

Rocky Mountain Chapter 2018-2019 CHAPTER BUSINESS PLAN



2018-2019 ANNUAL BUSINESS PLAN

MPI Global Vision Statement:

To be the first choice for professional career development and a prominent voice for the global meeting and event community

MPI Global Mission Statement:

To provide MPI members, chapters and the global meeting and event community with innovative and relevant education, networking opportunities and business exchanges, and to act as a prominent voice for the promotion and growth of the industry

Chapter Purpose Statement

As a chapter we:

Are member and community centric

Lead with integrity

Ensure transparency at all times

Consistently encourage a visionary and relevant approach

Chapter Performance Standards: Scores below are based on Sustaining Performance and should be considered minimum benchmarks.

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| Membership | Leadership | Admin & Financial | Communications | Educational Offering |
|---|--|---|--|---|
| Satisfaction: 8.00 – 8.50 | Succession: Full Slate | Compliance: All Documents by June 15 th Annually | Community: Up to date Website and Social Media | Maintain Minimum Satisfaction Score: |
| Retention: 70-75% | Volunteer Ratio: 20-25% | Governance: Bylaws & P&Ps Current | Brand Compliant – Across all platforms | Execute a minimum of 6 Educational Events |
| Net Member Growth Achieve: 0.51 – 3.99% | Global Trainings: Participation in Minimums (4 attendees CBS/New board members attend Board 101) | Net Profit: 1% or higher | | |
| Non-Member Conversion Achieve: 2-10% | | Reserves: 6 months operating expenses | | |

| Business Plan Component Descriptions | | | | | |
|---|---|---|--|---|---|
| Strategic Initiative | Strategic Objective | S.M.A.R.T. Goals | Owner | Target | Progress |
| A broadly defined idea that provides an overview of the categorical direction of the organization (dept., product, service, etc.) | A broadly defined strategy to support its corresponding initiative (focus) (WHAT) | The specific, measureable, achievable, realistic & time-based action to support its corresponding objective (HOW) | The organizational member assigned to the execution of the S.M.A.R.T. Goal | Goal date of completion (e.g., "No Later Than", or "On Or Before.") | Subjective percentage (%) of completion identified during ongoing monitoring and evaluation |

| Strategic Initiative (Department) 1: MEMBERSHIP | | | | |
|--|---|------------------------------------|---------|--------------------|
| Strategic Objective | S.M.A.R.T. Goal | Owner | Target | Milestone/Progress |
| 1.1 Retain More New Members | 1.1.1 Identify 12 "high risk" renewals by the end of year. Encourage renewals with incentives such as free education or event within 30 days of signing in. | VP of Membership | 6/30/19 | 0% |
| | 1.1.2 Connect with all new members every month to retail 75% of our membership base | Director of Member Care | 6/30/19 | 0% |
| 1.2 Build Volunteer Base | 1.2.1 Call every new member and anyone who wants to volunteer the month they join or fill out volunteer form | Director of Leadership Development | 6/30/19 | 0% |
| | 1.2.2 A chair and spare per committee | Director of Leadership Development | 9/20/18 | 0% |
| 1.3 Grow Membership to meet global standard | 1.3.1 Incentives to sign up such as gift cards at every education event to reach 15% or (65 members) | Director of Recruitment | 6/30/19 | 0% |
| | 1.3.2 Go to the schools at least once a | Director of Recruitment | 6/30/19 | 0% |

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| | semester | | | |
| | 1.3.3 Attend PYMID | Director of Recruitment | 7/20/18 | 0% |
| | 1.3.4 Reach out to over a year lapsed members every month | Director of Recruitment | 6/30/19 | 0% |
| 1.4 Engage Students | 1.4.1 Budget \$1000 for student development. Ideas to be presented at August BOD meeting | VP of Membership | 8/1/18 | 0% |

| Strategic Initiative (Department) 2: ADMIN & FINANCIAL | | | | |
|--|--|---|---------|--------------------|
| Strategic Objective | S.M.A.R.T. Goal | Owner | Target | Milestone/Progress |
| 3.1 Streamline Sponsorship Process | 3.1.1 List all RFPs for the year by 7/1/18 | Director of Strategic Alliance | 7/1/18 | 0% |
| | 3.1.2 Monthly call for sponsorships in MM | Director of Strategic Alliances, Director of Fundraising, Director of Special Events | Weekly | 0% |
| 3.2 Increase Net Income Generated by Finance Events | 3.2.1 Increase attendee experience at events to increase revenue by 10% | Director of Fundraising | 6/30/19 | 0% |
| | 3.2.2 Publish Silent Auction Opportunities by 5/30/18 | Director of Fundraising | 6/20/18 | 100% |
| | 3.2.3 Schedule monthly check in with Finance Department | VP of Finance | 6/19/19 | 0% |
| 3.3 Increase member engagement | 3.3.1 Submit completed event information to Communications two months prior to event | Director of Strategic Alliances & Director of Special Events | 6/19/19 | 0% |
| 3.4 Develop larger dedicated group of volunteers | 3.4.1 Work with Leadership Development to increase volunteers by 6/30/18 | Director of Strategic Alliances & Director of Special Events, Director of Fundraising | 6/19/19 | 0% |

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| Strategic Initiative (Department) 3: LEADERSHIP |
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| Strategic Objective | S.M.A.R.T. Goal | Owner | Target | Milestone/Progress |
|---|---|-----------------|-----------------|--------------------|
| 3.1 Breakdown the policies and procedures and bylaws into Cliffs notes (which originated in NE) | 3.1.1 Present Cliffs Notes (we will call them Tiff's Notes) of portions of the bylaws at each BOD meeting. | IPP | 1/1/19 | 0% |
| 3.2 Conduct nominations in accordance with global timeline | 3.2.1 ID 5 members for the nominations committee in good standing Including IPP - Chair & PE | P | July 30, 2018 | 0% |
| | 3.2.2 Rework nominations questionnaire to be more specific by October 5, 2018 | IPP | October 5, 2018 | 0% |
| | 3.2.3 Submit slate to Global by March 1, 2019 | IPP | March 1, 2019 | 0% |
| 3.3 Present membership with survey to provide insight into needs and desires to keep engaged and informed. | 3.3.1 Conduct one survey in March so that valuable and informative data is available for mid-year check-in of success and needs | President | March 2019 | 0% |
| 3.4 Assist and guide the BOD team in successful completion of all goals | 3.4.1 Meet with each BOD member at least 2 times during the year | President | June 2019 | 0% |
| 3.5 Offer one program for enhanced Planner engagement (risk management) | 3.5.1 Offer One Enhanced Planner Engagement with Risk Management | VP of Education | November 2018 | 0% |
| 3.6 Breakdown Google usage into a manageable and organized process. | 3.6.1. Create a SOP for Google products by August 31, 2018 | IPP | August 2018 | 0% |

| Strategic Initiative (Department) 4: COMMUNICATIONS | | | | |
|--|-----------------|-------|--------|--------------------|
| Strategic Objective | S.M.A.R.T. Goal | Owner | Target | Milestone/Progress |

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| 4.1 Research, understand, test & present mobile app applications, to make decision to keep or not. | 4.1.1 Understand the capabilities of the app and what uses the chapter has for it by 7/31. | VP of Marketing | March 22, 2019 | 0% |
| | 4.1.2 Focus group discussion with key leaders and BOD, collect chapter members feedback in Sept 20 Education Survey | VP of Marketing | March 22, 2019 | 0% |
| | 4.1.3 present to the board for action. | VP of Marketing | March 22, 2019 | 0% |
| 4.2 Survey membership to determine value of printed directory | 4.2.1 4 x Aug MM 2 question survey data collection w | Director of Publication | October 2018 | 0% |
| | 4.2.2 Include on September Monthly Educational Survey and Informal verbal polling. | Director of Publication | October 2018 | 0% |
| | 4.2.3 Present data and vote at Oct BOD | Director of Publication | October 2018 | 0% |
| 4.3 Recruit & Engage robust volunteer team to include content writer and proof reader | 4.3.1 Build and maintain a volunteer base of 8 members for Communications by September 30, 2018 | Director of Publication | September 2018 | 0% |
| | 4.3.2 Work with DLD to reach out with Communication volunteer opportunities | Director of Publication | September 2019 | 0% |
| 4.4 Increase FB follows by 75 and Instagram by 200 with paid for boosted posts | 4.4.1 New Member Social Media Welcomes 1x per month Research the costs of boosting posts | Director of Marketing | March 2019 | 0% |
| | 4.4.2 BOD driven posts every week | Director of Marketing | March 2019 | 0% |
| | 4.4.3 Drive to push Instagram followers at monthly programs with contest | Director of Marketing | March 2019 | 0% |

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| Strategic Initiative (Department) 5: EDUCATIONAL OFFERINGS | | | | |
|---|---|---|-----------------|--------------------|
| Strategic Objective | S.M.A.R.T. Goal | Owner | Target | Milestone/Progress |
| 5.1 Secure an MPI Foundation Grant | 5.1.1 Secure a minimum of \$1500 in grants | VP of Education | July 1, 2019 | 0% |
| 5.2 Execute 2 New Program Formats | 5.2.1 Study Trends | VP of Education | August 31, 2019 | 0% |
| | 5.2.2 Poll Members | VP of Education and President | August 31, 2018 | 0% |
| | 5.2.3 Execute Program | VP of Education and Director of Education | May 31, 2019 | 0% |
| 5.3 Offer Superior Education to our Members | 5.3.1 Execute 6 educational programs from September 2018 - May 2019 | VP of Education and Director of Education | May 31, 2019 | 0% |
| 5.4 Maintain current education survey score, as well as change survey to a 5-point scale | 5.4.1 Maintain 4.7 (based on 5 pt cale) | VP of Education and Chapter Admin | 9/1/2018 | 0% |