



FY2025 ANNUAL RETREAT GLOBAL UPDATE



CHAPTER OPERATIONS TEAM



Timothy Gunn

**Senior Director of
Community**



Federico Toja

**Director of Chapter
Operations – Europe,
Japan and Latam**



Leslie Scantlebury

**Regional
Operations
Manager**



Marcelo DeOliveira

**Regional
Operations
Manager**



**Angela Layton,
CMP Fellow, CMM, DES**

**Regional
Operations
Manager**

MEMBER ENGAGEMENT TEAM



Christine Richards
Manager, Membership
Development



Teresa Saucedo
Member
Engagement Rep



Marlene Jackson
Member
Engagement Rep

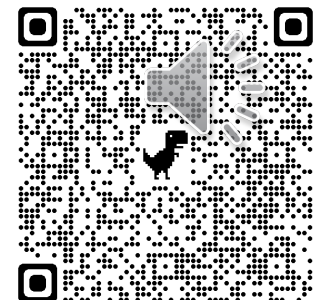


Mark Killgore
Member
Engagement Rep



Jazzlynn Garrett
Member
Engagement Rep

Contact Info by Chapter for
Chapter Ops & Membership Teams





PARTNERING WITH THE MEMBER ENGAGEMENT TEAM

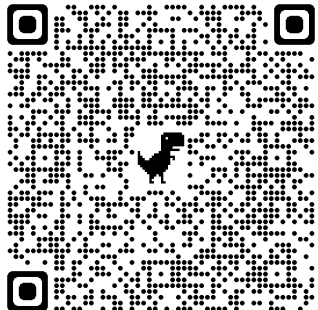
- **New Membership:** Follow-up with any potential new members that you have already connected with.
- **Membership Upgrades:** Follow-up with Essential members that are within your chapter area to upgrade to the Preferred member tier.
- **Profile Update:** If members provide you with new contact information, please forward it over to your MPI Member Representative to update with MPI Global.
- **Membership Renewals:** This includes all members who are currently due to renew.
- **Other:** Installment plans, membership transfers, unemployed members, student in transition, retired and Lifetime memberships.



REGIONAL ALIGNMENT



Region	Pacific US	Southwest US	Midwest US	Southeast US	Northeast US	Canada	LATAM	EMEA & APAC
Chapter Operations	Leslie Scantlebury	Leslie Scantlebury	Angela Layton	Angela Layton	Marcelo DeOliveira	Marcelo DeOliveira	Federico Toja	Federico Toja
Membership	Jazzlynn Garrett	Mark Killgore	Jazzlynn Garrett	Mark Killgore	Marlene Jackson	Teresa Saucedo	Marlene Jackson	Teresa Saucedo
Regional Council Chair/Vice Chair	MaryAnne Bobrow & Dana Marshall	Steven Foster & Paige Mejia	Bill Kubiack & Anthony Molino	Shannon Jones & Ricardo Hicks	Pam Kammerer & Wendy O'Duffy	Helene Moberg & Tim Whalen	Rick Magana & Flor Lopez	Thijs Peters & Sen Gunersel
	Northern California Oregon Sacramento/Sierra Nevada San Diego Southern California Washington State	Arizona Sunbelt Dallas/Fort Worth Houston Area New Mexico Oklahoma Rocky Mountain Texas Hill Country	Chicago Area Heartland Indiana Kansas City Michigan Minnesota Ohio Valley St. Louis Area Wisconsin	Carolinas Georgia Greater Orlando Gulf States Kentucky Bluegrass North Florida Potomac Tampa Bay Area Tennessee South Florida Virginia	Connecticut River Valley Greater New York Middle Pennsylvania New England New Jersey Philadelphia Area Pittsburgh Upstate New York	Atlantic Canada British Columbia Greater Calgary (Club) Greater Edmonton Montreal & Quebec Ottawa Toronto	Argentina (Club) Brazil (Club) Bajio Mexicano Club Caribe Mexicano Central America Club Colombia Ecuador (Club) Mexico Peru	Belgium Luxembourg France-Switzerland Germany (Club) Iberian Italia Japan The Netherlands Poland Scandinavia Turkey (Club) United Kingdom & Ireland



CLRP → Chapter Leader Training → Board Orientation → MPI Team Contacts



SURROUNDED BY SUPPORT



Equity, Diversity & Inclusion Committee Ambassadors

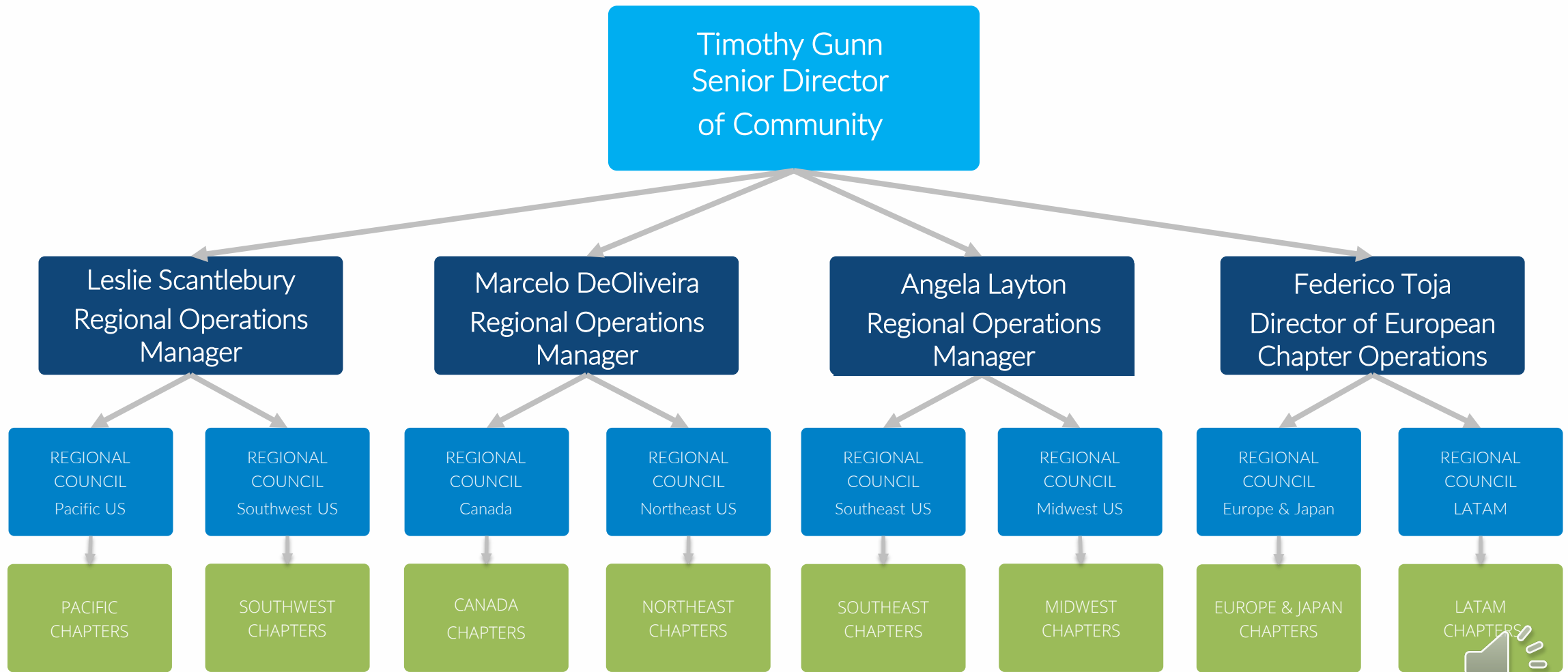
MPI Foundation Councils

Anti-Human Trafficking Committee

Regional Councils (8 regions)



REGIONAL COUNCIL STRUCTURE





Training



- **MPI Solution Rooms** foster active, meaningful connections between attendees, and provides peer-to-peer support and solutions to the challenges Volunteer Chapter Leaders are currently facing.
- **MPI Chapter Leader All Hands Calls** inform Volunteer Chapter Leaders with crucial information and updates about our organization.



- **Equity, Diversity & Inclusion (EDI)**
 - Coming in 2025
- **Volunteer Chapter Leader Training (New in 2025):**
 - Sitefinity (website management)
 - QuickBooks Online
- **MPI Communities for Each Department**
 - Presidents, Membership, Marketing, Finance, Education and Chapter Administrators



FY2025 TRAINING OVERVIEW



Date	Training
January 9, 2025	Solution Rooms
January 23, 2025	All-Hands Call: State of MPI – Kick Off New Term
February 4, 2025	Sitefinity Training #1
March 4, 2025	QuickBooks Online Training #1
March 13, 2025	Solution Rooms
April 24, 2025	All-Hands Call: Chapter Awards & Recognition
May 8, 2025	Solution Rooms
June 26, 2025	Sitefinity Training #2
July 7, 2025	QuickBooks Online Training #2
July 10, 2025	Solution Rooms
August 21, 2025	All-Hands Call
October 21, 2025	Sitefinity Training #3
November 19, 2025	All-Hands Call: Hello/Goodbye



CHAPTER LEADER NEWSLETTER



- Email sent to all Volunteer Chapter Leaders
- Second Thursday of each month
- Simplified & copy/paste content
- Easy access to archived past newsletters





FY2025 Compliance & Performance Metric Goals



December 1

Volunteer Leader Agreement: All Board members must complete Board 101 & Harassment Training prior to signing.

Strategic Business Plan, Budget, 18-month Chapter Calendar of Events, Chapter Operation form, MPI Chapter Bylaws, MPI Chapter Policy Manual

Paid Chapter Administrator (if applicable) evaluation, current contract for services, proof of license and insurance.

Regional Council Chapter Representative submitted

The Compliance Checklist can be found here: [CLRP > Compliance > December 1](#)



BUSINESS PLAN & CALENDAR TEMPLATES



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.

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

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2021-2022 MPI CHAPTER CALENDAR OF EVENTS

Refer to Membership Marketing Calendar in the CLRP

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June
MPI MARKETING (Outside)												
MPI GLOBAL EVENTS												
CHAPTER EDUCATION (Outside)												
Marketing Potential Location												
Education Event: Date/Location/Topic												
Networking Event: Date/Location												
IMEX America												
Education Event: Date/Location/Topic												
Chapter Fundraiser (outside)												
MPI EMEC												
Education Event: Date/Location/Topic												
Education Event: Date/Location/Topic												
MPI WEC												
Networking Event: Date/Location												
College Visit												
GMID												
Installation & Awards Gala (outside)												
Marketing												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Annual Performance Reviews												
Chapter Awards / Taxes due / Incentive Request form due												
Mid year retreats begin												
Mid year retreats												
Mid year retreats end												
Mid year performance reviews												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Board Meeting												
Incoming Board Slate due / New leader onboarding / Board 101												
Board Meeting												
CBS & Annual retreats begin												
Annual Retreats												
Annual Retreats end by June 15												
Board Meeting												

Notes to Consider for Customization by Chapter

- Chapters should add Venue, Dates, and Potential Topics when possible.
- Chapters can add a new section to customize it to their chapter. (Or remove any that don't pertain to them.)
- Each area should be a different color.

Throughout the year, this calendar should be updated at each board meeting. At Board Retreats, a new tab at the bottom should be added so the next term has its own sheet.

Chapters MUST use these templates found in the CLRP
CLRP > Compliance > December 1 Compliance
There is no required Budget template



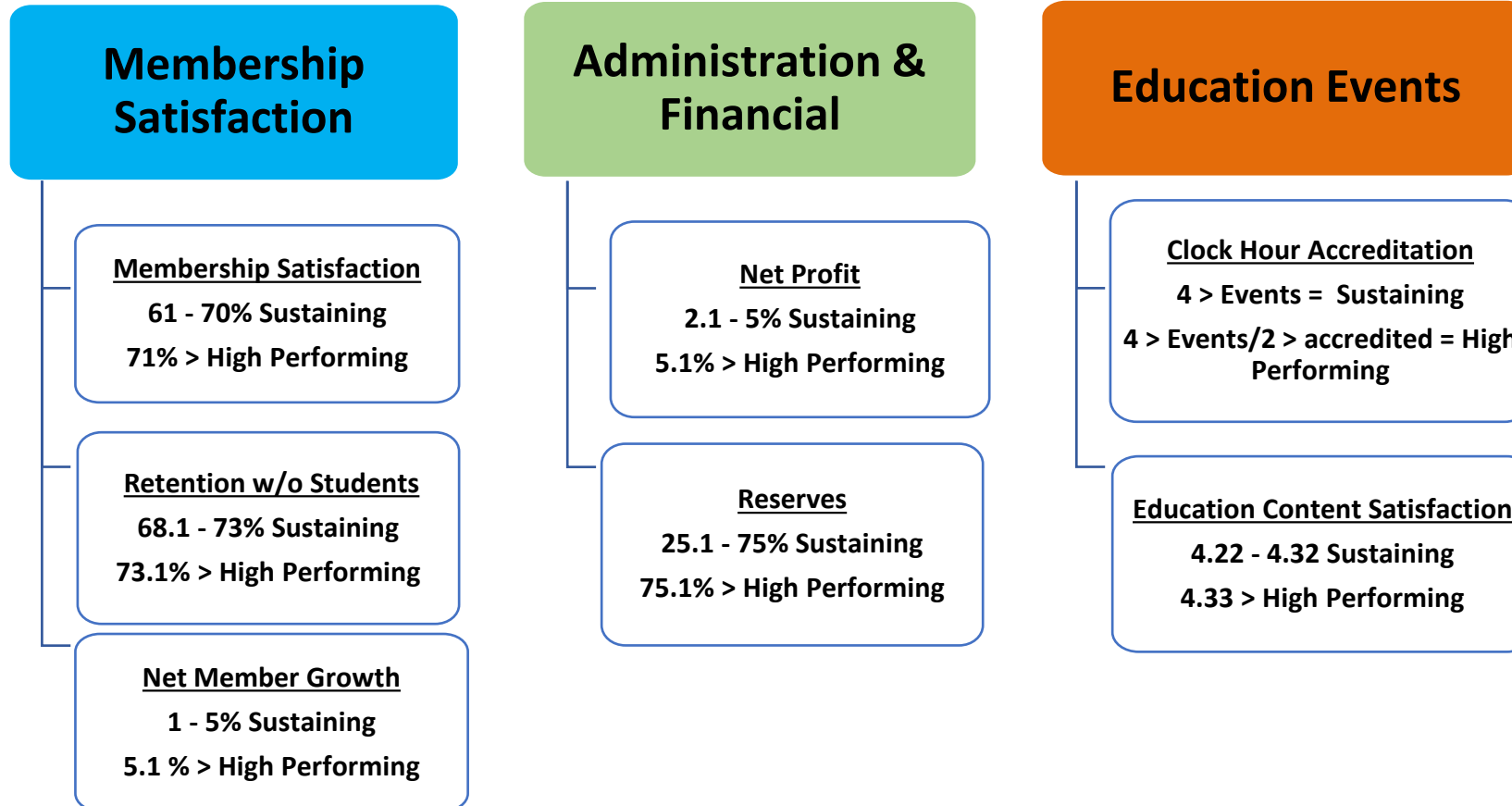
FY2025 IMPORTANT MPI EVENTS/DATES



Date	Event
January 1	Fiscal Year 2025 Begins
February TBA	European Meetings & Events Conference - Turkey (EMEC)
April 3	Global Meetings Industry Day (GMID)
April – June	Chapter Mid-Year Retreats (optional)
June 18 – 20	MPI World Education Congress - St. Louis (WEC)
June 28	FY2026 Chapter Board Slates Sent to Membership for Approval
August 1	FY2026 Chapter Board Slates Submitted to Global
September TBA	Chapter Leadership Summit (CLS)
September TBA	the EVENT (Canada)
September – November	Chapter Annual Retreats
September 10 – November 1	RISE Award Nominations are Open
October – November	RISE Awards Office Hours
December 10	RISE Award Applications are Due



FY2025 PERFORMANCE METRIC GOALS



- Annual requirement each fiscal year
- Options have been expanded to any initiative that supports Anti-Human Trafficking awareness
- Visit <https://www.mpi.org/tools/anti-human-trafficking> for ideas under the Chapter Education Toolkit section
 - Chapters are not restricted to the initiatives that appear on the website – creativity is encouraged
 - Chapters may not repeat an initiative that has been used in the past two years to fulfill the annual requirement
- Beginning in FY2025, each Chapter will report the fulfillment of the AHT Requirement on the Chapter Metric Dashboard.





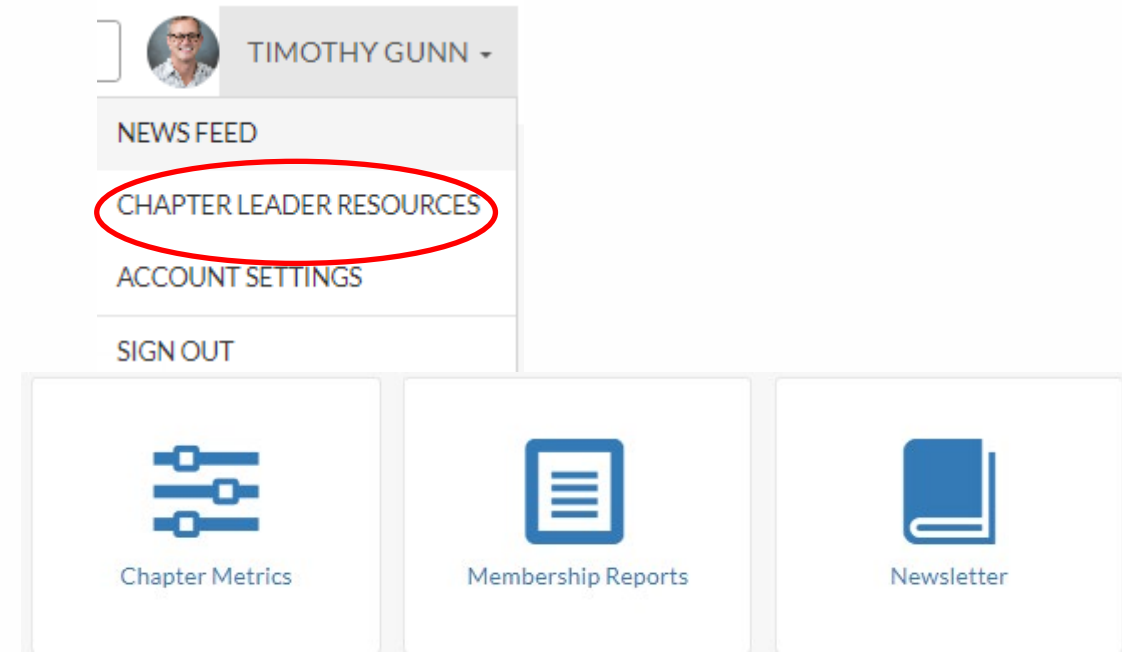
NEW BOARD MEMBERS



CHAPTER LEADER RESOURCE PAGE (CLRP)



- Log in to mpi.org
- Click on the drop-down menu by your name and select “Chapter Leader Resources”
- Buttons to run Membership and Chapter Metrics (Dashboard) Reports are at the top *(only let your Administrator or one designated leader enter dashboard data)*
- Role-Specific content areas are below so you can select the library and download what you need



Resources Available:

- Chapter Administrators
- Chapter Leader Training
- Chapter Toolkits
- Compliance
- Education
- Facilitator Program
- Finance
- Marketing & Communications
- Membership
- Office of the President
- RISE Up



ADMINISTRATION
Chapter Administrators
Partners of MPI Global and our chapters.



ADMINISTRATION
Chapter Leader Training
Resources to help you be successful.



ADMINISTRATION
Chapter Toolkits
Resources to help you stay in sync.



ADMINISTRATION
Compliance



ADMINISTRATION
Education
MPI education and best practices.



ADMINISTRATION
European Chapters
European business plans & metrics.



CHAPTER DASHBOARD REPORT



Log into mpi.org -> "Chapter Leader Resources"

Clock Hours

My Academy

Member Directory

Community

Jobs

Chapter Metrics

Membership Reports

Newsletter

Data is updated once every 24 hours

Monthly Statistics - FY 2022 - 2023														
	June Y/E	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
Total	448	439	447	445	446	457	473	464	469	475				460
New	141	7	23	7	7	13	28	6	8	17				231
Renew	266	22	15	19	24	25	36	25	29	36				95
Reinstate	6						1	2	1	1				5
Cancel	177	14	14	8	7	4	14	15	6	13				95
Chapter Transfer Out	22	4	3	2	1	1	3	1		2				17
Chapter Transfer In	14	2	1	1		3	1		3	2				13
Retention	64.92%	66.53%	67.51%	67.32%	69.54%	71.43%	74.06%	73.13%	73.86%	74.61%				74.61%
Retention_NonStudent	65.70%	67.52%	68.33%	68.16%	70.68%	72.23%	74.77%	73.76%	74.71%	75.45%				75.45%
Volunteer Engagement	101	94	105	101	102	101	104	114	10	0	0	0	0	91
Education Satisfaction			4.74			4.53			3.75					4.45
Education Survey Responses			19			38			12					69

Net Non-Student / Non-Trial Member Growth			
	FY 21 - 22	FY 22 - 23	
July	461	428	-2.28%
Aug	447	435	-0.68%
Sept	439	434	-0.91%
Oct	436	435	-0.68%
Nov	433	445	1.60%
Dec	435	460	5.02%
Jan	422	453	3.42%
Feb	433	458	4.57%
Mar	431	465	6.16%
Apr	436	0	-100.00%
May	439	0	-100.00%
June	438	0	-100.00%

Education / Accredited Education Offerings	
Incentive Key:	
YTD Actual	4
Accredited Events 4 / Cumulative Events 4	4
1 Point = 4 or more with 0 accredited	
2 Points = 4 or more with 2 or more accredited	

Educational Offering Content Satisfaction	
Incentive Key:	
YTD Actual	4.22
Accredited Events 4	4.33 or Higher
1 Point = 4.22 - 4.32	
2 Points = 4.33 or Higher	

Member Retention (Non-Student)	
Incentive Key:	
YTD Actual	65.11%
Accredited Events 4	71.1% or Higher
1 Point = 65.11% - 71.1%	
2 Points = 71.1% or Higher	

Member Satisfaction (Yearly Performance)			
	FY 21 - 22	FY 22 - 23	Incentive Key:
MPI Chapter Satisfaction Survey			
Satisfaction Rate:	65%	0%	1 Point = 51% - 54%
Satisfaction Response Rate:	17%	0%	2 Points = 55% or Higher
Satisfaction Response Count:	69	0	

* A minimum of 12% of membership respondents is recommended to achieve valuable, actionable data.

CHAPTER PERFORMANCE REVIEW



CHAPTER PERFORMANCE & METRICS SUMMARY REPORT



<INSERT CHAPTER NAME>

FY2025 Annual Performance & Metrics Summary Report

This Performance & Metrics Summary has been modified for Chapter Performance measurement and results are based on achievements for Fiscal Year 2025. Performance measurement has been simplified with focus on the (3) most critical areas for Chapter sustainability: Membership, Finance and Education.

Your Chapter Dashboard measures your Chapter's performance against MPI Chapter Bylaws and MPI Chapter Policy Manual for minimum Chapter performance standards to maintain your Chapter's charter as well as best operational practices for fiscal sustainability, operational health, and membership engagement. This summary provides a snapshot of Chapter performance highlighting the critical elements: Membership, Education and Finance, and identifies opportunities for action and growth.

Additionally, this summary tracks Metric Incentives earned based on performance. All Chapters will be recognized, and incentives awarded at the Annual Chapter Performance Awards which takes place in April.

MEMBERSHIP SATISFACTION & GROWTH	Objective	Target	Standards	Metrics	
	MEMBER SATISFACTION		Needs Improvement = 60% or lower		
			Sustaining / 1 Metric Incentive Point = 61 - 70%		
			High Performing / 2 Metric Incentive Points = 71% or higher		
MEMBER RETENTION WITHOUT STUDENTS		Needs Improvement = 68% or lower			
		Sustaining / 1 Metric Incentive Point = 68.1 - 73%			
		High Performing / 2 Metric Incentive Points = 73.1% or higher			
NET MEMBER GROWTH WITHOUT STUDENTS		Needs Improvement = 1% or lower			
		Sustaining / 1 Metric Incentive Point = 1.1 - 5%			
		High Performing / 2 Metric Incentive Points = 5.1% or higher			

EDUCATIONAL EVENTS	Objective	Target	Standards	Metrics	
	CONTENT SATISFACTION		Needs Improvement = 4.21 or lower		
			Sustaining / 1 Metric Incentive Point = 4.22 - 4.32		
			High Performing / 2 Metric Incentive Points = 4.33 or higher		
EDUCATIONAL/ACCREDITED EDUCATIONAL EVENTS		Needs Improvement = 3 or fewer events			
		Sustaining / 1 Metric Incentive Point = 4 or more educational events			
		High Performing / 2 Metric Incentive Points = 4 or more educational events, of which 2 or more are accredited			

FINANCE	Objective	Target	Standards	Metrics	
	NET PROFIT		Needs Improvement = 2% or lower		
			Sustaining / 1 Metric Incentive Point = 2.1 - 5%		
			High Performing / 2 Metric Incentive Points = 5.1% or higher		
RESERVES % OF FIXED ANNUAL OPERATING EXPENSES		Needs Improvement = 25% or lower			
		Sustaining / 1 Metric Incentive Point = 25.1 - 75%			
		High Performing / 2 Metric Incentive Points = 75.1% or higher			

TOTALS	Standards	Metrics
CHAPTER OF EXCELLENCE – Achieve “High Performing” status in 7 out of 7 focus areas.	HP -	
TOP PERFORMING CHAPTER – Achieve “High Performing” status in 6 out of 7 focus areas.	SUS -	
CHAPTER OF MERIT – Achieve highest performance over all Chapters in a specific focus area.	NI -	

METRICS INCENTIVE PLAN



The Performance & Metrics Summary Report will track Metric Incentives earned based on performance.

Maximum points available – 14 points

1 complimentary preferred level new membership or membership renewal for a planner or supplier. Renewal certificates may only be offered to members who have not yet renewed for the next calendar year	4 points each
1 complimentary registration for a 4-hour (select) MPI Academy Certificate Course (digital delivery only) for a Chapter Member	3 points each
20% off a membership renewal or new membership (discount certificates may only be offered to members who have not yet renewed for the next calendar year.)	1 point each



CHAPTER AWARDS RECOGNITION



CHAPTER OF EXCELLENCE



2024 CHAPTER AWARD

TOP PERFORMING



2024 CHAPTER AWARD

Categories tracked: Member Satisfaction, Member Retention, Net Member Growth, Net Profit, Reserves, Education Content Satisfaction, Accredited Educational events. Results are determined through chapter dashboard results and Chapter Performance & Metric summaries.

Chapter Merit Award: winners achieved highest performance over all chapters in a specific **focus area**.

Top Performing: winners achieved “High Performing” status with a minimum **6 out of 7 focus areas** of chapter management or membership satisfaction.

Chapter of Excellence: winners achieved “High Performing” status in **7 out of 7 focus areas** of chapter management and membership satisfaction.





When we **meet**, we change the world. SM

