

## 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 optional retreats are a great opportunity to revisit and update this plan so that you can finish the year strong.

### Glossary

Performance Standard or Metric – Key performance indicators for chapter success. In the Business Plan below, include the Performance Standard or Metric in the initial (gray shaded) row associated with Objectives.

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.

Objectives/Actions – Steps your chapter will take to achieve minimum performance standards or metric incentives. The first (gray shaded) row should reflect the Objective (or goal). Action items should be listed in the following (white) rows as supporting activities to reach the Objective.

- Objectives (gray shaded rows) – SMART Goals (specific, measurable, achievable, relevant, timely). They should tie directly to the mission, vision, performance standards and/or metrics. All chapter activities should align with the overall direction of the global organization. (see an example below)
- Action (white rows) – 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)	State of Completion
<b>Non-Student New Member Growth</b>	Objective 1 Achieve 5% Net Member Growth	Recruit XX Members by the end of term through targeted Membership programs and initiatives	VP Membership	Director of Member Care, Director of Member Recruitment	6/30/2022	0%
	Action: Develop and Activate Member Recruitment Committee with a total of (3) volunteers	<ul style="list-style-type: none"> <li>• Conduct (1) annual Member Recruitment Drive beginning Aug. 1</li> </ul>		Director of Member Recruitment	May 24	0%
	Action: Develop and Activate Member Care Committee with a total of (3) volunteers	<ul style="list-style-type: none"> <li>• Conduct (4) Master Your Membership &amp; Networking Events</li> </ul>		Director of Member Care	July 15 Oct. 23 Jan. 22 April 17	0%
	Action: Partner with Special Events on Volunteer Recognition Event In May prior to Gala	<ul style="list-style-type: none"> <li>• Produce Member VIP Recognition Event and award (4) chapter membership renewals</li> <li>• Award member recruitment prize</li> </ul>		Director of Member Care	May 24	0%

Owner – The main point person to manage the objectives/actions. Should be a position title and not a name.

Collaborators – Other departments or committees involved in achieving the objective or action.

Completion Date – The date the objective needs to be achieved.

State of Completion – The current percentage of the goal that has been achieved.

## Arizona Sunbelt Chapter

## 2023-2024 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 (eligible for metric incentive points) and should be considered minimum benchmarks. For a glossary of terms and instructions on using this business plan, refer to the guide on page 1.

Membership Satisfaction & Growth	Leadership & Engagement	Administration & Finance	Communication & Brand	Educational Events
Member Satisfaction: <i>61 – 70%</i>	Succession: Complete board slate due to MPI Global by <i>March 1</i>	Compliance: All documents filed with MPI Global by <i>June 15</i>	Community Presence: <i>Maintain current info on website and at least one social media outlet</i>	Educational Events: <i>4 educational events.</i>
Member Retention without Students: <i>68.1 - 73%</i>	Volunteer Engagement: <i>Maintain a healthy pipeline</i>	Governance: Update chapter bylaws & policy manuals by <i>June 15</i>	Brand Compliance: <i>Meet guidelines consistently &amp; in timely manner)</i>	Education Content Satisfaction: <i>4.22-4.32% survey score</i>
Net Member Growth: <i>0.1 -3%</i>	Global Trainings: Participation in mandated programs: <i>Chapter Leader Training, global calls etc.</i>	Net Profit: <i>0 - 1%</i>		
		Reserves as % of Fixed Annual Operating Expenses: <i>25.1-75%</i>		

### Membership:

Note: Membership goals should be reflective of growth, retention, engagement, satisfaction, etc.

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborators	Completion Date (no later than)	State of Completion
	<b>Objective 1</b> Host (5) Networking Events	Provide members the opportunity to attend networking events	VP, Membership Director, Membership	Other Committees/Positions involved	6/30/24	100%
	Action	Develop (3) Networking Events	VP, Membership Director, Membership			100%
	Action	(2) Post-Education Networking Events	VP, Membership Director, Membership	Education		100%
	<b>Objective 2</b> Create a survey targeting members that are within 1-3 years of joining MPI AZ	To gain feedback from new chapter members and identify what is working and where we can improve	VP, Membership Director, Membership		11/30/23	CXL  (included as part of chapter survey)
	Action	Create & distribute survey		Communications		
	Action	Award metric certificate to one respondent				
	<b>Objective 3</b> Maintain Member Satisfaction of 80% or above	Communicate member benefits, volunteer opportunities, networking & education events	VP, Membership Director, Membership Membership Team		12/31/24	0%

	<b>Objective 4</b> Hold a "Membership Month"	30-day membership drive to recruit & retain members	VP, Membership Director, Membership Membership Team	Communications	12/31/24	0%
	<b>Objective 5</b> Increase overall membership by 10%	Create a campaign of calls, emails, networking & word of mouth to grow new chapter membership	Membership Team	BOD	12/31/24	80%

**Education:**

Note: Education goals should be reflective of driving attendance, providing clock hours, meeting member’s content needs, etc., not a list of chapter events.

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborators	Completion Date (no later than)	State of Completion
	<b>Objective 1:</b> Source Quality Speakers for Education Programs	Allow speakers to bid on requests for speaker engagements at MPI Education programs	Director of Education		12/31/23	100%
	Action	Create digital/PDF Speaker RFP Form				
	<b>Objective 2:</b> Maintain Education Satisfaction Score of 4.5 or better	Continue to meet this standard and strive for improvement	VP & Director of Education		06/30/24	50%
	Action	Pivot based on member/participant feedback and suggestions and implement into education programs.			12/31/2024	50%
	<b>Objective 3:</b> Host at least one education program with industry professionals from outlying areas (i.e. Nevada, Utah, Idaho, Montana, Wyoming)	Open an education program to other states without an MPI chapter to bring in more networking opportunities and industry knowledge sharing	VP & Director of Education	Collaboration with Membership & Communication	06/30/24	100%
	Action	Engage with industry professionals in these areas	Update	Engaged with members of others chapters- in areas who did not have CMP-U		

				program (Michigan, Kansas, Pennsylvania)		
	<p><b>Objective 4:</b> Collaborate with other MPI Chapters and/or industry associations (i.e. HSMIA, AZSAE) on Education Programs</p>	<p>Opportunity to present Education with other chapters/associations in the industry and cross promote</p>	<p>VP &amp; Director of Education &amp; Membership</p>	<p>Collaboration with other MPI chapters (perhaps Colorado, Utah and maybe others within the Western Region) and/or other industry associations</p>	<p>06/30/24</p>	<p>100%</p>
	<p>Action</p>	<p>Reach out to the other MPI chapters and/or other associations to gauge interest level, review MPI Sunbelt Chapter survey results</p>	<p>Update: Held Joint MPI/HSMIA GMID 2024 Program</p>	<p>PCMA's new AI for event certificate course</p>		

## 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	Collaborators	Completion Date (no later than)	State of Completion
<b>Organize Content</b>	Activate Comms Calendar	Create a live content calendar	VP & Director of Comms	OTP/Education	10/1/2023	100%
	Action: Determine Platform	Find a live, online platform	VP & Director of Comms	Joanne	9/1/2023	100
	Action: Develop Timeline	Develop a timeline for 9-10 months based on the chapter calendar	Digital & Strategic Comms	OTP/Education/Global	10/1/2023	100
<b>Member Recognition</b>	Continue Member Recognition	Milestone and member spotlights	Strategic Comms	Membership	12/1/24	90%
	Establish Milestones (2x)	Recognize 5, 10, 15, 20 year members	Strategic Comms	Membership/Joanne	12/1/24	100%
	Create member spotlights	Use milestone members, create videos and posts	Digital Comms	Membership	12/1/24	90%
<b>YouTube/Video Content</b>	Revive YouTube Channel	Use existing and new video to draw traffic to YouTube	Digital Comms	VP & Director of Comms	8/31/23	100%
<b>Increase Sponsorships</b>	Create campaigns for online donation forms	Use existing jot forms for new campaigns	VP & Director of Comms	Finance	8/31/23	100%



	Create QR Codes	Use QR on web, slides and social to direct to Jot Forms	Digital Comms	Deb L.	8/31/23	100%
<b>Increase Engagement</b>	Industry Engagement	Use Zoho to interact with the industry			12/31/24	90%
	Engage with specific partners in the Industry	Follow industry partners, sponsors, and associations	Strategic Comms	Finance/Joanne	11/30/24	100%
	Monitor Engagement	Use Zoho to monitor and engage with other channels	Digital Comms		8/31/23	100%

**Finance:**

Note: Finance goals should be reflective of profit, managing expenses, sponsorship needs and reserves etc.

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborators	Completion Date (no later than)	State of Completion
	Objective 1	The what ...	Should be a position title, not a name	Other Committees/Positions involved	mm/dd/yy	0%
	Achieve Budgeted Fundraising/Revenue Goal	Online Raffle in 11/23	VP	Director of Strategic Alliances	11/28/23	100%
		Holiday Gala 12/23	Director of Special Events	Committee Chair / Director of Strategic Alliances	12/18/23	100%
		Adult Prom	Director of Special Events	VP / Director of Strategic Alliances	3/15/24	100%
		Golf Tournament w/ HSMAI	VP	Committee Chair / Director of Strategic Alliances	5/15/24	100%
		Drag Queen Bingo	VP / Director of Special Events	Director of Strategic Alliances	6/30/24	100%
	TBD - October Event?	On-Line Fundraiser - Trick or Treat Raffle	Director of Special Events	Committee Chair	10/31/24	100%
	Objective 2					
	Review and Update Bylaws with Regard to % of	Update Bylaws	VP	Past President	5/15/24	100%

	Funds Going to Investment Account					
	Objective 3					
	Create Succession Plan	Build Committees Now for Future BOD Positions	VP	President / President-Elect	12/31/24	In Progress

**Leadership:**

Note: Goals should be reflective of member/volunteer engagement growth, member/volunteer satisfaction, training and processes.

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborators	Completion Date (no later than)	State of Completion
	<b>OBJECTIVE 1</b> Increase Fundraising & Special Events Activities	Increase chapter budget capacity with targeted special events designed for fundraising	VP of Finance / Director of Special Events & Fundraisers	OTP	12/31/2024	100%
	<b>OBJECTIVE 2</b> Break even in 2023-2024 FY	Utilize aforementioned fundraising opportunities to increase budget capacity. Successful efforts will meet zero net loss goals.	Finance	OTP	12/31/2024	90%
	<b>OBJECTIVE 3</b> Determine long-term solution for electronic document/contract signature process	Currently we are utilizing a free service. This goal pertains to obtaining a more robust subscription (sponsored for year 1 & revisited for chapter support from budget allocation following year 1)	OTP	Finance	8/31/2023	100%
	<b>OBJECTIVE 4</b> 90% attendance at Board Meetings	Crucial for team cohesion and to ensure a quorum to vote on issues. To be tracked via roll worksheet	Executive Administrator & OTP	All Board of Directors	12/31/2024	75%
	<b>OBJECTIVE 5</b> Create and maintain a solid succession plan for each department	Establish a dynamic template for departments to track and update for ongoing succession	President & President Elect	Immediate Past President VP's of all departments	6/30/2024	100%

		planning. The purpose is to establish a long term development list of potential leaders for ongoing development and succession.				

**Other (As Needed By Chapter):**

Note: Customize this section to accommodate objectives or actions related to additional departments or committees not captured above: e.g., special events, leadership development, DE&I, community engagement, meet-up's, etc.

Performance Standard or Metric	Objectives/Actions	Description	Owner	Collaborators	Completion Date (no later than)	State of Completion
	Objective 1	The what ...	Should be a position title, not a name	Other Committees/Positions involved	mm/dd/yy	0%
	Action	The how ...				
	Objective 2					
	Objective 3					0%