

## 2011-2012 Chapter Business Plan

### Vision, Mission & Values Statements | Metrics | Tactics Plan

#### Vision Statement

Meeting Professionals International Rocky Mountain Chapter (MPIRMC) will build a rich regional meeting industry community.

#### Mission Statement

Meeting Professionals International Rocky Mountain Chapter will make our members successful by building human connections to:

**Knowledge and Ideas** – Create professional development pathways and resources that enable members to evolve their careers toward positions of strategic understanding and influence.

**Relationships** – Increase awareness and influence about the value of meetings with senior decision-making executives at corporations, associations and organizations.

**Marketplaces** – Identify trends and deliver innovative solutions to ensure MPIRMC is the premier regional marketplace for both suppliers and planners.

#### Values Statement

##### As a chapter we:

- Are member centric
- Lead with integrity
- Ensure transparency at all times
- Consistently encourage a visionary, relevant & unique approach

***MPIRMC is the premier authority for education and connections to advance our members and community***

#### MPI's 2011-2012 – Headquarters Strategic Imperatives

- **Evolve** to a global community
- **Re-Imagine** our business relationship with chapters
- **Elevate** the member conversation and experience
- **Build** a great organization

#### Executive summary

MPI Rocky Mountain Chapter, as the first recognized chapter of Meeting Professionals International has a long and storied history with a depth of resources to draw upon. As the largest industry association in the region, we are a high profile organization and must continue our efforts to strengthen and utilize our standing in the community for the benefit of our members. We are leading our community with a renewed focus on our membership, to include; improved education, unique networking and development of our marketplace. We have heard our member's responses/feedback and our goal is to deliver to their needs.

#### Current situation

##### Basic data

Name of Chapter : Meeting Professionals International Rocky Mountain Chapter (MPIRMC)  
Status : legally registered as a not-for-profit professional society  
Office : Rocky Mountain Event Consultants, LLC, Castle Pines North, Colorado, USA  
Head Office : MPI HQ, Dallas, Texas, USA

## Brief history of the Chapter and Current Status

The Meeting Professionals International Rocky Mountain Chapter (MPIRMC) officially weighed in November 13, 1973. As host to the Annual MPI meeting (now World Education Congress) in 1982 and 2004, MPIRMC is a highly visible chapter. MPIRMC has also been the home chapter for a number of MPI past presidents and chairwomen, including Rudy Wright CMP, Stephen D. Powell and Kitty Radcliffe and currently has two MPI lifetime members. Additionally, one of our founding officers, Dick Hildreth, was dean of the first 4-year degreed meeting administration program in North America at Metro State.

MPIRMC was a founding organization of the Meetings Industry Council of Colorado (MIC), one of the first chapters in the country. MIC is a gathering of local leaders representing each of the Colorado meetings associations that came together, initially, to coordinate meeting calendars to ensure there would be no overlap of important meeting dates. The original concept was built on and grew into a consortium of meeting partners who regularly get together to talk about what is best for the industry, how we can best serve each other, and how we can create a meetings environment that will encourage meetings and events to come to Colorado.

In the past, our chapter has been honored as MPI's Chapter of the Year. We are proactively working to exceed our past levels of achievement and provide our members the benefits they seek and need, while remaining the regional leader of industry associations.

We are subject to Headquarters policy and funding changes.

## Resources

Our Chapter resources consist of funding, time & talent of our volunteers and MPI resources.

Funding: Our chapter has a total of \$116,000 in anticipated revenues to fund chapter activities this year (See appendix A for the budget).

Time & talent: Our chapter has an experienced board of directors that are dedicated to rolling out the 2011-2012 tactical plans. Together with our estimated one hundred forty (140) active volunteers, who devote countless hours per week to our Chapter, we are actively looking to engage additional members to become volunteers in order to best support our Chapter's goals.

In addition to our volunteer base, we have the talent of our chapter business manager who reports directly into Meeting Professionals International (MPI) HQ, located in Dallas, and our current association management company Rocky Mountain Event Consultants, LLC.

MPI Resources: Our chapter will make full use of the tools and assistance provided by Headquarters and within our Chapter, especially:

<u>Headquarters</u>	<u>Chapter</u>
Chapter Business Summit	Online Directory
Chapter Logos/Marketing Templates	Past Presidents
Chapter Online Resources/Toolkits	Educational Series
Culture Active Tool	Processes and Procedures
GroupSpace	Leadership Council
Industry Calendar	Chapter Business Managers
MPI Foundation Grants	Needs Assessment
Skills Assessment	Leveraging Partnerships
Chapter Content Database	DropBox
Chapter Leadership Training	Leadership Skills Series
Webinars	Other Chapters
Industry Research	Sponsorships and Donations
Chapter Business Managers	Chapter Website

Meetings Industry Council of Colorado (MIC): As a member of this coalition of thirteen local professional meetings industry-related organizations, our engagement allows for participation in the annual conference and benefits therein, participation in the Serving Up Hope networking and charity lunch, as well as usage of the MIC membership list for periodic e-blast marketing.

Monitoring and Evaluation Tools: To ensure that we accomplish our plans and remain committed to our objectives, we will:

- Monitor our progress against the new chapter business metrics on a monthly basis and make adjustments as needed
- Review our business plan, team status reports, metrics and budget at each board meeting to ensure progress against our objectives and action items
- Conduct post event surveys/evaluations of our education programs to ensure continued and improved satisfaction from attendees and make adjustments as needed.
- Perform a chapter needs assessment on an annual basis
- Conduct focus groups for input from members on new and existing programs

## **Products and services**

### **Educational & Networking Opportunities**

- Eight (8) monthly educational programs
- One (1) MIC Annual Meeting
- Quarterly Networking events (MPI After 5)
- Quarterly New Member receptions (complimentary)
- Quarterly Membership Orientation sessions (complimentary)
- Quarterly Planner Collaboration Events (complimentary, planner only)
- Monthly (12) Community Service activities
- Three (3) Leadership Skills Series Programs (complimentary)
- One (1) Auction fundraiser
- One (1) Student Educational Program (Backpack 2 Briefcases)
- Student Opportunities
- Volunteer opportunities for individual development and growth
- One (1) Annual Awards Gala
- MPI Road Show (Regional)
- MPI/PCMA Golf Tournament
- MPI On Tour (Students)

### **Human Connections**

- Website
- Social Networking: LinkedIn Group Discussions (and subgroups), Facebook, Twitter
- Weekly/bi-weekly e-blasts
- Bi-Monthly Newsletters
- Annual On-line Membership Directory

### **Business Development**

- Sponsorship and Advertising Opportunities
- Advertising Opportunities
- Online Membership Directory with enhanced listings
- Table top vendor opportunities at programs
- Chapter website interactivity
- Affiliate Membership

### **Rewards and Recognition**

- Professional Recognition for Chapter Achievements
- Annual Volunteer Recognition at our Gala
- Member of the Quarter
- Member Spotlight

- Anniversaries and New Members
- Praise Awards

## Operating Environment/Market Analyses

### The Industry

Social	Technology
<ul style="list-style-type: none"> <li>• Trend in life and work balance affecting volunteerism</li> <li>• Trend in people expecting more with less resources to rely on</li> <li>• Trend of differences in generational approach including student involvement</li> <li>• Trend of Globalization</li> <li>• Trend of technology replacing face-to-face social interaction</li> <li>• Trend of increased industry related media awareness</li> </ul>	<ul style="list-style-type: none"> <li>• Trend in the increase of virtual meetings</li> <li>• Trend in webinars</li> <li>• Trend in the increase of need for speed of communications</li> <li>• Trend of the increased need of connectivity</li> <li>• Trend of more digital data collection</li> <li>• Trend in members utilizing more meetings-based software</li> <li>• Trend in the cost of technology decreasing</li> <li>• Bigger adoption rate of social media tools</li> </ul>
Economic	Political
<ul style="list-style-type: none"> <li>• Trend of procurement taking a more important role in the meetings industry</li> <li>• Trend of corporate social responsibility and green meetings</li> <li>• Trend of an increase of awareness of the impact of weather conditions</li> <li>• High number of natural and manmade disasters this calendar year</li> <li>• Trend of an increase in cost of food &amp; beverage</li> <li>• Trend of an increased cost of security</li> <li>• Trend of supplier market</li> </ul>	<ul style="list-style-type: none"> <li>• Trend in increased concessions given to real estate developers</li> <li>• Trend in the decrease of city provided services</li> <li>• Trend in the standardization in industry practices</li> <li>• Trend toward politicians increasing government regulations</li> </ul>

### The Local Industry

Our chapter is affected by the current economic climate. There are indications that Visit Denver is recovering from the most recent recession, with this comes a world of short term business. We anticipate that this recovery will continue to be slow which has an impact on our ability to obtain sponsorship, advertising, and engage new members whose companies may not support their activity in MPIRMC.

## Market Analyses

### Competitor Analyses

Competition	How They Compete			Collaboration Possible?			
	Education	Membership	Volunteers	Networking	Membership Dues	Sponsorship	
CSAE	Monthly	250	Yes	Yes	\$280 professional \$310 associate	Yes	Yes
RMPCMA	Bi-monthly	300	Yes	Yes	\$360 planner \$485 supplier	Yes	Yes
ISES	Monthly		Yes	Yes	\$399 professional \$299 nonprofit	Yes	Yes
RMBTA	Monthly		Yes	Yes	\$125	Yes	Yes
NACE	Monthly	151	Yes	Yes	\$395	Yes	Yes
HSMAI	Monthly		Yes	Yes	\$365 planner \$395 supplier	Yes	Yes

## Competitive Advantages

MPIRMC continues to be the meetings industry leader for membership in our geographical region. We provide significantly more contact points for our membership.

## Risk Analysis

### SWOT Analysis– Strengths, Weaknesses, Opportunities and Threats

*(Strengths - successful processes, weaknesses - challenges faced, opportunities - recommendations from previous experiences, threats - action items/ pending issues).*

#### Strengths:

1. Solid/engaged leadership
2. Our current plan is well formulated and supported by the incoming board
3. Experienced board of directors and emphasis on leadership training supports succession planning
4. Solid schedule of events generated by member input
5. Committed volunteer base

#### Weaknesses:

1. New sponsorship programs do not yet have traction
2. Finances are highly dependent on HQ rebate funding
3. We are just rolling out a new website and adoption issues can arise
4. Adherence, reevaluation and adjustment of budget by the board of directors
5. Expansive geographic region of our chapter inhibits attendance at programs

#### Opportunities:

1. Ability to leverage the new website for additional sponsorship and advertising dollars
2. Reimagining our sponsorship benefits to better attract dollars and in-kind.
3. Leveraging the strength of our current membership base to increase new member enrollment
4. Leveraging our faculty advocates for increased student engagement and membership

#### Threats:

1. Global economy continues to stabilize
2. Reductions in employer support of volunteerism
3. Reductions in employer support for increasing membership dues
4. Economic conditions inhibiting in-kind sponsorship and cash donations

## Metrics

### Metric 1 Net Member Growth

Increase Net Member Growth 0% by June 30, 2012 (based on data as of the 2011 year end)

### Metric 2 Membership Satisfaction

Increase on annual member care survey (conducted by MPI HQ) results

Goal: Achieve an 8.30 membership satisfaction rating from the 2012 MPI International Survey to be distributed by MPI HQ around March 2012.

### Metric 3 Engagement/Participation

5 % Increase in web traffic between July 1, 2011 and June 30, 2012

3 % Increase Attendance (from 164) at regional educational event

2 % Increase Average Attendance (from 102) at educational events

### Metric 4 Chapter Financial Management

\$ 720.50 Chapter budget range +/- 5%

0 % Increase in revenue per member

## Tactic Plan

In this area, the Board of Directors developed the tactical plan for the chapter that will guide activities throughout the year. Keeping previous fiscal years' performance data in mind; leadership developed measurable objectives to ensure they meet and/or exceed the chapter business metrics. Deadlines were determined, financial resources allocated and ownership identified (for accountability) to ensure 100% accomplishment of each objective.

<b>Metric 1. Net Member Growth</b>							
Objectives/Actions	Position	Budgeted Expense	Actual Expense	Budgeted Revenue	Actual Revenue	% Complete	Completion Date
<b>Objective: Ensure a net member growth of 0% to MEET and 2% to EXCEED</b>							
<b>Tactic 1: Increase Membership Retention</b>							
A1.1 Execute Membership Concierge Program at 8 programs	Director of Member Care	\$0		\$0			6/30/12
A1.2 Execute a minimum of 3 new member events during networking events	Director of Member Care	\$100		\$0			6/30/12
A1.3 Execute Member Spotlight Program in newsletter	Director of Member Care	\$0		\$0			6/30/12
A1.4 Conduct 3 quarterly Member Orientations	Director of Recruitment	\$0		\$0			6/30/12
A1.5 Execute standardized Retention Process	Director of Recruitment	\$0		\$0			6/30/12
A1.6 Conduct 2 MPI Road Shows	Director of Recruitment	\$800		\$0			6/30/12
A1.7 Conduct 1 Member Needs Assessment	President Elect	\$0		\$0			1/31/12
<b>Tactic 2: Increase Student Membership</b>							
A2.1 Support One Student Club	Director of Recruitment	\$0		\$0			6/30/12
A2.2 Host Backpack 2 Briefcases for 25 students	Director of Recruitment	\$500		\$450			4/30/12
A2.3 Produce MPI On Tour	Director of Recruitment	\$0		\$0			6/30/12
<b>Tactic 3: Increase New Membership</b>							
A3.1 Maintain a New Member Recruitment Programs to recruit a minimum of 10 new members	Director of Recruitment	\$0		\$0			6/30/12
A3.2 Execute standardized Recruitment Process	Director of Recruitment	\$0		\$0			6/30/12
A3.3 Promote Affiliate to Member Conversion	Director of Recruitment	\$0		\$0			6/30/12

<b>Metric 2. Member Satisfaction</b>							
Objectives/Actions	Position	Budgeted Expense	Actual Expense	Budgeted Revenue	Actual Revenue	% Complete	Completion Date
<b>Objective: Receive on Chapter Satisfaction Survey a score of 8.30 MEET / 8.35 EXCEED</b>							
<b>Tactic 1: Increase Community Engagement</b>							
A1.1 Execute monthly Table Host program	Director of Member Care	\$25		\$0			5/30/12

<b>A1.2</b> Support a Book Club	Director of Education	\$800		\$0			6/30/12
<b>A1.3</b> Conduct a minimum of 2 Planner Collaboration Events	VP of Education	\$0		\$0			6/30/12
<b>A1.4</b> Produce 4 networking events (ICW 3 new member quarterly events) – based on 32ppl	Director of Special Events	\$400.00		\$1,200			6/30/12
<b>A1.5</b> Produce & distribute 6 newsletters	Director of Publications	\$1,252		\$1,800			6/30/12
<b>A1.6</b> Produce Email Blasts	Director of Publications	\$0		\$6,000			6/30/12
<b>A1.7</b> Support Social Media Promotions	Director of Marketing	\$0		\$0			6/30/12
<b>A1.8</b> Support Community Service Activities Monthly	Director of Marketing	\$0		\$0			6/30/12
<b>A1.9</b> Produce Chapter Ads for External Publications	Director of Marketing	\$0		\$0			6/30/12
<b>A1.10</b> Support Serving Up Hope Initiative	President	\$350		\$0			11/15/11
<b>Tactic 2: Increase Marketplace Opportunities</b>							
<b>A2.1</b> Support the online directory and promote advanced listings.	Director Publications	\$0		\$600			1/31/12
<b>A2.2</b> Promote Buy MPI Program	Director of Marketing	\$0		\$0			6/30/12
<b>Tactic 3: Increase Volunteer Engagement</b>							
<b>A3.1</b> Execute Volunteer Board - "Help Wanted" Program	Director of Leadership Development	\$0		\$0			6/30/12
<b>A3.2</b> Produce annual committee member recognition	Director of Leadership Development	\$100		\$0			6/30/12
<b>A3.3</b> Execute volunteer solicitation and tracking program	Director of Leadership Development	\$0		\$0			6/30/12
<b>A3.4</b> Execute Annual Awards Recognition Program	VP of Membership	\$2,000		\$0			6/30/12
<b>A3.5</b> Execute PRAISE Program	Director of Member Care	\$1,600		\$0			6/30/12
<b>Tactic 4: Increase Leadership Engagement</b>							
<b>A4.1</b> Send a minimum of 3 chapter leaders to Chapter Business Summit	President-Elect	\$350		\$0			6/30/12
<b>A4.2</b> Plan & execute 2 leadership retreats	President-Elect	\$9,000		\$0			6/30/12
<b>A4.3</b> Execute a minimum of 3 leadership development skills training programs	Director of Leadership Development	\$0		\$0			6/30/12
<b>A4.4</b> Execute member of the quarter program	Director of Leadership Development	\$150		\$0			6/30/12
<b>A4.5</b> Execute mid-year committee chair review	Director of Leadership Development	\$0		\$0			6/30/12
<b>A4.6</b> Conduct nominations process for 2012-2013 Board of Directors	IPP	\$0		\$0			3/30/12
<b>A4.7</b> Conduct mid year board assessment & exit interviews	IPP	\$0		\$0			6/30/12

<b>Metric 3. Engagement/Participation (Attendance) (MIC) (Website)</b>							
<b>Objectives/Actions</b>	<b>Position</b>	<b>Budgeted Expense</b>	<b>Actual Expense</b>	<b>Budgeted Revenue</b>	<b>Actual Revenue</b>	<b>% Complete</b>	<b>Completion Date</b>
<b>Objective 1: Increase Member Attendance at Educational Programs 2% MEET and 4% EXCEED</b>							
<b>A1.1</b> Coordinate logistics for 8 monthly educational programs	Director of Monthly Programs	\$8,400		\$31,740			5/31/12
<b>A1.2</b> Produce & execute for 8 educational programs ( <i>content &amp; speakers</i> )	Director of Education	\$12,829		\$7,783.50			5/31/12
<b>A1.3</b> Develop and integrate a marketing strategy for monthly programs	Director of Marketing and VP of Education	\$0		\$0			9/1/11
<b>Objective 2: Increase Member Attendance at Regional Program (MIC) 3% MEET and 6% EXCEED</b>							
<b>A2.1</b> Produce MIC educational breakout program	Director of Education	\$0		\$0			3/31/12
<b>A2.2</b> Develop and integrate a marketing strategy for MIC attendance	VP of Communication	\$0		\$0			3/31/12
<b>A2.3</b> Participate in MIC tradeshow	Director of Recruitment	\$150		\$7,000			3/30/12
<b>A2.4</b> Participate in MIC council meetings	IPP	\$0		\$0			6/30/12
<b>Objective 3: Increase Website Traffic 5% MEET 10% EXCEED</b>							
<b>A3.1</b> Update chapter website	Director of Publications	\$0		\$0			6/30/12
<b>A3.2</b> Publish weekly chapter email blasts with all links leading to website	Director of Publications	\$0		\$0			6/30/12
<b>A3.3</b> Promote launch of new website	VP of Communications	\$0		\$0			9/30/11

<b>4. Chapter Financial Management</b>							
<b>Objectives/Actions</b>	<b>Position</b>	<b>Budgeted Expense</b>	<b>Actual Expense</b>	<b>Budgeted Revenue</b>	<b>Actual Revenue</b>	<b>% Complete</b>	<b>Completion Date</b>
<b>Objective: Maintain 0% or higher gross margin with minimum of 5% educational spend ratio</b>							
<b>Tactic 1: Increase revenues from special events.</b>							
<b>A1.1</b> Coordinate & execute annual auction	Director of Fundraising	\$2,800		\$15,000			12/1/11
<b>A1.2</b> Coordinate & execute annual activity/golf tournament with industry partners	Director of Fundraising	\$325		\$7,000			6/30/12
<b>A1.3</b> Produce annual awards gala	Director of Special Events	\$4,600		\$7,000			6/30/12
<b>Tactic 2: Increase revenues from sponsorships, advertising and other sources.</b>							
<b>A2.1</b> Update & execute strategic alliance program	Director of Strategic Alliance	\$0		\$1,500			6/30/12
<b>A2.2</b> Generate revenue from the email blast, newsletter, online directory and website	VP of Communication	\$6,292		\$13,295			6/30/12
<b>A2.3</b> Promote affiliate member	VP of	\$0		\$750			6/30/12

program to gain 10 new affiliate members	Membership						
<b>Tactic 3: Adhere to standard finance practices.</b>							
<b>A3.1</b> Conduct monthly finances review at board meetings	VP of Finance	\$0		\$0			6/30/12
<b>A3.2</b> Conduct annual chapter audit	VP of Finance	\$1,960		\$0			10/1/11
<b>A3.3</b> Review Bank Statements and Accounts Monthly	VP of Finance	\$0		\$0			6/30/12
<b>A3.4</b> Review of Check Requests and Financial Procedures	VP of Finance	\$0		\$0			6/30/12