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 three (3) core areas of performance standards by which your chapter is measured:
  - Membership = VP of Membership
  - Education = VP of Education
  - Finance = VP of Finance
- 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 – Seven (7) statistical goals tied to high-performing chapter standards, which qualify chapters to receive incentives and recognition at the annual chapter performance awards.

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability
#5: Reserves **#6** Education Content Satisfaction **#7** Clock Hour-Accredited Education

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	6/30/2022	0%
1	Action: Develop and Activate Member Recruitment Committee with a total of (3) volunteers	• 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	• 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	• Produce Member VIP Recognition Event and award (4) chapter membership renewals • Award member recruitment prize		Director of Member Care	May 24	0%

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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.

2022-2023 BUSINESS PLAN

MPI Global Vision Statement: Leading and empowering an inclusive 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. 1.

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Membership Satisfaction & Growth	Leadership & Engagement	Administration & Finance	Communication & Brand	Educational Offerings
Member Satisfaction: *61 – 70%* *Metric Incentive begins with member satisfaction of 71%*	Succession: Complete board slate due to MPI Global by *March 1*	Compliance: All documents filed with MPI Global by *June 15*	Community Presence: *Maintain current info on website and at least one social media outlet (not scored)*	Clock-hour Accredited Educational Offerings: *4 educational events.* *Metric Incentive begins with 4 sessions approved by EIC, ILEA, ASAE, etc.*
Member Retention Without Students: *65.1 - 70%* *Metric Incentive begins with member satisfaction of 70.1%*	Volunteer Engagement: *Maintain a healthy pipeline (not scored)*	Governance: Update chapter bylaws & policy manuals by *June 15*	Brand Compliance: *Meet guidelines consistently & in timely manner (not scored)*	Education Content Satisfaction: *4.22-4.32% survey score*
Net Member Growth: *0.1 -3%* *Metric Incentive begins with net member growth of 3.1%*	Global Trainings: Participation in globally mandated programs: *Online Chapter Leader Training, CAP, etc.*	Net Profit/Fiscal Sustainability: *0.1 - 1%* *Metric Incentive begins with net profit of 1.1%* Reserves as % of Fixed Annual Operating Expenses: *25.1-75% of target*		

Membership:

(Note: Membership goals should be reflective of growth, retention, engagement, satisfaction, etc. Chapter Admin to provide net member growth, and member satisfaction goals below prior to dissemination)

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability
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Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
Membership Growth/Recruitment	Maintain/achieve net member growth minimum of 0-2.5%	Membership continues to be fluid with the changes of the industry and we will at minimum maintain our 2021-2022 membership numbers	VP of Membership	Director of Membership and Board of Director	06/30/2023	0%
	Develop and award one (1) recruitment campaign/comp membership with volunteer engagement commitment from award recipient\n\nTarget is at least 1 new member	Based on receiving financial support from MPI Global either through sponsorships or incentive	VP Membership and Director of Membership	Marcomm	06/30/23	0%
	Quarterly recruitment campaign	Market and promote quarterly campaigns for new memberships from MPI Global\n\nGoal of at least (1) new member per campaign	VP Membership and Director of Membership	MPI Global/ Marketing and Communications / Member Care and Recruitment Chairs	6/30/23	0%

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		Engage with non-members for education events	Reach out to non-members prior to education events. Invite to sit with board member(s)/past presidents at event/buddy system. Offer pre-event Zoom meeting for face to face introduction	VP of Membership and Board of Directors	Committee Chairs; Chapter Administrator	Ongoing throughout year	0%
		Generate and complete TSR, and monthly membership reports for use in making conversion and solicitation opportunities of identified non-members, and cancellation reinstates	Call / Email potential members based on reports with current recruitment campaign information	VP Membership and Director of Membership	Committee Chairs	Monthly	0%
		Provide membership information/ engagement at in-person events	Presence of volunteers/board members at events to answer questions about membership and encourage new enrollments	VP of Membership and Board of Directors	Board of Directors and Committee Chairs	Ongoing at events throughout year	0%
		Promote and recruit affiliate memberships	Market to other chapter members to	VP Membership and Director of Membership	Affiliate Chair	Ongoing	0%

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		enhance exposure to the SSN chapter Goal is for (7) affiliate memberships for the year				
Membership Retention	Maintain membership Retention of 68.1-70%	Membership continues to be fluid with the changes of the industry and we will maintain membership per MPI Global standards	VP of Membership	Director of Membership and Board of Directors	06/30/2022	
	Greet/announce new members at education meetings), provide ribbons at in-person events with special welcome and seating during event / buddy system provided to those interested. (Follow The frog?)	Recognition of new members with warm welcome to events. Pair with veteran MPI/SSN member/board member during attendance of first event	VP of Membership & Director of Membership	VP of Education and Events, Board of Directors, Committee Chairs, Chapter Administrator	Ongoing	0%
	Membership Meetup	Provide quarterly membership meetups events to welcome new members to chapter and connect with other chapter area members.	Director of Membership retention, Strategic Alliance	Director of Membership, Events Committee, Chapter Administrator	Quarterly	0%

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	Prepare Membership information for all education events or verbal updates at virtual events	Documents/info to include upcoming event calendar, volunteer opportunities, quarterly membership campaigns info and as scheduled spotlight winners of campaign, and other items TBD	VP of Membership	Director of Membership, Events Committee, Chapter Administrator	Ongoing	0%
	Complete monthly TSR and generate monthly membership reports for use in making onboarding and retention calls	Call/Email members who are due for renewal. Request testimonials from members that have been contacted or recognized through website recognition form.	VP Membership	Board of Directors, Marcom	Monthly	0%
	Achieve minimum 7.0-13.1 Volunteer Engagement within Chapter with a 5% increase in Membership volunteers	Develop active committee members: (1) Affiliate, (3) Retention, (3) Recruitment, for a total of 7 volunteers. 1.Promote volunteer opportunities at Chapter Orientation and info table				

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		2.Promotion via Affiliate Committee for engaging these members				
Membership Satisfaction	Membership Satisfaction Scores of 60.1-70%	Engage all members throughout year to enhance value of membership	Board of Directors	All Board Members and Volunteers	6/30/2023	0%
	Awards & Recognition	Recognize members throughout year with tenure pins, Crystal Platter, Planner of the Year, Supplier of the Year and Rising Star	VP of Membership	Awards & Recognition Chair	6/30/2023	
	DEI Taskforce	Continue DEI Focused task force to insure continued implementation for inclusive organization where all segments of membership feel welcomed and appreciated	Director of Membership	Board of Directors	Ongoing	
	Member Recognition	Personal welcome call /letter from President to all new members upon joining to be made	VP of Membership/President	VP of Membership/PresidentChapter Administration	Ongoing	

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		within one month of join date, 101 link				

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10 | Page

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
Education	Objective 1	The what …	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	10%
Provide (4) four Education Programs **Note: 4 accredited**	Content Satisfaction: 4.22-4.32 survey score	September 14- Boot Camp/Contracts November 9- Human Trafficing December 14- CalSAE March Education. GMID Watch Party 1st or 2nd week in April- Vendors, drinks, and 2 screens showing the GMID Screening.	VP Education & Events	Communications/Social Media	Ongoing throughout the year	0%

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Reboot GMID/Tradeshow	Content Satisfaction:4.22-4.32 survey score	Change GMID Format to a watch party, tradeshow, and networking event. Thank you notes to all speakers / sponsors upon conclusion of event	VP Education & Events	Director of Special Events	April	0%
Special Events	Objective 2					
Chapter Fundraiser	Content Satisfaction: 4.22-4.32 survey score	Signature Event Fundraiser Thank you notes to all speakers / sponsors upon conclusion of event	VP Education & Events	Director of Special Events	March	0%
Member Meet up	Content Satisfaction:4.22-4.32 survey score	Periodic meetups/happy hours/events designed for a variety of interests. Have Member Meet ups when we do ot have an educational event that month. Thank you notes to all speakers / sponsors upon conclusion of event	VP Education & Events	Director of Special Events		

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability
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Awards	Content Satisfaction:4.22-4.32 survey score	TBD - Format and date Thank you notes to all speakers / sponsors upon conclusion of event	VP Education & Events	Director of Special Events Awards Chair	June	0%
Member Town Hall	Content Satisfaction:4.22-4.32 survey score	Virtual Town Hall in August Thank you notes to all speakers / sponsors upon conclusion of event	VP Education & Events	Director of Special Events	August	0%
Volunteers	Engagement Strategy	Recruit, engage and activate volunteers for committees and events	VP Education & Events	Director of Special Events and all board Members	Ongoing	0%
Department Collaborations	Objective 3					
Finance	Monitor all Revenue and Expense items as it pertains to education and special events	Ensuring program chairs are adhering to budget/program guidelines and reporting budget discrepancies to the board. Monitor registration and auction item revenues for events	VP Finance	VP Finance	Ongoing	

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Communications	Marketing Strategy	Develop checklist of program information to be provided once speaker and topic are determined Copy to Strategic Alliance for financial details Get information to Marking 6 weeks before an event.	VP Education & Events	VP Comms	Ongoing	
Membership	Maintain a membership information / engagement campaign at meetings/events	Membership team provide information on recruitment campaigns and MPISSN updates to new potential members	VP Education & Events	VP Membership	Ongoing	

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14 | Page

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
Maintain Brand Standard	Education Support	Driving attendance and post-event engagement through social media, events and website Connect X times/mo	VP/Dir Comms	VP Education	June 2023 (monthly frequency)	
Maintain Brand Standard	Website Audit	Revising and updating webpage content, metadata, event schema, plugins, embeds and images	VP/Dir Comms	Internal	December 2022	
Maintain Brand Standard	Increasing Social Media following by 10% YOY	Utilizing 100 follower requests monthly in Linkedin Inviting previously engaged facebook members to follow	VP/Dir Comms	Internal	June 2023 (monthly frequency)	

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Maintain Brand Standard	Membership Support in the form of quarterly campaigns	E-blast/social campaigns to generate new memberships - Comp membership with volunteer commitment - Global offers Collecting content/ new member testimonials for distribution Member Mondays - benefits - campaign for new members - takeover - who are members?	VP/Dir Comms	VP Membership	June 2023 (monthly frequency)	
Sustainable Operating Procedures for future COMMS teams	Marketing and Communications Plan	Development of a complete marketing plan that can be used annually for content, PR, communications, social, that has room to adapt to future	VP/Dir Comms	Internal	June 2023	

Metric Incentives: #1: Membership Satisfaction **#2:** Member Retention without Students **#3:** Net Member Growth **#4:** Net Profit/Fiscal Sustainability
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		communications requests (global, etc.)				
Maintain Brand Standard	Strategic Alliances Support	Assist with sponsorship revamp, expanding Connect newsletter	VP/Dir Comms	Dir Strategic Alliances	December 2022	
Maintain Brand Standard	Volunteer Recruitment Campaign beginning 7/1 and monthly CTA	Finding volunteers for content creation Supporting other departments with recruitment	VP/Dir Comms	All	June 2023	

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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
	Objective 1	The what …	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	10%
	Solicit 8 year round partnerships	1 Diamond, 1 Emerald, 2 Ruby, and 4 Sapphire	Director of Strategic Alliance		9/1/22	
	Solicit sponsorships for all educational and special events	4 Educational Programs, Crab Feed, GMID, and Gala	Director of Strategic Alliance		6/30/23	
	Objective 2					
Compliance: All documents filed with MPI Global by June 15	Recruit, develop, and activate 4 Audit Committee members to assist with Audit.		VP of Finance		9/1/22 - Committee recruitment deadline	
	Conduct Audit and submit copy of taxes to Global.		VP of Finance		10/1/22 to Global	

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	File taxes with state and federal government.		VP of Finance		10/15/22 to state and federal governments	
	Objective 3					
Net Profit/Fiscal Sustainability: *0.1 - 1%* *Metric Incentive begins with net profit of 1.1%*	Allocate time at each Board Meeting to discuss the budget and make necessary decisions/adjustments.		VP of Finance		6/30/23	
	Run a cash flow analysis each month in CLRP.		VP of Finance		6/30/23	
	Monitor membership dues and rebates from Global, and affiliate membership dues.		VP of Finance		6/30/23	
Reserves as % of Fixed Annual Operating Expenses: *25.1-75% of target*	Keep at least $50,000 in our reserve account at all times.		VP of Finance		6/30/23	
	Move $1,000 into our reserve account.		VP of Finance		6/30/23	

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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
	Objective 1	The what …	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	%
	Action	The how …				
	Volunteer Recruitment, Engagement and Recognition	● Revitalize the Volunteer A La Carte Program and track volunteer hours per month ● Write an article on volunteer of the quarter for each connects ● Connect with new members to welcome to the chapter	**PE**	**OOP**	06/30/2023	

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		● Recognize volunteers at least once annually at Sip and Swirl				
	Objective 2					%
	Commence Chapter Administrator Annual Review (survey BOD)	● To provide feedback to the chapter administrator, and to seek feedback from the chapter administrator	**P**	**OOP**	06/30/2023	
	Objective 3					%
	Update and Maintain Policies and Procedures	● Ensuring we are adhering to our policies and procedures ● Making changes as necessary	**IPP**	**OOP**	06/30/2023	
	Objective 4					%
	Presidents outreach	● 2 times a year presidents outreach with social event ● Check in with board members	**P**	**OOP**	06/30/2022	

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		quarterly for "pulse checks"				
	Objective 5					%
	Convene and manage the nominations process	● Convene the members of the nominating committee	**Immediate Past President**		03/01/2022	

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22 | Page

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-Up's, etc.)

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborations	Completion Date (no later than)	Stage to Completion at report out
	Objective 1	The what …	Should be a single position, not a name	Other Committees/Positions involved	m/dd/yy	10%
	Action	The how …				
	Objective 2					
	Objective 3					50%

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24 | Page