



## Business Plan 2011-2012

June, 2011

### Vision

Build a rich global meeting industry community

### Mission

Make our members successful by building connections to:

- Knowledge/Ideas
- Relationships
- Marketplaces

### MPI's 2010-2011 - Strategic Imperatives

**Build** a Great Organization - Create a remarkable culture and structure

**Evolve** from Association to Global Community - Deploy programs, knowledge platforms and brand architecture to align with vision

**Reinvent** Business Relationship with Chapters - Invest in chapters to create channel partnerships around community results

**Elevate** the Member Conversation and Experience - Elevate programs and services to a higher level of experience and business return

### Chapter Business Metrics

1. Net Member Growth
  - Percentage growth year-over-year
2. Membership Satisfaction
  - Percentage increase on annual member care survey (conducted by MPI HQ) results
  - Percentage completion
  - Percentage increase on chapter member needs assessment (not numerically calculated)
3. Engagement/Participation
  - Increase in chapter program participation
  - Increase in web traffic
  - Increase in number of volunteers
4. Chapter Financial Management
  - Adhere to chapter budget +/- 5%
  - Annual Revenue Growth

$$\text{Revenue Growth} = \frac{\text{Chapter Revenue} - \text{MPI Rebates} - \text{Grants}}{\text{Year-End Membership}}$$

## Executive summary

*The executive summary isn't an introduction. Ideally it should capture all the pertinent points of the plan in paragraph format. Please write your executive summary in this area once you have completed the business plan objectives. Please include the main areas that the chapter will be focusing on in the upcoming year.*

## Current situation

### Basic data

Name of Chapter : Meeting Professionals International (MPI) Sacramento Sierra Nevada  
Status : 501 3 c  
Office : P.O. Box 2338, Rocklin, CA 95677  
Head Office : MPI Headquarters, Dallas, Texas, USA

### Brief history of the Chapter and Current Status

The MPI Sacramento Chapter was chartered in 1985. In 1985, a small group of meeting planners began the chapter to assist local planners with education and networking. In 2005 we changed the name to include the Sierra Nevada region of Nevada where many of our supplier members were. Growth has been steady over the years to hovering under 250 members. With the current economic conditions the chapter has been working towards improving the value of the membership as well as offering less costly ways to interact.

## Resources

*This is where you should identify the resources that your chapter has (in the bank, in volunteer time, in MPI resources) to fund the activities that you are planning for the coming year. Running an association requires a commitment of time, energy and willingness to work together with a common purpose and view. Therefore this area is also dedicated to list the time & talent available in the chapter.*

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

Funding: Our chapter has a total of \$83,287 in resources and expects to spend \$121,850 to fund chapter activities this year (See appendix \_\_ for the budget).

Time & talent: Our chapter has over 50 volunteers, who, in total, can devote 150 hours per week to our Chapter. Next to the volunteers we have additional talent in our chapter that we can utilize, by engaging other members in committee activities. In this way we will be able to have 200 hours per week devoted to our Chapter in addition to the above mentioned number of hours.

MPI Resources: Our chapter will make full use of the tools and assistance provided by headquarters, especially:

Articles for *The Meetings Professional*, send copy of all press releases to International for *Community Net News*, speaking at WEC or MeetDifferent, membership reports and CBM (chapter business manager).

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 quarterly basis
- Review our business plan at each board meeting to ensure progress against our objectives and action items

- Review our budget at each board meeting
- Do an evaluation of our education programs and ensure that we have a 4.5 score on a 6 point scale (the 6 point scale is used for Platinum programs and we use it for all programs.
- Perform a chapter needs assessment on an annual basis

## Products and services

Website with membership directory, news articles, chapter news, job posting

Educational events

Annual Trade Show

Printed directory

Quarterly *Connects* Newsletter

Leadership Training

Brown bag education events

Networking events.

Golf tournament (networking)

Silent auction (marketing opportunity)

Mentor Program

CMP Study Group

## Operating Environment/Market Analyses

### The Industry (Economy, Trends)

Our chapter is particularly affected by:

### The Local Industry

Many associations are cutting back on costs – including membership and education for their employees because their own membership and other funding has declined.

The local economy is down due to statewide and nationwide recession

Local supplier members have less marketing dollars to assist our chapter with in-kind donations.

Lack of member resources toward involvement (\$ and time)

Decreasing attendance at monthly events (planners, inactive members)

Our chapter is particularly affected by:

### Market Analyses

Most of our planner members are Association employees or independent planners. We would like to increase the number of corporate planners.

### Competitor Analyses

CalSAE – We partner with this group during the Seasonal Spectacular and cross market events
SGMP - Some supplier members are members of both whereas few planners are members of both. Most of our chapter's planner members are association and corporate members. SGMP does not offer a CMP preparation program and MPI has filled a need with this area in the hopes we could convert a few new members. Membership dues are a challenge, though.
NCCMPI - This bigger nearby chapter has been mostly focused on the Bay Area. We are trying to do more cross marketing and perhaps will do a joint event someday
Seminar Companies – More and more private companies are doing meeting planning education session especially sponsored by industry partners (computer software, hotel, lawyers). These events are usually fully sponsored and do not cost the attendee anything.
Universities – CSUS offers a meeting planning education certificate. Some of our members teach at the school and our members receive reduced fees and can join MPI as a student member.
Other professional organizations (chambers, etc.)
IMPs – Small grassroots group made up of mostly special events planners
ASAE (No. Ca. Chapter) – Not much effect.

## **Competitive Advantages**

As a chapter we value:

- Reputation
  - Forging Powerful Partnerships
  - Delivering invaluable resources
- Professional Development
  - Surprise and delight and exceed expectation
- Fun
  - Dancing on Table – Excitement or Energy
- Quality
  - Flawlessly execute events/programs

These values are the core of our chapter and we would like to spread this reputation to others in our area. These give us the advantage over like groups if executed correctly. We are striving for that this year.

## Business Plan

*In this area all Board members will work on the broad plan for the chapter that will guide the activities throughout the year. Keeping all previous market information in mind, please develop your measurable objectives to ensure that you will meet and/or exceed the chapter business metrics. After that decide when the deadline is, if you need any money to accomplish the objective and who the owner is for each objective (who will drive this and make sure that it gets completed).*

### Metric 1 Net Member Growth

\_\_\_\_\_ % Net Member Growth

Objective	Lead	Budget	Completion Date	% Completion
1.1 bring 1 non-member to each event	Each BOD	\$0	June 2012	
1.2 obtain 10 new corporate planner members	Membership recruitment	\$0	June 2012	
1.3		\$0		

### Metric 2 Increase Volunteer Involvement

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

\_\_\_\_\_ % Completion

\_\_\_\_\_ % Increase on chapter member needs assessment

Objective	Lead	Budget	Completion Date	% Completion
2.1 Create a process to recruit & retain volunteers	PE	\$0	Sept 2011	
2.2 establish & implement a recognition program for all volunteers	PE/P	\$0	Sept 2011	
2.3				

### Metric 3 Engagement/Participation

\_\_\_\_\_ % Increase in chapter program participation

\_\_\_\_\_ % Increase in web traffic

\_\_\_\_\_ % Increase in number of volunteers

\_\_\_\_\_ % Etc.

Objective	Lead	Budget	Completion Date	% Completion
3.1 call and invite non-active members to each event	Membership			
3.2 poll members	President			

to find out why they joined <i>and</i> what keeps them				
3.3 Create matches in the Mentor Program	Membership			

## Metric 4 Chapter Financial Management

\$ \_\_\_\_\_ Chapter budget range +/- 5%  
 \_\_\_\_\_ % Increase in revenue per member

Objective	Lead	Budget	Completion Date	% Completion
4.1 Submit balanced budget	President	\$0	7/01/2011	0%
4.2 Monitor each event – special or educational - for budget goal attainment	VP Finance VPSpecialEvents VP Education	\$1,000 Fete	8/02/2011	0%
		\$15,000 Annual	11/15/2011	0%
		\$14,800 Trade Show	3/15/2011	0%
		\$16,000 Golf	5/30/2011	0%
		\$8,000 Workshops	Ongoing	0%
		\$\$16,200 Educational Programs	Ongoing	0%
4.3 Chapter audit completion	Audit Chair VP Finance	\$0	9/30/2011	0%
4.4 Secure succession plan for Audit Chair	Audit Chair	\$0	8/31/2012	0%
4.5 Update Audit Chair P&P Responsibilities	Audit Chair	\$0	12/31/2011	0%
4.6 Recruit three committee members, one of which to succeed as Audit Chair	Audit Chair President Elect	\$0	8/31/2011	0%
4.7 Secure succession plan for Strategic Alliance Chair	Strategic Alliance Chair	\$0	8/31/2011	0%
4.8 Recruit three committee members, one of which may succeed as	Strategic Alliance Chair President Elect	\$0	8/31/2011	\$0

Strategic Alliance Chair				
4.9 Update Strategic Alliance Chair P&P responsibilities	Strategic Alliance Chair	\$0	12/31/2011	\$0
4.10 Review sponsor packages for monthly programs, advertising, and general support of Chapter	VP Finance Strategic Alliance Chair Ads Chair VP Communications	\$0	9/30/2011	\$0
4.11 Secure sponsorship monies for monthly programs / key partners program	Strategic Alliance Chair	\$13,000	6/30/2011	\$0
4.12 Annual calendar of sponsors updated monthly for distribution with TSR	Strategic Alliance Chair	\$0	Ongoing	\$0
4.13 Monitor overall budget of Chapter	VP Finance President	\$0	Ongoing	\$0
4.14 Oversee preparation of Federal & State Income Tax Returns	VP Finance Chapter Accountant	\$0	October 1, 2011	\$0
4.15 1099 preparation in a timely manner	VP Finance Chapter Accountant	\$0	January 31, 2011	\$0

## Action Plan

*In this area, all Board and Committee members will work on their specific areas to create an action plan which will guide their activities throughout the year. These action items should tie into the above objectives to ensure that you are contributing to the overall goal of the chapter.*

### Membership Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1 Meet with Committee Chairs review P&P (VP Membership)	VP Membership			
1.2 Publicize MPI HQ Membership Options	Member Recruitment			
1.3 Develop a corporate member recruitment program	Member Recruitment			
1.4 Promote "advertisement" options via website, newsletter and directory	Member Recruitment			
1.5 Obtain member testimonials from luncheons & events (member retention)	Member retention			
1.6 Develop a recruitment tool for all chair and board members to use (member recruitment)	Member recruitment			
1.7 Coordinate member events with education program -dates/locations	VP Membership			
1.8 Create a student recruitment program	member recruitment			
1.9 Develop an ambassador program	Member retention			

## Education Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1 Produce 5 high-quality luncheon programs that address planner needs				
1.2 Produce 3 high-quality workshops that meet planner needs				
1.3 Develop a buddy/ambassador program to increase luncheon prospects and attendance				
1.4 Produce 2 high quality evening or other education events				
1.5 Complete a 30-second survey to get an idea of what topics our members want to hear about				
1.6 To have 2 successful fall and spring CMP Study Groups				

## Communication Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1 Volunteer Recruitment at website				
1.2 write and submit article for Connects about the committee				
1.3 actively thank/recognize volunteers at meetings				
1.4 1 x article in Connects re: mentor program				
1.5 Create mentor program page at website				
1.6 3 ads in Directory regarding upcoming programs				
1.7 Create a page or section for testimonials at the website				
1.8 Update Facebook and social media sites	Bea Gomez			
1.9 Create a Social Media Chair	Bea Gomez elected			
1.10 Create a plan/process of...				

## Finance & Sponsorship/Advertising Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1				
1.2				
1.3				

## Leadership Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1 Develop & implement a process for recruiting/retaining volunteers	PE			
1.2 Establish & implement a program for volunteer recognition	PE ?			
1.3 process for future leaders				
1.4 Invite & bring 1 non-member to each event	ALL			
1.5 Contact all members for end of Q1 Contact all members for end of Q1	President			
1.6 Review term limits for VP's	President			

## Special Events

Action	Lead	Budget	Completion Date	% Completion
1.1 Fete after Chapter Tools			August 2011	
1.2 October "Oktoberfest" annual event and silent auction			October 2011	
1.3 May golf tournament			May 2012	
1.4 Annual Trade Show			March 2012	

## Administration Action Plan

Action	Lead	Budget	Completion Date	% Completion
1.1				
1.2				
1.3				

## Risk Analysis

*At this point, you have assessed the current organization goals, chapter situation, local market, budgetary needs, etc. In this section, you should look into the successful processes and possible challenges/dangers around the corner, identify them and come up with solutions so they won't surprise you when they come up during the year.*

Currently, the chapter is in good financial health with a balanced budget and surplus planned for the fiscal year of 2011-2012. The potential pitfalls are primarily the financial success of the new special events created to raise funds for the chapter. In order to not continue doing things the way they've been done for the past 3 years, the leadership team has planned changes to our major fundraisers and we could potentially fall short of the goals if not enough strong volunteers are recruited to ensure the success of the programs, thus leading to not reaching the financial goal of each new or recreated event.

The other possible challenge is not breaking even on the 6 monthly events. If the leadership team creates a call tree and each committee commits to calling and inviting guests, we should be able to break even or make a small profit on each of the 6 educational programs.

Each event must make a profit in order for the chapter to remain financially sound.

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

*Please write 5 points per item. You can use your pre-work on the transition document and derive main points from there (Strengths - successful processes, weaknesses - challenges faced, opportunities - recommendations from previous experiences, threats - action items/ pending issues). Please add anything that you find appropriate/important.*

## Operating Environment

## Industry Trends (new)

In assessing industry trends for the geographical region covering our chapter, we have identified the following items, which may impact (negatively/positively) our leadership toward the successful implementation of our business plan.

Social (Culture)	Technology
<i>Baby boomers retiring – more green industry</i> professionals Educating our bosses on the importance of meetings Diversity Culture and generational Change in Procurement procedures affecting our members business practices Decrease in face to face Webinar fatigue (wing in value to face to face) Organizational support of planners (up and down)	Social Networking – Online “e-news” Website Revision Webinar Revision Webinar Education opportunities Trainings Advertising SKYPE Decrease in face to face – replaced with technology Conference call incases Virtual meetings/ avatars MPI App Development? Netbooks Mobile internet

Economic	Political
Recession – affecting advertising sponsorships, memberships Value of meetings Venue increase decrease \$ Perception where, when, \$\$ Lack of funding Mandates (forloughs) Availability Increase in travel costs	Funding programs Furloughs Decreased travel – budgets to participate n MPI events Potential change in Party strengths – CA and USA Residual TARP affects Boycott AZ May cause opportunities/challenges

## Competition

The following organizations/groups compete for the time and resources of our members:

Competition	How They Compete ("X" All That Apply)							Collaboration Possible?
	Education	Membership	Volunteers	Networking	Advertising	Revenue	Branding	
CalSAE	X	X	X	X	X	X	X	-Share mbr list -Share calendar/ education cal- seasonal spec.
SGMP	X	X	X	X	X	X	X	-Share mailing list -Share calendar
NCCMPI	X	X	X	X	X	X	X	-Share Mbr list -Joint events -Share calendar
Seminar Companies	X					X	X	-education sessions
Universities	X					X	X	-education
Other professional organizations (chambers, etc.)	X	X	X	X		X	X	-events
IMPs	X			X				-education
ASAE (No. Ca. Chapter)	X	X		X				-No

## Resources

Our chapter resources consist of:

**Funding**

Our chapter financial resources consist of assets of \$83,287.

**Time and Talent**

Our chapter has \_\_\_ **volunteers**, who, in total, can devote **159 hours** per week to our chapter. To utilize all the talent that is available in our chapter, we need to engage other members and efficiently use their time. To do so will involve us in motivating, coaching, mentoring and delegating.