**INSERT CHAPTER LOGO**

**201\_ - 201\_ 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

*[ADD PURPOSE STATEMENT HERE*

All Chapter Vision & Mission statements should be the same as Global. Each chapter may have an additional purpose or proposition statement to further clarify the chapter. Purpose statements should include the geographic location served, size of membership, make up of membership, hallmark events, buying power, or other defining information. Chapter purpose statements should not conflict with the Mission and Vision statement.]

**Chapter Performance Standards:**

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Membership** | **Leadership** | **Admin & Financial** | **Communications** | **Educational Offering** |
| Satisfaction: 8.00 – 8.50 | Succession: Full Slate | Compliance: All Documents by June 15th 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 |  |  |

**Education**

(Note: Education goals should be reflective of driving attendance, clock hours, meeting members content needs, etc. Not a list of chapter events, your metric content satisfaction goals)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
|  | **Objective 1.1** | Increase year-end average member educational event attendance by \_\_ (Insert starting benchmark example, 100 benchmark, goal 110) |  | VP of Education | Total of actions below | Total of actions below | 6/30/18 |  |
|  | Action 1.1.1 | Secure venues no less than 120 days in advance to ensure stronger marketing capabilities |  | Logistics Committee | $5000 | $3200 | 6/30/18 | 0% |
|  | Action 1.1.2 | Develop and utilize event logistics and marketing timeline to ensure deliverables are timely |  |  | $0 | $0 |  |  |
|  | Action 1.1.3 |  |  |  |  |  |  |  |
|  | Action 1.1.4 |  |  |  |  |  |  |  |
|  | Action 1.1.5 |  |  |  |  |  |  |  |
|  | **Objective 1.2** | Metric goal Increase or maintain average content satisfaction score of\_\_ |  | VP of Education |  |  | 6/30/18 |  |
|  | Action 1.2.1 | Launch and Analyze Chapter Needs Assessment Data |  | VP of Education |  |  | 12/30/17 |  |
|  | Action 1.2.2 | Research content options with peers from other chapters in region |  | VP of Education |  |  | 12/30/17 |  |
|  | **Objective 1.3** |  |  |  |  |  |  |  |
|  | Action 1.3.1 |  |  |  |  |  |  |  |
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**Finance**

(Note: Finance goals should be reflective of profit, managing expenses, sponsorship needs, reserves, etc. Your metric goals are included below for you.)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
|  | **Objective 2.1** | Metric Goal – Achieve net profit of no less than \_\_% |  | **VP of Finance** |  |  | **6/30/18** |  |
|  | Action 2.1.1 | Manage all special events to 25% minimum profit margin |  | VP of Finance |  |  | 6/30/18 |  |
|  | Action 2.1.2 | Manage all education events to minimum 15% profit margin |  |  |  |  | 6/30/18 |  |
|  | Action 2.1.3 |  |  |  |  |  |  |  |
|  | Action 2.1.4 |  |  |  |  |  |  |  |
|  | Action 2.1.5 |  |  |  |  |  |  |  |
|  | **Objective 2.2** | Metric Goal – Achieve net profit of no less than \_\_% |  | **VP of Finance** |  |  | **6/30/18** |  |
|  | Action 2.2.1 |  |  |  |  |  |  |  |
|  | **Objective 2.3** |  |  | **VP of Finance** |  |  | **6/30/18** |  |
|  | Action 2.3.1 |  |  |  |  |  |  |  |

**Membership**

(Note: membership goals should be reflective of growth, retention, conversion, engagement, satisfaction, etc. Your net member growth and conversion goals are included below for you.)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
| **1** | **Objective 3.1** | **Achieve \_\_% net member growth** |  | **VP of Membership** |  |  | **6/30/2\_** |  |
|  | Action 3.1.1 | Achieve a \_\_% non-member conversion from events |  | Director of Recruitment |  |  | 6/30/2\_ |  |
|  | Action 3.1.2 | Increase retention rate from \_\_% to \_\_% |  | Director of Retention |  |  | 6/30/2\_ |  |
|  | Action 3.1.3 |  |  |  |  |  |  |  |
|  | Action 3.1.4 |  |  |  |  |  |  |  |
| **3** | **Objective 3.2** | **Achieve \_\_% Member Response rate for the Member & Chapter Satisfaction Survey** |  | **VP of Membership** |  |  | **2/15/2\_** |  |
|  | Action 3.2.1 | Develop pre-survey communication plan to prepare membership |  | VP of Communications |  |  |  |  |
|  | Action 3.2.2 | Develop communication plan to membership during survey open period |  | VP of Communications |  |  |  |  |
|  | Action 3.2.3 |  |  |  |  |  |  |  |
|  | **Objective 3.3** |  |  |  |  |  |  |  |
|  | Action 3.3.1 |  |  |  |  |  |  |  |

**Communication**

(Note: Marketing& Communication goals should be reflective of growth opportunities in marketing the chapter, reach of membership, development of new outreach initiatives, etc.)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
| 3 | **Objective 4.1** | **Open event registration no less than 45 days prior to event** |  | **VP of Communication** | **$0** |  | **6/30/2\_** |  |
|  | Action 4.1.1 |  |  |  |  |  |  |  |
|  | Action 4.1.2 |  |  |  |  |  |  |  |
|  | Action 4.1.3 |  |  |  |  |  |  |  |
|  | **Objective 4.2** |  |  |  |  |  |  |  |
|  | Action 4.2.1 |  |  |  |  |  |  |  |
|  | Action 4.2.2 |  |  |  |  |  |  |  |

**Leadership/Office of the President**

(Note: Goals should be reflective of member engagement growth, satisfaction, training, processes. Volunteer metric engagement goal is included below for you)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
| 4 | **Objective 5.1** | **Maintain a Volunteer Engagement percentage of no less than \_\_% each month** |  | **Director of Leadership Development** |  |  |  |  |
|  | Action 5.1.1 |  |  |  |  |  |  |  |
|  | Action 5.1.2 |  |  |  |  |  |  |  |
|  | Action 5.1.3 |  |  |  |  |  |  |  |
| 4 | **Objective 5.2** | **Complete incoming board member onboarding/transition for upcoming year** |  | **President Elect** |  |  | **6/15/2\_** |  |
|  | Action 5.2.1 | Conduct Transition Meeting with current and incoming board members |  |  |  |  | 5/15/2\_ |  |
|  | Action 5.2.2 | Swearing in ceremony at June event |  |  |  |  | 6/\_\_/2\_ |  |
|  |  |  |  |  |  |  |  |  |
|  | **Objective 5.3** |  |  |  |  |  |  |  |
|  | Action 5.3.1 |  |  |  |  |  |  |  |

**Add Other Department Here**

(Note: Continue to copy/paste this section to add additional departments at your chapter.)

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| **Metric No.** | **Item** | **Description** | **Owner**  (Who is responsible?) | **Committee or Position** | **Budget** | | **Completion Date**  (No Later than) | **Stage to Completion e.g., 10%, 25%, 50%, etc.** |
| Expense | Revenue |
|  | **Objective 6.1** |  |  |  |  |  |  |  |
|  | Action 6.1.1 |  |  |  |  |  |  |  |
|  | Action 6.1.2 |  |  |  |  |  |  |  |
|  | Objective 6.2 |  |  |  |  |  |  |  |
|  | Action 6.2.1 |  |  |  |  |  |  |  |
|  | Action 6.2.2 |  |  |  |  |  |  |  |
|  | **Objective 6.3** |  |  |  |  |  |  |  |
|  | Action 6.3.1 |  |  |  |  |  |  |  |
|  | Action 6.3.2 |  |  |  |  |  |  |  |