <i>Metric Incentive begins with 4 sessions approved by EIC, ILEA, ASAE, etc.</i>
Member Retention Without Students: 68.1-70% <i>Metric Incentive begins with member satisfaction of 70.1 - 75%</i>	Volunteer Engagement: 8.1-13%	Governance: Update chapter bylaws & policy manuals by July 1st	Brand Compliance: Meet guidelines consistently & in timely manner	Content Satisfaction: 4.22-4.32% survey score
Net Member Growth: 0 - 2.5% <i>Metric Incentive begins with net member growth of 2.51%</i>	Global Trainings: Participation in globally mandated programs: Online Chapter Leader Training, CAP, etc.	Net Profit/Fiscal Sustainability: 0 - 1% <i>Metric Incentive begins with net profit of 1.1%</i>		
Non-Member Conversion Rate: 2.1-10%		Reserves as % of Fixed Annual Operating Expenses: 25.1-75% of target		

Metric Incentives: #1: Membership Satisfaction #2: Net Member Growth #3: Net Profit/Fiscal Sustainability #4: Clock Hour-Accredited Education #5: Volunteer Engagement

Membership:

(Note: Membership goals should be reflective of growth, retention, conversion, engagement, satisfaction, etc. Chapter Admin to provide net member growth, member satisfaction and conversion 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
Net Member Growth	Objective 1: Produce engaging events to promote the membership including Nothing But Networking and MPI & Me sessions	Providing different opportunities for members and potential members to engage	VP and Director of Membership	Education Team, Recruitment and Retention Committees	6/30/22	Providing different opportunities for members and potential members to engage
1	Action: Produce a minimum of two and maximum of five NBN events and work with Education to secure space to run MPI & Me prior to Education Events	Providing different opportunities for members and potential members to engage	VP and Director of Membership	Education Team, Recruitment, Marketing and Retention Committees	6/30/22	Produce a minimum of two and maximum of five NBN events and work with Education to secure space to run MPI & Me prior to Education Events
Retention	Objective 2: Ensure a minimum of 69% retention rate	Regrow the membership	VP and Director of Membership	Retention Committee	6/30/2022	
1	Action: Research and implement a plan for retaining members	Personally reaching out to members to get feedback and encourage them to engage the chapter/re-up their membership	VP and Director of Membership	Retention Committee	6/30/22	Research and implement a plan for retaining members

2	Action: Develop and implement strategic onboarding for new members to ensure smooth and engaging introduction to the chapter	Directing new members to MPI & Me and encourage them to sign up as volunteers	VP and Director of Membership	Retention Committee	6/30/22	Develop and implement strategic onboarding for new members to ensure smooth and engaging introduction to the chapter
3	Action: Engage with new student members	Flag new students and direct them to the Emerging Professionals Committee	VP and Director of Membership	Retention and Emerging Professionals Committee	6/30/22	Engage with new student members
Non-Member Conversion Rate	Objective 3: Convert non-members in to members by 5-10%	Have conversations with nonmembers to the benefit of joining MPI – e.g., have a membership table at Job Fair	VP and Director of Membership	Recruitment Committee	6/30/22	
1	Follow up with all non-members that attended an education and/or networking event	Personally reaching out to each attendee and ask them how their experience was and explain the benefits of joining MPI	VP and Director of Membership	Recruitment Committee	6/30/22	Follow up with all non-members that attended an education and/or networking event
2	Reaching out to diverse markets and businesses to increase membership	Evaluate large companies that are missing from our membership and reach out to let them know about the benefits of	VP and Director of Membership	Recruitment Committee	6/30/22	Reaching out to diverse markets and businesses to increase membership

		being a member of MPI				
Net Member Growth	Objective 3: Ensure a minimum of 2.51% net member growth	Continue to grow our chapter membership	VP and Director of Membership	Recruitment and Retention	6/30/22	
1	Action: Launch a minimum of one and a maximum of four Emerging Professionals meet ups	Identify and engage emerging professionals (one to three years in the industry) to attend EP meet ups to network with industry peers and chapter leadership	VP and Director of Membership	Emerging Professionals and Marketing Committees (using social media to announce and coordinate)	6/30/22	

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
#4- Clock Hour-Accredited Education	Objective 1: To be a leader in diverse educational offerings that incorporate various learning preferences by planning and executing (1) virtual program and (5) in-person programs (ACE Education accounting for 2 of the 5) achieving a 4.22-4.32% survey score, with the goal of each program being approved for CEUs	Designing impactful education which offered through diverse formats to make education as accessible as possible to the membership-at-large	VP, Education	Director of Education, Programs Committee	6/30/2022	
1	Action: Survey Membership six times throughout the year for topics reflecting the	Add post-event surveys to crowd-source topics at point of registration, via social media and	VP, Education	Director of Education, Programs and Communications Committees	6/30/2022	

	needs and interests of the membership	after each education and networking event				
2	Action: Determine and execute relevant programming to ensure preferred learning formats including in-person, virtual and podcast offerings based	Setting the program calendar with input and collaboration with the DEI committee with a focus on sustainability and safety	VP, Education	Director of Education, Programs, ACE Content & Programming, ACE Experiences & Logistics and DEI Committees	6/30/2022	
3	Action: Develop Revenue Generation Strategy for six educational offerings	Determine pricing for virtual events, podcasts and in-person events that incorporates sponsorship opportunities	VP, Education	Director of Education, Director of Partnerships, VP of Finance, Programs and Partnerships Committees	7/31/2021	
4	Action: Determine and Secure Production Support for Podcasts	Determine Cost for production and distribution of podcasts and present to board for review and approval	VP, Education	Director of Education, VP of Finance, Director of Partnerships, Programs and Partnerships Committees	7/31/2021	
#4- Clock Hour-Accredited Education	Objective 2: Plan and execute 2 CMP Preparation offerings	To provide an in-depth review of the study material for the CMP test and provide	VP, Education	Director of Education and CMPU Committee	6/30/2021	

		revenue for the chapter.				
1	Action: Deliver a live CMP University to provide an ongoing source of funds for the chapter	Deliver an in person offering in the January – May time frame to be held every other Saturday	VP, Education	Director of Education, VP of Finance, Director of Partnerships, CMPU and Partnerships Committees	6/30/2021	
2	Action: Deliver a virtual, self-paced, on demand digital CMP offering to provide additional revenue funds for the chapter	Manage the digital CMP course developed in 2020 to be housed on Teachable and made available to MPI members nationally and internationally, as well as non-members worldwide	VP, Education	Director of Education and CMPU Committee	7/31/2021	
#4 Clock Hour-Accredited Education	Objective 3: Plan and execute (6) – (12) educational sessions for ACE (number of sessions dependent on re-imagined ACE format) with all sessions being eligible for CEU credits	Design educational offerings for ACE which appeal to supplier and planner interests incorporating DEI and Sustainability prism to educational offerings	VP, Education	Director of Education VP and Director of ACE DEI Committee Partnerships Committee Volunteer Committee	3/31/2022	Objective 3: Plan and execute (6) – (12) educational sessions for ACE (number of sessions dependent on re-imagined ACE format) with all sessions being eligible for CEU credits

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
#1 Membership Satisfaction	Objective 1: Maintain one voice in all MPINCC communications.	Train all volunteers to ensure unified language in all chapter communications.	VP Communications	BOD, The office	6/30/2022	
1	Action: Post an average of 3 MPINCC authored social media posts per FB, IG, LinkedIn & Twitter per week to promote the chapter activities and engage members and potential members	Utilize (4) social media outlets to engage and track impact campaigns	VP Communications	Director of Marketing, Marketing, Communications, Education, ACE, OTP, Membership, Partnerships & Leadership Development Committees	6/30/2022	
2	Action: Produce Keynote – 12 issues per year & special editions as needed to showcase and promote the chapter	Collect content from each dept as needed. Also highlight member's professional changes & job	VP Communications	Director of Marketing, Marketing, Communications, Education, ACE, OTP, Membership, Partnerships & Leadership	6/30/2022	

		opportunities in the industry.		Development Committees		
3	Action: Review all chapter communications with the office, including emails, CVENT reg, etc. to drive & collect data for creating a benchmark for marketing ROI	Provide feedback of all chapter communications based on guideline documents	VP Communications	BOD, The office	6/30/2022	
#1 Member Satisfaction	Objective 2: Maintain Global & Chapter communication guidelines toolkit & resources for the chapter.	Share the global & chapter communication guidelines of global/ chapter to all volunteers	VP Communications	BOD, The office	6/30/2022	
1	Action: Share the Chapter Social Media Style Guide to all volunteers	Share the Social Media Playbook	VP Communications	Director of Marketing, Communications & Marketing Committees	6/30/2022	
2	Action: Share & train volunteers on Global & Chapter Style guides so all on the same page as they draft chapter communications	Distribute Global & Chapter Communication Style Guide to all volunteers	VP Communications	BOD, the office	6/30/2022	

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 Net Profit/Fiscal Sustainability	Objective 1: To continue to maintain a fiscally strong and sustainable chapter by achieving a net Profit of 1.1-1.5%	Creating unique offerings for revenue through education, partnerships, special events and membership	VP Finance	Director of Partnership, Director of Special Events, VP of Membership, VP of Education, VP ACE, OTP	6/30/22	
1	Action: To drive revenue and recruit and retain members, by creating and executing two Special Events, including a culinary event (Corks and Forks), and Gala. Explore the possibility of an outdoor sport tournament (golf, tennis, pickle ball or bocce ball).	Form committees for 2 existing events, and explore the idea of creating a fall "sport" tournament with partnership opportunities.	VP Finance	Director of Special Events, Corks & Forks Committee, Gala Committee, Programs Committee, Partnerships, Marketing	6/30/22	
	Participate with GMID event as a lead partner.	Assign a GMID liaison, who will work with other organizations to create a local GMID event.				

Metric Incentives: #1: Membership Satisfaction #2: Net Member Growth #3: Net Profit/Fiscal Sustainability #4: Clock Hour-Accredited Education #5: Volunteer Engagement

#3 Net Profit/Fiscal Sustainability	Objective 2: To continue to maintain reserves at 51% to 100% of annual operating expense to ensure the future sustainability of the chapter	During the fallout of COVID-19, the chapter will utilize 50% of the reserves, leaving enough for the following program year if need be	VP Finance	Board of Directors	6/30/22	
#3 Net Profit/Fiscal Sustainability	Objective 3: Achieve partnership & fundraising goals of \$45,000 in cash and \$50,000 in in-kind donations.	Educate new partners on value proposition and maintain existing partner relationships. Explore and create alternative sponsor packages	VP Finance	Director of Partnerships, Partnerships Committee	6/30/22	
1	Action: Maintain existing partners and obtaining new partners as chapter sponsors, by demonstrating the value of a long-term partnership agreement.	Have committee members focused on chapter sponsorships – year-round or longer term. Start earlier for sponsorship requests as organizations are setting budgets earlier than our chapter calendar year.	VP Finance	Director of Partnerships, Partnerships Committee, OTP	6/30/22	
2	Action: Create a new partnership prospectus, to entice event sponsors	Finalize new prospectus and focus on past event	VP Finance	Director of Partnerships, Partnerships	6/30/22	

	to upgrade to chapter sponsors. Sponsors will have the opportunity to sponsor a "signature event", along with the chapter sponsor benefits..	sponsors to engage them early to become chapter sponsors.		Committee, Director of Special Events, VP of ACE, OTP		
3	Action: Identify, create & pursue a new diverse and non-traditional list of target partners for potential partnerships.	Research and reach out to potential partners including international DMCs, retail prospects, event tech, virtual meeting, and client gifting companies	VP Finance	Director of Partnerships, Partnerships Committee, all board (recommendations)	6/30/22	

Leadership: 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
#5 Volunteer Engagement	Develop quality volunteers and future leaders with succession planning and leadership development experiences for members in support of 9% of total membership as volunteers	Support our volunteers and cultivate our chapter leaders with development opportunities.	VP Volunteer Development	Director Leadership Development, Volunteer Development Committee, All VPs & Directors	6-30-22	
	Action: Quarterly virtual round table focused on individual leadership development for chairs and co-chairs					
	Action: Produce Virtual Annual Chair/Co-Chair Training (on-boarding)					
	Action: Maintain program through the volunteer development committee to retain and grow member volunteers					
#5 Volunteer Engagement	Create a culture of inclusion where we consistently apply the	Inspire and showcase the culture of inclusion	VP Volunteer Development	Director Leadership Development	6-30-22	

	DE&I lens on all chapter initiatives & programs, audited quarterly.	at the core of our chapter.		All VPs & Directors, DEI Committee		
	<p>Action: Create and implement chapter diversity transparency dashboard to establish baseline for future measurement.</p> <ul style="list-style-type: none"> - Representation of Speakers - RFP Practices - Chapter Communications - Leadership Representation - Task force, special committee and awards team representation - Honoree representation <p>Update on a quarterly basis. Consider publication in The Key Note.</p>					
	Action: Introduce a DE&I training module for Chair/Co-Chair Training					
	Action: Review and update CPGs & LPGs to include DE&I focused language in leadership					

	and committee roles and tasks					
#5 Volunteer Engagement	Develop a strategy for the chapter annual transition plan that creates greater ramp-up time for committees to be built prior to the program year.	Improve the annual transition process to set leadership up for success.	VP Volunteer Development	Director Leadership Development, Office of the President	12-01-21	

Leadership: Office of the President (OTP)

(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
#5 Volunteer Engagement	Create a nominations committee that reflects the diversity of the membership with a minimum of 6 members to help recruit a diverse pool of candidates to ensure all stakeholders are represented on the board of directors	Ensure the chapter represents member demographics and voices to secure future growth and sustainability	IPP	President, Incoming President, VP of Leadership Development, VP of Membership, Director of Leadership Development, Director of Membership, Nominations Committee, I&D Committee	2/28/2022	
#5 Volunteer Engagement	Represent the chapter with the MPI WEC Organizing Committee and execute a plan for assistance	Provide the chapter with an outline of roles and responsibilities to support the event	IPP	Office, President, Incoming President, Volunteer Development	6/9/2022	
#1 Membership Satisfaction	Facilitate and execute a quarterly (4 times) connection	Determine and organize opportunities to engage MPINCC Past Presidents with the chapter	IPP	President, IPP, Office	6/30/2022	

Metric Incentives: #1: Membership Satisfaction **#2:** Net Member Growth **#3:** Net Profit/Fiscal Sustainability
#4: Clock Hour-Accredited Education **#5:** Volunteer Engagement

	with MPINCC Past Presidents					
#1 Membership Satisfaction	Serve as the liaison to the MPI Foundation and determine a minimum of one (1) initiative/opportunity to support the Foundation.	Review all chapter events/initiatives to determine an opportunity to support the MPI Foundation	President	All Board of Directors	12/31/2021	
#5 Volunteer Engagement	Implement a new document sharing platform to house Chapter Leader resources	Work with association management to track and organize key documents to enable a smoother board turnover.	President	All Board of Directors	1/31/2022	
#3: Net Profit/Fiscal Sustainability	Implement a minimum of one taskforce to review and strategize for the future needs and sustainability of the chapter	Utilize volunteers to explore and improve long-term strategies to sustain the viability of the chapter which may include a revenue strategy, ACE, and/or new signature event taskforce.	PE	President, Immediate Past President, Selection of Volunteers	12/31/2021	
#3: Net Profit/Fiscal Sustainability	Complete review and update to ensure all governance documents are	Review by-laws, policies and procedures, CPGs and LPGs to review and update	PE	All Board of Directors	6/30/2022	

	updated and in compliance					
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Annual Conference & Expo:

(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-Ups, etc.)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
#3 Net Profit/Fiscal Sustainability	Objective 1 - Produce 1-2 premier annual events to raise chapter awareness, through a strong education slate, networking, and unique sales opportunities for planners and suppliers.	Provide a successful conference and showcase to our members and non-members best in class education that earns CEU credits, multiple networking opportunities, and awareness and brand of the MPINCC chapter	VP ACE	Entire Board of Directors (except Director of Special Events) all committees, (except specific special events committees)	6/30/22	
1	Action - Create a procedural document for attendees, staff and vendors, to ensure a safe and healthy environment, including any social distancing guidelines, as well as	Develop a safety guide that is up-to-date with the industry standards and is incorporated in the Emergency plan, retitled The Emergency and Safety Plan	VP ACE	Director of ACE, ACE Experiences & Logistics Committee	12/31/2021	

	any county guidelines					
2	Action - Work with the I&D Committee to develop an action plan that highlights strategic initiatives for creating inclusive event design and a respectful environment	Incorporate I&D elements following the MPI Global guidance once developed. Some topics could include: working with presenters on diverse panels, providing different learning styles, inclusive food and beverage options with labels, nursing mother room, and create opportunities to educate our attendees about our I&D mission	VP of ACE	Director of ACE, VP & Director of Leadership Development, ACE Experiences & Logistics Committee, ACE Content & Programming, I&D Committee,	12/31/2021	
3	Action - Investigate and incorporate virtual elements for ACE 2022, including streaming of content and virtual showcase	Research possible virtual platforms to provide an opportunity for all attendees to participate live or virtual. Work closely with Partnership Committee to find an in-kind technology partner for these events	VP ACE	Director of ACE, VP & Director of Education, VP of Finance, Director of Partnerships, ACE Experiences & Logistics Committee, ACE Content & Programming		

#3 Net Profit/Fiscal Sustainability	Objective 2 – Continue to support the financial health of the chapter through our largest chapter event(s) with a goal of \$40,000 in net revenue and 40% planner attendees	Shift focus to increase attendee registration that is more balanced between planners and suppliers, providing a stronger revenue source for the chapter that is not solely dependent on exhibitors	VP ACE	Director ACE, VP Finance, VP Marketing, OTP	6/30/2022	
1	Action - Create a new pricing structure by revisiting existing pricing model and explore ideas for improving planner/supplier ratio	The new pricing structure would include independent planners, non-exhibiting suppliers, trade show-only pricing as well as registration incentives for both planners and suppliers.	VP of ACE	Director of ACE, VP Finance and OTP	12/31/2021	

HOW TO USE THIS BUSINESS PLAN

Key Points

- Work with your facilitator and board members to create this plan. Depending on your retreat agenda plan and facilitator's preference, you might be asked to work with your board to create the plan in advance of or onsite at the retreat.
- Each section of the business plan aligns with one of your key board members in addition to the five core areas of performance standards by which your chapter is measured:
 - Membership = VP of Membership
 - Education = VP of Education
 - Marketing & Communications = VP of Communications
 - Finance = VP of Finance
 - Leadership = Office of the President
 - Other = Additional or supporting departments, committees and special projects
- This business plan is a living, breathing document that should be constantly updated. At every board meeting, conduct a quick review of the stage of completion for each goal. Mid-year retreats are a great opportunity to revisit and update this plan so that you can finish the year strong.

Glossary

Performance Standards – Metrically aligned measurements for chapter success that derive from mandates outlined in MPI's Global Bylaws and Policy Guide and incorporate other operational best practices; chapters that do not meet mandated minimum standards might be at risk of losing their chapter charter

Metric Incentives – Five statistical goals tied to high-performing chapter standards, which might qualify chapters to receive incentives and recognition at the annual chapter performance awards.

Metric # - The number that corresponds to each Metric Incentive.

Objectives/Actions – Steps your chapter will take to achieve minimum performance standards or metric incentives for high-performing chapters

- Objectives – SMART Goals (specific, measurable, achievable, relevant, timely). They should tie directly to the mission, vision, performance standards and/or metrics. As a chapter, we need to align with the overall direction of the global organization. (see an example below)
- Action – The volunteer/committee work needed to achieve the objectives (see example below)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Non-Student New Member Growth	Objective 1 Achieve 5% Net Member Growth	Recruit XX Members by end of term through targeted Membership programs and initiatives	VP Membership	Director of Member Care, Director of Member Recruitment	6/30/2020	0%
1	Action: Develop and Activate Member Recruitment Committee with a total of (3) volunteers	<ul style="list-style-type: none"> • Conduct (1) annual Member Recruitment Drive beginning Aug. 1 		Director of Member Recruitment	May 24	0%
2	Action: Develop and Activate Member Care Committee with a total of (3) volunteers	<ul style="list-style-type: none"> • Conduct (4) Master Your Membership & Networking Events 		Director of Member Care	July 15 Oct. 23 Jan. 22 April 17	0%
3	Action: Partner with Special Events on Volunteer Recognition Event In May prior to Gala	<ul style="list-style-type: none"> • Produce Member VIP Recognition Event and award (4) chapter membership renewals • Award member recruitment prize 		Director of Member Care	May 24	0%

Owner – The main point person to manage the objectives/actions. Should be a position and not a name.

Collaborations – Other departments or committees involved in achieving the objective or action.

Completion Date – The date the objective needs to be achieved.

Stage to Completion – The current percentage of the goal that has been achieved.