



2014-2015 Business Plan

Vision

To be the first choice for professional career development and a prominent voice for the global meeting and event community.

Mission

To provide MPI members, chapters and the global meeting and event community with innovative and relevant education, networking opportunities and business exchanges, and to act as a prominent voice for the promotion and growth of the industry.

Executive summary

In 2014-2015 the MPI-Oregon Chapter will purposefully engage its members by enhancing our educational programs through diverse programming, hands on learning and targeted speakers that focus on data driven results. We will engage more of our members, specifically 1-3 year members, in volunteer opportunities and attending our monthly programs. Our members and board are our biggest resource and strength, the passion within our members will help us to achieve success in the coming year. We will challenge the board and our members to dare to do something different to maximize their MPI membership, through focusing on volunteerism and relational participation.

Current situation

<i>Name of Chapter</i>	Meeting Professionals International – Oregon Chapter (MPI-OC)
<i>Status</i>	Legally registered as a not-for-profit professional society
<i>Office</i>	Mailing Address: PO Box 4346, Portland Oregon 97208 Physical Address: 168 NW Spring Meadows Way, Hillsboro, OR 97124
<i>Head Office</i>	MPI Global, Dallas, Texas, USA

Brief history of the Chapter and Current Status

The MPI Oregon Chapter was chartered in 1983. We have 220+ members and a 72.4% retention rate. Our membership is made up of 53% planners and students, and 47% suppliers.

Resources

Our Chapter resources consist of funding, time & talent of our volunteers and resources from MPI Global in Dallas as well as our staff support from our Association Manager.

Funding

Our Chapter has a total of \$82,474 to fund Chapter activities this year.

Time & talent

Our Chapter has Board of Directors and Committee Chair volunteer pool that consistently devotes 5+ hours per week to our Chapter. This volunteer pool totals 32 people. In addition to this committed level of volunteers we have additional talent in our Chapter that we utilize, by engaging other members in committee activities. There are 80+ members that consistently serve on an annual basis to our committees.

MPI Resources

Our Chapter will make full use of the tools and assistance provided by Global. We will do this through monthly calls with our Chapter Business Manager, as well as sending our President and President Elect to two annual conferences held by Global to receive training provided.

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
- Review our business plan at each board meeting to ensure progress against our objectives and strategies
- Review our budget at each board meeting
- Do an evaluation of our education programs and ensure that we have a 4.0 or higher score on a 5 point scale
- Perform a local Chapter needs assessment on a bi-annual basis

Products and services

As a value to our members, MPI Oregon Chapter provides the following products and services on an annual basis:

- Annual directory
- Quarterly online magazine
- Monthly e-blasts
- Monthly educational programs
- Annual regional conference
- Marketplace opportunities online and at monthly meetings
- Advertising & sponsorship opportunities
- Scholarships
- Professional development curriculum
- Leadership development
- Satellite meetings and socials

Operating Environment/Market Analyses

The Industry (Economy, Trends)

The Meetings Industry has been a political and economical focus in our nation beginning in late 2007. We have seen a tremendous trend of negative perception among meetings in the media. However, through grassroots efforts and local support the Meetings industry has combated the media to prove that we are industry of significant value and impact to the economy. With the slowdown of the economy we have seen travel both business and leisure slow down, in addition, we have seen cutbacks among corporate meeting planners in the number and frequency of the meetings they plan. This trend has significantly impacted the industry both for suppliers and planners. However, despite the setback in our economy there is a forecasted light at the end of the tunnel with all reports and trends showing growth among meetings and travel in the U.S. and abroad. The anticipation of “*business on the rise*” and the positive messages that MPI and other meetings organizations have portrayed in the media has given our industry the push it needs to be successful in the coming year.

Our Chapter is particularly affected by

The Local Industry

The Pacific Northwest has historically been the first to enter an economic recession and usually the last to leave. Our area has a high influence of high tech and natural resource markets which tend to be the hardest hit industry during an economic slowdown. This has in turn affected the spending we have seen in meetings and travel in our area. Despite these setbacks locally we have seen positive growth in the Association markets who continue to meet locally. In addition, Portland and the NW in general continue to be the leader in our nation on green and sustainable practices.

Market Analyses

In 2014-2015 we are hoping to focus on the following target markets to grow our membership:

- Local administrative professionals.
- Past members to re-engage them and show them the value & ROI of MPI.
- Association meeting planners.
- Statewide reach to other cities outside of the Portland Metro area.
- Members outside our State who do business in Oregon & SW Washington.
- Student membership.

Competitor Analyses

Our competition locally includes:

- | | | |
|-----------------------------------|--|---|
| • SGMP – Oregon | • ACEP | • Community & Economy – not seeing the value of the Meetings Industry |
| • OSAM | • (IAAP) Association of Administrative Professionals | |
| • Green Meetings Industry Council | • OBTA | |
| • ISES | | |

Competitive Advantages

Our advantages include

- MPI Global Resources
 - Largest Meetings Industry Organization
 - Quality and high level education that we offer
 - Regional Cascadia Conference
 - Largest member group amongst our competition
 - Most recognized brand in the Meetings Industry
-

2014-2015 Business Plan

Membership Recruitment Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Increase New Membership by XX (three more than final numbers for 2013-2014)	Membership Recruitment	Member Recruitment		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Each volunteer to make 10 calls per month to new prospective members on the assigned list and keep the list updated and report back to Member Recruitment Chair on progress each month.		Member Recruitment		6/30/2015	
Develop a New Member Referral Program. Include significant travel prize for any member who recruits the most new members.		Member Recruitment	\$250	9/1/2014	

Membership Recruitment Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Create and Implement a New Member Onboarding Program for Members within their First 30 Days	Membership Recruitment	Member Recruitment		9/1/2014	
Strategies		Lead	Budget	Completion Date	% Complete
Execute and coordinate New Member Welcome with MPI Global and OC Chapter		Member Recruitment		Ongoing	
MPI Spotlight on New Members via Social Media and at Monthly Meetings		Member Recruitment		6/30/2015	
Revamp and Update MPI 101 (9/2014 and 5/2015)		Member Recruitment	\$100	9/1/2014	

Membership Recruitment Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Focus on Corporate/Association Planners and increase planners by 10 planners (110 planner's total)	Membership Recruitment	Member Recruitment		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Develop Committee, Expectations and study how to best connect with these potential new members - emailing, cold calling, etc.		Member Recruitment	\$441	ongoing	
Create a hit list and work to "close business" on memberships for corporate and association planners. One connected with the potential member invite to our next meet-up or social outing		Member Recruitment		6/30/2015	

Membership Retention Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Maintain a year end retention rate of ____%	Member Retention	Member Retention		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Reinvent and rebrand the buddy system		Member Retention		9/1/2014	
Continue to connect & engage with current members		Member Retention		6/30/2015	
Identify and reach out to those members who are uninvolved and possibly dropping their membership		Member Retention		6/30/2015	

Awards Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Plan and Execute Awards Gala	Member Satisfaction	Awards	\$4,985	6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Reorganize all 4 Elements of planning the awards gala		Awards		11/1/2014	
Revamp awards process		Awards		2/1/2014	
Obtain 2 additional nominations in each award category for June 2015 Awards Gala		Awards		2/1/2014	

Membership Retention/Awards Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Celebrate professional and personal life events of members	Member Satisfaction	Member Retention		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Personal handwritten cards to send to members		Member Retention		6/30/2015	
Highlight member happenings in the Oracle, chapter website, Facebook, and Twitter		Member Retention		6/30/2015	
Celebrate member anniversaries at each monthly meeting		Awards	\$400	6/30/2015	

Scholarship Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Obtain a minimum of 5 applications for each scholarship offered	Member Satisfaction	Scholarship	\$2800	5/1/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Review and update award application process		Scholarship		9/1/2014	
Showcase all scholarships that will be offered and educate members on scholarship opportunities		Scholarship		5/1/2015	
Designate a committee member to communicate with the communications team		Scholarship		9/1/2014	

Administrative Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Achieve 31% volunteer engagement by membership	Volunteer Engagement	President Elect		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Recruit volunteers from current membership		President Elect		6/30/2015	
Contact all new members to present engagement opportunities		President Elect		6/30/2015	
Recognize volunteers		President Elect	\$100	6/30/2015	
Leadership appreciation event		President/PE	\$500	6/30/2015	

Administrative Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Leadership Development Program for Committee Chairs	Member Satisfaction/ Volunteer Engagement	President Elect		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Conduct 2 Chair Retreats		President Elect	\$250	4/30/2015	
Quarterly calls with chairs		President Elect		6/30/2015	
Recruit chairs and identify future chairs		President Elect		6/30/2015	

Administrative Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
ROI Campaign	Member Satisfaction	IPP		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Create ROI Program		IPP		8/30/2014	
Implement ROI Program				9/9/2014	

Administrative Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Create Succession Plan	Volunteer Engagement	IPP		6/30/2015	
Strategy		Lead	Budget	Completion Date	% Complete
Create nominations committee		IPP		10/1/2014	
Follow nominations timeline		IPP		4/30/2015	
Announce/Install new board		IPP		6/30/2015	

Administrative Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Past Presidents Council	Member Satisfaction/ Volunteer Engagement	IPP		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Meet Quarterly with specific topics		IPP		6/30/2015	

Special Educational Projects Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Produce 2015 Cascadia Educational Conference	Member satisfaction	CEC		3/30/2015	
Strategy		Lead	Budget	Completion Date	% Complete
\$14,000 revenue back to each chapter		CEC	Income \$14,000	3/30/2015	
<i>NOTE: CEC will have a separate TSR report each month</i>					

Special Educational Projects Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
CMP/CMM Certifications	Member satisfaction	Professional Development		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Have six members participate in the CMP study group		Professional Development		6/30/2015	
Provide member with information about the CMM program and encourage participation		Professional Development		6/30/2015	

Special Educational Projects Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Emerging Leaders Program	Member satisfaction	Professional Development		Quarterly	
Strategies		Lead	Budget	Completion Date	% Complete
Engage new members		Professional Development		6/30/2015	
Plan and Execute four programs quarterly		Professional Development		6/30/2015	

Special Educational Projects Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Master Series Program	Membership Satisfaction	Professional Development		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Engage senior level members		Professional Development		6/30/2015	
Plan and Execute four programs quarterly		Professional Development		6/30/2015	

Special Educational Projects Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Planner Think Tank/Speaker Showcase	Member Satisfaction	Professional Development		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Plan and Execute one day event		Professional Development		6/30/2015	
Work with NSA Oregon to bring in speakers		Professional Development		6/30/2015	
Work with finance and membership committees for sponsorships and attendance		Professional Development		6/30/2015	

Monthly Education Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Achieve a minimum overall score of 4.0 on monthly program evaluations	Membership Satisfaction	Monthly Education	\$13,620	5/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Plan & execute 8 monthly education programs		Monthly Education		5/30/2015	
Plan & execute two regional meetings		Monthly Education		5/30/2015	
Utilize speakers that will resonate with our MPI audience, rely less on PowerPoint and more on real time content		Monthly Education		5/30/2015	

Monthly Education Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Provide higher value & deeper content for attendees	Membership Satisfaction	Monthly Education		5/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Higher speaker engagement prior, during & after monthly meetings		Monthly Education		5/30/2015	
Offer 2 “deep dive” conversations/follow up sessions or one-on-one time with speaker		Monthly Education		5/30/2015	
Develop networking games that also deliver content and education, with tie into the monthly topic		Monthly Education		5/30/2015	

Community Outreach Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Be involved locally with 4 community outreach events	Membership Satisfaction	Community Outreach		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Produce 4 community outreach events with 1 in Eugene		Community Outreach		6/30/2015	
NW Youth Careers Expo		Community Outreach	\$300	6/30/2015	
Allow more visibility for the charity		Community Outreach		6/30/2015	

Publications Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Cover and promote all chapter activities and news	Membership Satisfaction	Publications		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Revise and simplify e-blast		Publications		8/1/2014	
Improve communication of Committee updates and announcements		Publications		8/1/2014	
Produce quarterly ORacle		Publications		7/15/2015	
Produce quarterly postcards		Publications	\$400	5/30/2015	

Publications Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Produce Directory	Membership Satisfaction	Publications		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Revise and simplify e-blast		Publications		8/1/2014	

Website/Social Media Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Increase member usage and satisfaction with website	Membership Satisfaction	Website/Social Media		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Review and update website monthly		Website/SK		6/30/2015	
Research mobile website possibility		Website		10/1/2014	

Website/Social Media Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Increase member usage and satisfaction with Facebook	Membership Satisfaction	Website/Social Media		6/30/2015	
Strategies		Lead	Budget	Completion Date	% Complete
Regular shout outs on social media		Social Media		6/30/2015	
Selfie/social campaign		Social Media	\$400	6/30/2015	
More detailed social media posts		Social Media		6/30/2015	

Partnership Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Increase our partnership contributions by 10%	Financial Management	Partnership	\$750	6/30/2015	
Strategy		Lead	Budget	Completion Date	% Complete
Remix and refresh list		Partnership		8/1/2014	
Rewrite partnership guide		Partnership	\$500	8/1/2014	
Create and execute speaker showcase marketplace		Partnership	\$250	6/30/2015	

Fundraising Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Support the chapters budgetary needs	Financial Management	Fundraising	\$400	6/30/2015	
Strategy		Lead	Budget	Completion	% Complete

			Date	
Refresh and develop new fundraising opportunities	Fundraising		6/30/2015	
Create and implement a silent/live auction at the annual awards gala	Fundraising		6/30/2014	