



2020-2021 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.

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: <i>Maintain current info on website and at least one social media outlet</i>	Clock-hour Accredited Educational Offerings: 6 educational events. <i>Metric Incentive begins with 3 sessions approved by EIC, ILEA, ASAE, etc.</i>

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



Member Retention Without Students: <i>70.1-75%</i>	Volunteer Engagement: <i>15.1-20%</i>	Governance: Update chapter bylaws & policy manuals by <i>July 1st</i>	Brand Compliance: <i>Meet guidelines consistently & in timely manner</i>	Content Satisfaction: <i>4.22-4.32% survey score</i>
Net Member Growth: <i>0.51-3.5%</i> <i>Metric Incentive begins with net member growth of 3.51%</i>	Global Trainings: Participation in globally mandated programs: <i>Online Chapter Leader Training, CAP, etc.</i>	Net Profit/Fiscal Sustainability: <i>1.1-5%</i> <i>Metric Incentive begins with net profit of 5.1%</i>		
Non-Member Conversion Rate: <i>2.1-10%</i>		Reserves as % of Fixed Annual Operating Expenses: <i>50.1-100% of target</i>		

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
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Metric Incentives: #1: Membership Satisfaction #2: Net Member Growth #3: Net Profit/Fiscal Sustainability
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#1 – Membership Satisfaction	Practice and encourage personal and constant contact with all members	Demonstrate the value of membership	Membership Team	Committees MarCom	June 30, 2021	%
	Action 1.1	Return of new member orientation; in person or virtual	Director of Recruitment	VP Membership Committees	Ongoing, on a monthly basis, the first week of each month if virtual; in addition to any other program scheduled, if in person.	10%
	Action 1.2	Recognition and celebratory programs; the first one to publicly announce new members; the second one to mark anniversaries or life altering events	Director of Retention	VP Membership Committees	Ongoing on a monthly basis via personal email and postings in social media (MPIOC Connect) first full week of each month	30%
	Action 1.3	Connect Café launched by Networking activity	VP Membership	Committees	Ongoing, at every live event scheduled (7)	n/a as no live events yet

Metric Incentives: #1: Membership Satisfaction **#2:** Net Member Growth **#3:** Net Profit/Fiscal Sustainability
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# 5 – Volunteer Engagement	Promote participation and involvement in chapter activities	Recruit 6-10 volunteers to help carry out membership activities	Membership Team	All Board members Committees	August 31, 2020	
	Action 2.1	Implement Ambassador and Buddy programs	Membership team	Committees from all other Board departments	Ongoing on a monthly basis	25%
	Action 2.2	Making MPIOC part of the community by giving back to a local organization in need	Membership team	All board members and committee members	June 30, 2021	10%
	Action 2.3	Recognition program for volunteer and sponsors	Director of Retention	VP Membership Committees from all other Board departments	June 30, 2021	25%
# 2 Membership Growth	Maintain the current number of members at 160; anything on top is gravy	Use the non-member lists we have in place as well as the hotelier prospect list	VP of Membership Director of Recruitment	Committees	Ongoing on a monthly basis	
	Action 3.1	Conduct (1) annual Member Recruitment Drive in February 2021	Membership team	Committees MarCom	February 26, 2020	20%

Metric Incentives: #1: Membership Satisfaction #2: Net Member Growth #3: Net Profit/Fiscal Sustainability
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	Action 3.2	Recruit faculty members and students and promote the annual Arlene Sheff Scholarship program. Got replaced by Mentor program	Membership team Office of the President	Committees Immediate Past President	Scheduled visits to targeted campuses, one per quarter, subject to schools being open	25%
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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
	Objective 1	Driving Attendance - at least 50 attendees (virtual) and 50 (live, based on guidelines)	VP of Education	Directors of Education/Edcon	July 1st 2020 - June 30th 2021 (ongoing)	
	Action 1.1	Keeping Fresh, Relevant and Exciting	VP of Education	Office of President, Communication	July 1st 2020 - June 30th 2021 (ongoing)	10%

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		Content and delivering it experientially				
	Action 1.2	Focus to increase new members and retain existing	VP of Education	Membership	July 1st 2020 - June 30th 2021 (ongoing)	
	Objective 2	Meeting Member's Content Needs				
	Action 2.1	Conduct a survey in June to gauge members interest in educational topics and additional surveys post each event to gauge educational value to the members. Goal = incentivize respondents to increase survey results.	Director of Education	VP of Education and Communications	July 1st 2020 - June 30th 2021 (ongoing)	100%
	Action 2.2	EIC Accredited Content	Director of EdCon	VP of Education and Director of Education	July 1st 2020 - June 30th 2021 (ongoing)	10%
	Action 2.3	Remain fluid and flexible in the topics and delivery of content based on the evolving	Director of Education	VP of Education and Director of EdCon	July 1st 2020 - June 30th 2021 (ongoing)	10%

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		climate of the meetings industry				
	Objective 3	Clock Hours for CMP				
	Action 3.1	Continue CMP Education Resources - Collaborate with EIC	Director of EdCon	VP of Education and Director of Education	July 1st 2020 - June 30th 2021 (ongoing)	10%
	Action 2.2	EIC Accredited Content	Director of EdCon	VP of Education and Director of Education	July 1st 2020 - June 30th 2021 (ongoing)	10%

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
3, 5	Objective 1	To achieve a level of member engagement of 50% via cross communication platforms: website, emails, Facebook,	VP Communications	Director of Marketing Director of Social Media Social Media Chair	6/30/2021	

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		Twitter, Instagram, LinkedIn, YouTube		Director of Membership		
3	Action 1.1	Continue highly successful Bi-Monthly At-A-Glance email Program if required (2 per month, 20 per year) but min. 1 per month and increase open rate from 20% to 23%	Director of Marketing	Admin, Director Education Director Special Events	6/30/2021	20%
3,5	Action 1.2	Produce Member emails and Quarterly E-News on (September 30, December 30, March 30, June 30), with new feature columns from members, paid sponsors, and to include Scholarships, call for Awards, and Chapter Survey.	Director of Marketing	Admin, VPs of all depts VP Finance	4/30/2021	10%
3	Action 1.3	Member Spotlight #ShareYourMPIstory Video or "Fun Facts" story on MPIOC social media channels 1 times per month as part of Member Monday.	Director of Social Media	Admin, VPs of Membership VP of Education	6/30/2021	20%

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3	Action 1.4	SOCIAL MEDIA: Increase Fans of All Social Media channels by 10% net total by incorporating creative video engagement (i.e. Reality show ... Board Members of MPIOC, Life of an OC Supplier, etc.)	Director of Social Media Director of Marketing	VPs of all depts	6/30/2021	10%
3, 5	Action 1.5	NEW: Develop 6 Podcasts working with Education and Membership and Finance 3 – Event Speaker Specific 3 – Member Highlights (CMP, SME, Awards, etc) – to feature members Sell Ad Space for Podcasts via Finance	Director of Marketing	Podcast Volunteer Incoming Pres – Jon Trask	6/30/2021	0%
1, 2, 3	Objective 2	To increase attendance at MPIOC Events, while highlighting sponsors and providing engagement across all communication platforms.				

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1, 3	Action 2.1	Work with MPIOC Admin and Event Directors to OPEN EVENT REGISTRATION TWO MONTHS BEFORE EVENT DATE (3 months prior to events, collaborate with Directors of Special Events, Education Events and Member Mixers for Cvent Event Forms and promotional information to launch event and promos)	Director of Marketing Director of Social Media	Director of Ed Events Director of Special Events Graphics & Social Media Coordinators	6/30/2021	10%
2	Action 2.2	Marketing MPIOC in Trade Press via ads, event promos, etc. Partner with OC Business Journal and others	Director of Marketing	Graphics Coordinator	6/30/2021	0%
3	Action 2.3	SPONSORSHIP Support: Provide sponsorship opportunities guide, fulfill sponsorship social media posts and social media takeover platforms.	Director of Social Media Director of Marketing	VP of Finance Graphics Coordinator	6/30/2021	100%
1	Action 2.4	Maintain and update MPIOC.org	Director of Marketing	Admin	6/30/2021	45%

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				Marketing Coordinator		
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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	Objective 1	Maintain a positive revenue balance through the term	VP Finance	Director Partnerships, Director Special Events	6/30/2021	0%
	Action 1.1	Perform a website and prospectus review to make any recommended changes with the Chapter Administrator and update prospectus with Communications team accordingly.	Director, Supplier Partnerships	Chapter Admin, VP Finance, Communications	7/31/2020	100%

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	Action 1.2	Partnerships: Bring in new sponsor partnerships through advertising in conjunction with Communications team, tabletops (virtual or in person) for events, and social media revenue on website or community channels.	Director, Supplier Partnerships	VP Finance, Finance Committee	6/30/2021	10%
	Action 1.3	Advertising: Provide advertising revenue totaling \$3,000.00 for the term via, website ads, social media and global ad income. Create opportunities during virtual events for suppliers.	Director, Supplier Partnerships	VP Finance, Finance Committee	6/30/2021	10%
	Action 1.4	Destinations:	Director, Supplier Sponsorships	VP Finance, Finance Committee	12/31/2020	0%

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		Proactively make a plan to reach out to destinations with opportunities to message and promote tourism amongst our members as they begin to reopen.				
1, 2, 3, 5	Objective 2	Plan and execute (5) special events	VP Finance	Director Special Events, Director Partnerships	6/30/2021	20%
	Action 2.1	Develop a committee of (3) MPIOC volunteers to plan and execute a Summer Social that includes an award ceremony component for the previous term.	Director, Special Events	Special Event Committee	8/31/2020	100%

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	Action 2.2	Develop a committee of (4) MPIOC volunteers to plan and execute a Holiday Social.	Director, Special Events	Special Event Committee	12/31/2020	0%
	Action 2.3	Develop a committee of (5) MPIOC volunteers to plan and execute an engaging, outdoor fundraising event, i.e. golf social.	Director, Special Events	Director Partnerships, Special Event Committee	5/30/2021	0%
	Action 2.4	Develop a committee of (3) MPIOC volunteers to plan and execute an interactive fundraising event, i.e. a walk-a-thon.	Director, Special Events	Director Partnerships, Special Event Committee	3/31/2021	50%
	Action 2.5	Develop a committee of (6) MPIOC volunteers to plan and execute	Director, Special Events	Special Event Committee	6/30/2021	0%

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		the Awards & Installation event.				
3	Objective 3	Manage Expenses	VP Finance	Finance Committee	6/30/2021	0%
	Action 3.1	Be more involved with all teams to help them manage their budgets more efficiently this term and help them find sponsorship resources for individual events.	VP Finance	Finance Committee	6/30/2021	10%
	Action 3.2	Proactively reach out and maintain a list of partner offerings and their desire to donate services readily available for all teams to use at their events.	Director, Supplier Partnerships	Finance Committee	6/30/2021	50%

Leadership:

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(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)	Notes	Stage to Completion at report out
1	Objective 1	Membership Engagement and Connection	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy		
	Action 1.1	OOTP to host a planner focus group to gather a needs assessment	PE	President, Communications, Education	10/30/2020		0%
	Action 1.2	OOTP to host a supplier focus group to gather a needs assessment	PE	President, Communications, Finance	04/30/2021		5%
4, 5	Objective 2	Prepare an Internal Chapter Contingency Plan for sustainability during a crisis or emergency					

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	Action 2.1	Review steps and best practices the chapter implemented during the Covid19 crisis	IPP	OOTP, Education, Finance, Communication, Membership, Admin.	10/31/2020		
	Action 2.2	gather information to create contingency plan	P	OOTP, Education, Finance, Communication, Membership, Admin.	2/26/21		10%
	Action 2.3	Create a standard plan and steps of emergency communications for our live events	PE	OOTP, Admin.	2/26/21		
	Action 2.4	Complete full emergency plan to submit (Rise Award?)	P	OOTP	5/15/2021		
1,2,3,4,5	Objective 3	Collaborate with other MPI Chapter to create a wider network of connections for our members					

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	Action 3.1	Joint Educational event (live, virtual, both) with San Diego	P	Education, Communications, Admin.	12/1/2020		40%
	Action 3.2	Joint Chapter event around GMID	IPP	Communications	5/1/2021		
	Action 3.3	Collaborative event with Northern Cal Chapter (including Sacramento)	P	OOTP	6/1/2021		60%
5	Objective 4	Create an OOTP /PE Committee					
	Action 4.1	Form a committee to assist OOTP	P	OOTP	11/26/2020		
	Action 4.2	Form a committee to assist PE with Retreats	PE	OOTP	12/31/2020		100%
1,2,5	Objective 5	Explore establishing an Advisory Council					
	Action 5.1	Invite high-level industry professionals	IPP	OOTP, Communications	3/1/2021		5%

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		to be a part of the MPIOC Advisory Council					
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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

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- 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.