## 2019-2020 Business Plan

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| **No.** | **Chapter Activity** | **Measurable Goals** | | **Budget** | |  | **Path to Achieve Goals** | **Event Date or Due Date** | | **Owners** | **Outcomes** |
|  |  |  | | **Rev** | **Exp** | **Net Profit** |  |
| **1 – EDUCATION** | | | | | | | | | | | |
| 1.1 | **Educational Programming / Supplier Exhibitor Opportunity** | * Produce a minimum of (6) chapter education meetings of relevant industry content (50% EIC certified) * (4) Exhibitor opportunities |  | |  |  | 1. (1) Venue & Contracts Chair – Secured Christina Bauders; Collaborate with Director of Education 2. Execute education programming: (2) Sept 2019 (Workshop / Education), (1) November 2019, (1) December 2019, (1) February 2020 and (1) April 2020 3. In collaboration with Membership seek feedback on needs for educational topics 4. Topics to include:   September: Tradeshows / Exhibitions - Laura Bohannon   1. Balance of topics / Speakers pending survey 2. Exhibitor Tables – (5) at each education event with exception of December. 3. (3) Chairs each to cover (2) Educational Events + (1) volunteer to support each Chair 4. Contract Speakers and Venues by TBD | | **9/17/19**  **11/19/19**  **12/17/19**  **2/18/20**  **4/2/20** | **VP EDUCATION** |  |
| 1.2 | **CMP Study Group** | * (7) week study group sessions providing tools and preparation materials consistent with CMP International Standards |  | |  |  | 1. (7) CMP Facilitator volunteers needed to execute and guide the session | |  |  |  |
| 1.3 | **Bootcamp – Intermediary level** | * (6) individual sessions of EIC Certified curriculum topics * Contracts * Developing Meeting Budgets * RFP Process * Venues * Audio/Visual   Food & Beverage |  | |  |  | 1. (6) Volunteers needed to execute education | |  |  |  |
| 1.4 | **Education & Events Committee Management** | * Create efficient and cohesive committee |  | |  |  | 1. VP Education / Director of Education and Director of Events to meet after Board Retreat to review Business Plan / Budget and strategize for Sip & Swirl recruitment efforts 2. VP Education / Director of Education and Director of Events to meet with Committee Chairs | | **June**  **On-Going** | **VP EDUCATION** | Monthly calls happening |
| 1.5 | **Special Events** | * Produce (7) chapter special events providing opportunity for recruitment of new members and volunteer engagement |  | |  |  | 1. One (1) Venue & Contracts Chair – Secured Christina Bauders; Collaborate with Director of Events 2. In collaboration with Membership seek feedback on ranking of special events | | **On-going** |  |  |
| 1.6 | **Sip & Swirl** | * Member appreciation and volunteer recruitment |  | |  |  | 1. Two (2) Co-Chairs Secured – Cristi Harris / Skye Barnes 2. River Cats Game / Sequoia at the Cannery | | **July (TBD)** |  |  |
| 1.7 | **Coffee, Cocktails & Content (Free Event)** | * Provide (3) events creating collaboration for Meeting Planners and Suppliers to discuss industry trends and hot topic; also, an opportunity for recruitment |  | |  |  | 1. One (1) Volunteer Needed – Marie Ziegler 2. Two (2) Topics Determined | | **October 17**  **January 16 August 22** |  |  |
| 1.8 | **February Event – Theme TBD** | * Execute successful fun event with some change to tradition |  | |  |  | 1. Pending survey | | **February** |  |  |
| 1.9 | **GMID Social Event** | * Celebration of GMID |  | |  |  | 1. One (1) Chair supported by (2) volunteers needed 2. Top Golf / Bowling Event; sponsored bays / lanes creating a new unique event around GMID 3. Generate interactive opportunities (i.e. passport) for engagement of Suppliers and Meeting Planners 4. Incent Meeting Planners to bring (1) meeting planner with them for a prize | | **April 2** |  |  |
| 1.10 | **Annual Dinner, Auction & Installation** | * Provide successful celebratory event for members and in-coming Board |  | |  |  | 1. One (1) Chair needed supported by (8) volunteers | |  |  |  |

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| **2 - FINANCE and STRATEGIC PARTNERSHIPS** | | | | | | | | | | | |
| 2.1 | **Financial** | * Complete and submit annual taxes * Allocate 30-45 minutes in each board meeting to discuss budget and make necessary decisions/ adjustments * Monitor membership dues and rebates from global, and affiliate membership dues | |  |  | |  | 1. Conduct Business Practice Audit and submit taxes to HQ 2. File State & Fed Gov. Recruit 4 committee members to assist with Audit, Advertising, and Sponsorship | **10/1/19**  **10/31/19**  **Ongoing** | **VP, FINANCE & Chapter Admin.**  **OOP**  **VP Finance, VP Membership, Chapter Admin** |  |
| 2.2 | **Special Events** | * Monitor all Revenue and Expense items as it pertains to education and special events | |  |  | |  | 1. Ensuring program chairs are adhering to budget/program guidelines and reporting budget discrepancies to the board. (list each education and event program) 2. Monitor registration and auction item revenues for events | **Ongoing** | **VP Finance, VP Special Events** |  |
| 2.3 | **Strategic Partnerships/Advertising** | * Continue to build and maintain key partnerships and sponsors * Solicit 3 individual Digital/Social Media Advertisements from supplier members | |  |  | |  | 1. Secure sponsors for each education program 2. Distribute sponsorship packet to suppliers 3. Promote digital advertising via stand-alone emails 4. Increase social media engagement with bi-weekly FB boosts 5. Managed in-kind agreements/sponsorships for photography, event registration and CA Meetings Mag | **Ongoing**  **7/31/19** | **VP FINANCE,**  **Director of Strategic Alliance** |  |

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| **3 – MEMBERSHIP** | | | | | | | | | | |
| 3.1 | **Membership Growth, Retention, Awards & Recognition** | * Achieve net member growth by 5% (NUMBER to be based on actuals as of June 30, 2019) | | $11,569 projected revenue | $1,100 total expenses projected  $250 | 10,469 net profit total expected | 1. Develop and award 1 recruitment campaign – comp membership for top recruiter of affiliates +/or new members 2. Quarterly Recruitment Campaign promotion 3. Reach out / greet non-members at education meetings 4. Increase affiliate memberships to 20 or more members 5. Board of Director outreach to non-members that attended recent event to determine conversion opportunity 6. Generate and complete TSR, and monthly membership reports for use in making conversion and solicitation opportunities of identified non-members, and cancellation resuscitation 7. Maintain a membership information/engagement table at 4 quarterly meetings/events | **Ongoing** | **Recruitment:**  **VP of Membership,  Dir of R&R and Recruitment Chair**  **Dir of R&R and Recruitment Chair w Marcom**  **Dir of R&R and Recruitment Chair**  **Director of R&R, Affiliate Chair**  **Board of Directors**  **VP of Membership, Dir of R&R and Recruitment Chair**  **Dir of R&R and Recruitment Chair** | pending  pending  pending  pending  pending  pending |
|  |  | * Maintain Membership Retention at 70% | |  |  | Use points from Global | 1. Greet new members at education meetings / provide ribbons / special welcome and seating at event / buddy system 2. Create new Membership Engagement committee associated with Retention committee 3. Prepare Membership Info Table documents to include upcoming event calendar, volunteer opportunities, quarterly membership campaigns info and as scheduled, spotlight winners of campaign, and other items to be determined. 4. Complete monthly TSR and generate monthly membership reports for use in making onboarding and retention calls 5. Award 3 Renewal scholarships to member volunteers in good standing using points system based with heavy volunteer measurement | Ongoing  Ongoing  Ongoing  Ongoing  Ongoing | **Recruitment and Retention: VP Membership, Director of R&R, Chairs of R&R**  **Retention: VP of Membership, Director of R&R**  **Retention: VP of Membership, Director of R&R**  **Retention: VP of Membership, Director of R&R, Retention Chair**  **Retention: VP of Membership, Director of R&R, Retention Chair** | Pending  Pending  Pending  Pending  Pending |
|  |  | * Increase Volunteers by 5% | |  |  |  | 1. Promote volunteer opportunities at Chapter Meet Up and info table 2. Create Affiliate Committee to work with Recruitment for renewals of current Affiliates and recruitment of new Affiliate members | Ongoing  Ongoing | **Retention: VP of Membership, Director of R&R, Board of Directors**  **Retention & Recruitment: VP of Membership, Director of R&R** | Pending  Pending |
|  |  | * Achieve minimum 20% Volunteer Engagement within Chapter | |  |  |  | 1. Develop and activate committee members: (1) Affiliates, (5) Retention, (3) Recruitment, (4+) A&R, for total of at least 13 volunteers | Ongoing | **Retention: VP Membership, Director R&R** | Pending |
|  |  | * Provide Membership Meet Up at 4 educational events / Or hold individual member orientation based on registration info | |  |  |  | 1. Partner with Events Committee for Meet Up pre event to be held for agenda/promotion /function space | Ongoing | **Retention & Recruitment: VP of Membership, Director of R&R and Education and Events Committee** | Pending |
|  |  | * Award and Recognize members | |  | $850 |  | 1. Ensure longevity pins are presented at each luncheon program as necessary 2. President Elect and Committee Chair to coordinate call for nominations for Awards: September = Crystal Platter Award, Rising Star and Chapter Leader of the Year awards, November = Supplier of the Year and Planner of the Year Awards 3. Author article for Connects for member recognition and promotion of renewal membership scholarship and award winners as applicable and coordinate timing with Publications Committee as needed for membership updates 4. Personal welcome call / letter from President to all new members upon joining to be made within one month of join date | Ongoing  Sept. 2019, Nov. 2019  Ongoing  Ongoing | **A&R: A&R Chair**  **A&R: President, A&R Chair**  **A&R: VP Membership, A&R Chair and Publications Chair**  **President to make call; Director to update reports** | **Award and Recognize members** |

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| **4 –MARCOM** | | | | | | | | | |
| 4.1 **PR/Comm** 20% volunteer engagement | * 1. **Increase Social Media presence**   2. **Facebook**   3. **Instagram**   4. **Linkedin**   **1.5 Social Media Committee** | * Increase number of posts to all social media platforms * Facebook: Manage likes, follows & shares. Increase follows by 5% (from 442 to 464) * Instagram: Manage likes, follows, & shares on Instagram Increase follows by 50% (from 65 to 98) * Linkedin: Manage follows & increase engagement * A minimum of two committee members |  |  |  | 1. Create 2 #’s (Ongoing MPISSN and Annual president term specific) & engagement opportunities at each chapter event 2. Utilize FB to: Share photos, promote event details/ link to event reg to increase engagement & event attendance 3. Share photos & videos before during and after event to drive excitement & showcase value of face to face experiences 4. Share a min of 6 posts/mo by 3 or more different people. 5. Assign committee members to different platforms | **By 6/4/19**  **6/30/2020**  **6/30/2020**  **6/30/2020**  **7/31/2019** | **VP/Dir of PR/Comm**  **Social Media Chair**  **VP PR/Comm**  **Social Media Chair, VP/Dir of PR/Comm**  **VP/Dir PR/Comm** | Engagement TBD  FB @ x%(x) |
| 4.1 **Marcomm** 20% volunteer engagement | **2.1**  **Encourage Personal Member Connections**  **3.1**  **Enhance Internal Communication**  **4.1**  **Strengthen Brand Awareness**  **5.1 Website**  **6.1 Publications**  **6.2 Publications Volunteers**  **7.1 Community Outreach** | * Distribute a minimum of 4 member videos telling their “story” * Work with each department to update a content calendar outlining marketing expectations * Promote member/Leader affiliation graphic for email signature * Ensure that website is up-to-date & accurate at all times; strategically use website to increase online presence * Produce and distribute quarterly newsletter * Produce and distribute 1 save the date postcard |  |  |  | 1. Interview members onsite at events for content to share their personal and/or MPI story 2. Connect monthly with other teams to understand their marketing needs 3. Commit to a monthly PR/Comm team meeting to discuss/update content calendar 4. Update affiliation with new logo 5. Promote through available platforms 6. Review all sections of the website monthly  * Solicit content for each newsletter * Design postcard with education and events and distribute |  | **VP/Dir Marcom**  **Board** |  |

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| **5 – PRESIDENT/SPECIAL PROJECTS** | | | | | | | | | |
| 5.1 | **Volunteer Recruitment, Engagement and Recognition** | * Manage the Volunteer A La Carte Program and track volunteer hours per month * Write 4 articles on volunteer of the quarter for connects * Connect with new members to welcome to the chapter * Recognize volunteers at least once annually at Sip and Swirl |  |  |  | 1. Solicit board members on their volunteer efforts 2. Invite current volunteers to the two events where they are recognized 3. Attend committee meetings when available 4. Sit with new people at any MPI event | **Quarterly/**  **July 2019** | **PE**  **OOP**  **President**  **President/ PE** | 1. Volunteer engagement and satisfaction |
| 5.2 | **Commence Chapter Administrator Annual Review** | * To provide feedback to the chapter administrator, and to seek feedback from the chapter administrator |  |  |  | 1. Solicit feedback from board members via survey 2. OOP to complete the CAP survey from MPI global 3. OOP meets with chapter administrator to review information and talk about results | **6/30/20** | **President**  **OOP** | 1. Proper management of the association 2. Implement changes |
| 5.3 | **Update and Maintain Policies and Procedures** | * Ensuring we are adhering to our policies and procedures * Making changes as necessary |  |  |  | 1. Continuously reviewing P&P document | **ONGOING** | **IPP/OOP** | Always updated and current P&P |
| 5.4 | **Presidents outreach** | * 2 times a year presidents outreach with social event |  |  |  | 1. Inform and Invite local meeting planners | **6/30/2020** | **OOP** | Engage with current members and recruiting potential new members  To keep open dialogue  Activate 10 new volunteers |
| 5.5 | **Convene and manage the nominations process** | * Convene the members of the nominating committee |  |  |  | 1. Committee members will be the OOP and 4 members at large who will not be on the board 2. Call for nominations 3. Nominations close 4. Conduct candidate interviews in person or via Skype 5. Determine slate and present to board 6. Slate posted 7. Slate submitted to MPI Global | **7/31/2109**  **11/6/2019**  **1/4/2020**  **1/15/2020**  **1/21/2020**  **1/25/2020**  **3/1/2020** | **Immediate Past President** | To ensure the success of the organization through the succession |