



MPI Arizona Sunbelt Chapter

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. 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: <i>60.1-70%</i> <i>Metric Incentive begins with member satisfaction of 70.1%</i>	Succession: Complete board slate due to MPI Global by <i>March 1st</i>	Compliance: All documents reviewed by <i>June 15th</i> . File with MPI Global by <i>July 1st</i>	Community Presence: <i>Maintain current info on website and at least one social media outlet</i>	Clock-hour Accredited Educational Offerings: <i>6 educational events.</i> <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: 70.1-75%	Volunteer Engagement: 15.1-20%	Governance: Update chapter bylaws & policy manuals by July 1 st	Brand Compliance: Meet guidelines consistently & in timely manner	Content Satisfaction: 4.22-4.32% survey score
Net Member Growth: 0.51-3.5% <i>Metric Incentive begins with net member growth of 3.51%</i>	Global Trainings: Participation in globally mandated programs: Online Chapter Leader Training, CAP, etc.	Net Profit/Fiscal Sustainability: 1.1-5% <i>Metric Incentive begins with net profit of 5.1%</i>		
Non-Member Conversion Rate: 2.1-10%		Reserves as % of Fixed Annual Operating Expenses: 50.1-100% of target		

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
	Objective 1 Maintain or increase at .51% in membership	The what ... establish sales team	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	0%
	Engage Internally	Engage internally with MPI Members	VP Membership	Communications	6/30/2021	
	Engage Externally	Engage Externally with MPI Members	VP Membership	Communications	6/30/2021	
	Objective 2 Membership Retention of 73% or better without students					0%
	Show value in membership	Focus on career development and education / networking events	Director of Membership	Education Communications	6/30/2020	

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

	Provide incentives for long-term members	Focus on career development and education / networking opportunities	Director of Membership	Education Communications	6/30/2021	
	Show incentives for short-term members	Focus on career development and education / networking opportunities	Director of Membership	Education Communications	6/30/2021	
	Objective 3 Host 5 Networking events – virtual or in-person		Director of Membership			0%
	Assign a VP or Executive Board member to lead each event	Show solidarity and transparency with access to the board and leadership within the industry	VP of Membership	Executive Board	6/30/2021	
	Select Dates and Locations (or virtual) and add to chapter calendar		VP of Membership	Communications	9/02/2020	
	Objective 4 Membership Satisfaction Survey or 75% or Better		Director of Membership			0%

	Input / update and complete content for the survey.		Director of Membership	Communications	1/31/2021	
	Collect results		Director of Membership	Communications	1/31/2021	

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	Restructure, plan and execute a virtual CMP U	Incorporate a fully engaging program using a virtual medium which allows for a wider attendance range with little or improved impact on the chapter budget allocated to this program.	VP Education	CMP U Committee Chair	06/30/21	0%
#1	Plan & Execute 1 EduCon	Create a fully immersive experience for our chapter, in which enriching educational & network opportunities are provided.	Director of Special Education Projects	EduCon Committee	06/30/21	

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

#1	Maintain Education Satisfaction Score of 4.5		VP of Education		06/30/2021	0%
	Plan & Execute 5 Educational Programs		VP Education	Monthly Program Chair	06/30/21	

#4	Continue to be a CMP Preferred Provider		VP Education	Director of Special education projects & Monthly Program Chair	06/30/21	
#4	Provide a minimum of 3 EIC Approved CEU credit hours					

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	Achieve >25% participation in Chapter Needs survey	Assess member satisfaction and implement actions throughout the year	Director, Communications	Current BOD	1/31/21	0%
	Create, distribute and tally survey of membership responses			Current BOD	1/31/21	
	Report survey results to BOD			VP, Communications	12/15/20	
5	Maintain a robust community outreach program offering a variety of opportunities in 2020-2021	Support local charities and provide networking opportunities for members	VP, Communications	Chair, Community Outreach	06/30/21	0%
	Conduct one community outreach program in December 2020			Chair, Community Outreach	12/31/20	0%
	Develop (3) charitable projects in conjunction with Education			Chair, Community Outreach	6/30/21	0%

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

	Programs & Networking Events			Education Membership		
1	Maintain open rate of 29% or higher for Monthly Newsletter	Publish Chapter Newsletter and run monthly reports	Director, Communications	Current BOD	6/30/21	0%
1	Increase social media followership by 5% from June 2020 baseline	Engage members on FB, LinkedIn, Twitter and other outlets	Director, Communications	Chair, Social Media Chapter Membership	6/30/21	0%
	Track new followers, shares and like. Tally results at year end.					
1	Maintain Chapter website with monthly updates with relevant information and events	Monitor website to ensure information is updated and current	Director, Communications	Chair, Website Current BOD	6/30/21	0%
	Work with webmaster to supply chapter news, program registrations and department pages			Chair, Website Chapter Webmaster		



	Remove and/or archive expired information					
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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	Raise \$11,000 at 3 fundraising events	Conduct 3 fundraising events with overall goal of \$11,000 in net-profits	Director of Special Events	VP Finance	04/30/21	0%
	Raise \$3,000 at the Golf Tournament		Director of Special Events		9/25/2020	
	Raise \$3,000 at the Holiday Party		Director of Special Events		1/31/21	
	Raise \$5,000 at the Spring Fundraiser		Director of Special Events		4/30/21	
3	Secure a minimum of \$12,500 in Sponsorships		Director of Strategic Alliances	VP Finance	6/30/21	0%
	Sell "easy" sponsorships with the Buy Now buttons on the website		Director of Strategic Alliances	Director of Communications	6/30/21	

	Revise and simplify annual sponsorship program				6/30/21	

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
5	Achieve 30% volunteer engagement ratio		PE	All BOD	06/30/21	0%
	Conduct Volunteer-a-thon phone bank	Identify where volunteers are needed Call all members and ask them to volunteer	PE	VP Membership	10/01/21	
1	Target 3% increase in member satisfaction rate YOY on global survey	Achieve overall satisfaction score of 77%	President	Other Committees/Positions involved	06/30/21	0%
	these will be filled in once we have results				10/01/21	0%

5	Improve Overall Leadership Experience at board level		President, PE, IPP			50%
	Provide ongoing support by Meeting with each VP one on one 3x	Schedule meetings with each VP	PE	All VP's	04/3/2021	0%
	Improve onboarding process for new board members by completing a comprehensive transition plan for all departments to follow	Using resources available on CLRP, customize to fit AZ Sunbelt needs edit and include roadmaps prepared during 19-20 term	President, PE	IPP, VPs		

Other (As Needed By 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-Ups, etc.)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out

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.