

# STRATEGIC



**ARMARION SOLUTIONS**  
INNOVATIVE SOLUTIONS FOR SMALL BUSINESS

November 2, 2016

## AGREEMENT TO ENGAGE

### Multi-Year Chapter Leadership Retreats

#### Client

**MPI Northern California Chapter**  
**Marilee Sonneman, CMP, DMCP**  
President  
2440 Camino Ramon, Suite 273  
San Ramon, CA 94583

Thank you for the opportunity to work with you for your upcoming Leadership Retreats. This document will serve as a formal contract for facilitation/speaking services by Armarion Solutions to your organization. This agreement contains the components for a fee schedule and timelines. If you have any questions, or need clarification on any item found within this agreement, please feel free to contact us and we will be happy to schedule a convenient time on both our calendars to visit with you. We look forward to working with you.

#### Event Dates/Locations

**Date:** January 27-28, 2017  
**Location:** Monterey, CA

**Date:** April 21-22, 2017  
**Location:** TBD

**Date:** January 26-27, 2018  
**City:** TBD

#### I. Scope of Work

**Annual Leadership Retreat:** Facilitate planning & retreat to meet MPI global requirements for all MPI Chapters & other items as agreed upon by Client & CBM.

**Mid Year Retreat(s):** Facilitate planning & retreat to meet MPI global requirements for all MPI Chapters & other items as agreed upon by Client & CBM.

#### II. Facilitation Fee Schedule

##### INSIDE THESE MEETINGS

##### Annual Retreat:

The primary purpose of an annual retreat is to develop a roadmap for the year to provide clarity on not only what we are doing, but how we are doing it so that we can ask ourselves the question, "Are we meeting the needs of our membership?"

##### Mid-Year Retreat:

The primary purpose of a mid year retreat is to take a pulse on how we are not only operating our business and meeting our goals & objectives, but to allow time to stop and ask ourselves the question, "Are we meeting the needs of our membership?"

##### Retail Facilitation Fees

\$3,250.00 First Day / \$1,625.00 Each Additional ½ Day (*no remittance for travel time*)

##### Your Facilitation Fees

\$2,250.00 for each retreat (*1.5 or 2 day retreats - MPI Discount Applied*)

#### III. Travel Related Expenses

Client will be responsible for all travel related expenses incurred (*i.e., airline (Delta Airlines - Preferred Carrier), hotel, food, ground transportation on both ends, etc.*). We will make the arrangements for air travel (*with client approval prior to finalization*). Client will secure hotel accommodations and ground transportation at retreat location and will advise of arrangements made. Regarding accommodations, preferred room type is "King" (*if available*). In the event an amenity is placed in my room (*which is certainly not necessary*), please ensure no alcohol is included.



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### IV. Tools & Instrumentalities

To include, but not be limited to, one pre event planning call **(to include incoming (for Annual) and current (for Mid-Year) President, PE, IPP, CBM, Chapter Administrator/Executive Director and Facilitator)** to determine objectives, development of pre-retreat questionnaire to be completed by retreat attendees *(if requested by Client)*, and access to online post event retreat evaluation product for each retreat.

### V. Terms & Conditions

Facilitation fees for each retreat will be due and payable in full on site at the completion of the retreat. An invoice will be submitted to client upon booking of any airline tickets prior to retreats and needs to be remitted upon receipt.

All remaining transportation expenses incurred by Armarion Solutions will be due and payable by client upon receipt of invoice and receipts as backup. Client agrees to remit payment on said expenses and remittance mailed directly to us at the address listed below (page 3).

**All checks should be made payable to: Rick Weaver**

### VI. Cancellation Policy

Should any event be cancelled for any reason between 6 months to 3 months prior to event, client will be responsible for 50% of facilitation fees to Armarion Solutions. Should any event be cancelled for any reason 89-60 days prior to event, client will be responsible for 75% of facilitation fees to Armarion Solutions. Should any event be cancelled for any reason 59-1 day(s) prior to event, client will be responsible for 100% of facilitation fees to Armarion Solutions. Should Armarion Solutions cancel any event for any reason after contract signing, 100% of any pre-paid fees for that event will be refunded to the Client.

### VII. Force Majeure

The performance of this agreement by either party, in part or in full, is subject to events or occurrences beyond their control such as, but not limited to, the following: acts of God, war, fire, earthquakes, accidents or other casualty, strikes or threat of strikes (exception: neither party may terminate or suspend this agreement for strikes, labor disputes or work stoppages involving their respective employees or agents), curtailment of transportation services or facilities preventing attendees from attending, or a similar intervening cause beyond the control of either party making it illegal, impossible, or commercially impracticable to hold the event at the venue or to provide the services outlined in this agreement. Either party may terminate, suspend, or partially perform its obligations under this agreement without liability or further obligation by written notice to the other party if such obligations are delayed, prevented, or frustrated by any of the above events.

### VIII. Miscellaneous

#### Retreat Attendee Pre-Work (Mid-Year & Annual Retreats)

##### Annual Retreat

Client will be prepared to present a "Draft" (or finalized) budget; draft education plan, draft succession plan, draft business plan and draft member on-boarding plan on site at the retreat.

##### Mid-Year Retreats

Client will be prepared to review progress on chapter budget; education plan, succession plan, business plan and member on-boarding plan on site at the retreat.

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## VIII. Miscellaneous

In addition, the following **documents/statistics** will need to be available at onsite for review should we need them:

**Previous Fiscal Year's Metrics** (*Annual Only*)

**Previous Fiscal Year's Budget** (*Annual Only*)

**Most Recent Chapter Satisfaction Survey Results** (*Annual Only*)

**Most Current Membership Statistics to include:**

- Current Total Members (by member category) (*Annual & Mid-Year*)
- Member Cancellations for Current Fiscal Year (*Annual & Mid-Year*)
- Member Transfers for Current Fiscal Year (*Annual & Mid-Year*)

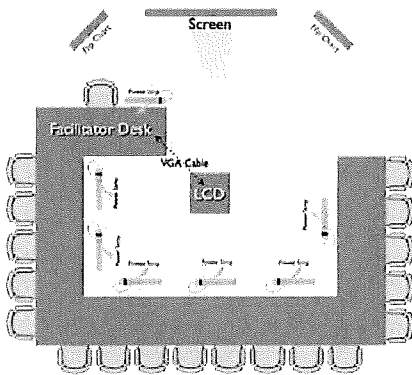
**Current Fiscal Year Volunteer Statistics** (*Annual & Mid-Year*)

(The majority of this information can be found on your Chapter Dashboard)

### Presentation Model

Each incoming VP will be required to use the MPI Global "Presentation Model" template during the retreat for departmental presentations. The template can be secured through your CBM if you don't already have it. We will discuss this during our planning call for any training that needs to occur.

## IX. Room Setup



- U-Shape Set
- 6' skirted table/chair up front (my "desk") w/power strip
- LCD Projector
- Screen
- Audio Patch (from my laptop) into House System (if available – please advise if not available)
- Two (2) Flip Charts
- Power Strips for attendees laptops
- Printed table tents for each attendee (see sample below)

**Jane Smith**

**Vice President, Membership**

Sr. Meeting Planner, Microsoft Corporation

## X. Signatures

### Client / Client Representative

*Lori Kinsey*  
Signature

*11/10/16*  
Date

*Lori Kinsey*  
Printed

*(925) 785-5409*  
Mobile Phone

**Armarion Solutions**

*[Signature]*  
Signature

November 17, 2016  
Date

**Rick Weaver, Chief Inspiration Officer**

83-85 116th Street, #4G, New York, NY 11418 (**before 12/15/16**)

2300 Grayson Drive, #217, Grapevine, TX 76051 (**after 12/20/16**)

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