

**2012-2013 Administrative Action Plan  
As of August 2012**

**Metric 1 Net Member Growth**

11/12 Year End = 228

Meet 0% = 228

Exceeds 1% = 230

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Manage MPI-OC's Student Affiliate Club Program	Net Member Growth	Midge Dobbs	\$800	6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Finalize Lane Community College as a student affiliate club	Midge Dobbs/ LCC Lead		12/31/2012	
Action Plan	Lead	Budget	Completion Date	% Complete
Contact Amanda Eriksen to discuss Student Club Requirements <i>Have discussed the plan with Amanda and requirements for student body of executive team. She is going to get with the students. We agreed that I would get back in touch with her mid-to-end of September.</i>			8/31/2012	100%
Finalize a Lane County lead to coordinate program for Lane Community College			9/30/2012	
If student affiliate club is sponsored and LCC is on board, ensure proper paper work is submitted			9/30/2012	

Strategy	Lead	Budget	Completion Date	% Complete
Assist Clubs quarterly with program content	Midge Dobbs/ LCC Lead		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Work with President at each club to offer education opportunity on quarterly basis <i>Have contacted both Student Clubs. Have yet to hear back from Mt.</i>			6/30/2013	10%

<i>Hood, emailed President, Vice President and Court. Will contact again, waiting for them to get back to school and settled in before I contact again, mid-to-end of September.</i>				
Work with education to coordinate potential of monthly education speakers to speak at student clubs.			6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Set up communication channel for students through Faculty Advisor at Mt. Hood and Lane Community College	Midge Dobbs/ LCC Lead		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ensure both Faculty Advisor and Student Leaders are receiving all communications <i>Have talked with Stephanie to confirm that all students and Court for Mt. Hood are receiving both Oregon and International emails. LCC will be set up once they sign up. Once connect will see if any memberships need to change for graduated students.</i>			8/31/2012	10%
Show Faculty Advisor and Student Leaders MPI International and Oregon website for communication tool			9/30/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Invite Students to Monthly Programs that are hosted	Midge Dobbs/ LCC Lead		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Invite student clubs to October program, check with Bravo if they can volunteer			9/1/2012	
Work with education to coordinate other programs that are hosted, ensure they are invited			9/1/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ensure students re-new membership for 2013/2014 to keep clubs going, including faculty advisors	Midge Dobbs/ LCC Lead	\$800	6/30/2013	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Review program and ensure renewal prior to Mt. Hood Community College renewal dates			4/30/2013	
Review program and ensure renewal prior to Lane Community College renewal dates			6/30/2013	

## Metric 2 Membership Satisfaction

11/12 Year End = 8.47

Meet = 8.5

Exceeds = 8.6

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Enhance Leadership Training	Member Satisfaction	Anne and Jennifer		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Hold two (2) half day training for Chairs	Jennifer and Anne		2/28/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Include Chairs in a half day workshop in August to review chapter process - <i>Chairs required to attend the Board Retreat held prior to August Social.</i>	Anne		8/21/2012	100%
Plan half day workshop exclusively for chairs after December monthly meeting	Anne		12/11/2012	

Strategy	Lead	Budget	Completion Date	% Complete
Hold 1 1/2 day retreat for the 2013-2014 Board of Directors	Jennifer	\$4,000	6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Work with Strategic Alliance on RFP	Jennifer/ Tara		6/30/2013	
Transition documents done prior to Retreat	Jennifer		6/15/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Hold two (2) half day retreats for Board (August and January)	Anne		1/31/2013	
Action Plan	Lead	Budget	Completion Date	% Complete

Plan and execute half day retreat for Board and Chairs - <i>held prior to the August Social with committee Chairs</i>	Anne		8/21/2012	100%
Plan and execute half day retreat for Board after the January monthly meeting	Anne		1/15/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Have the President Elect, VP Education, VP Membership and Association Manager attend the Chapter Business Summit	Administration	\$1,500	9/30/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
All parties registered			7/31/2012	100%
Airfare/Hotel reservations for us to fly together	Jennifer/Stephanie		8/30/2012	100%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Have the President attend the 2012 WEC <i>(budget also includes air and registration for 2013 WEC)</i>	Anne	\$2,375	7/31/2012	100%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Represent Oregon Chapter at Chapter Leadership Forum	Anne		7/28/2012	100%
Represent Oregon Chapter at WEC in St. Louis	Anne		7/31/2012	100%
Submit expenses to Stephanie for reimbursement	Anne		8/17/2012	100%
Write report to provide Board and Chairs reviewing take-aways	Anne		10/1/2012	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Enhance Communications Among the Board and the Chapter	Member Satisfaction	Anne Hallinan		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
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Hold Quarterly Conference Calls with each person on the board to stay in communication, discuss areas that need assistance and areas of success.	Anne Hallinan		6/30/2013	10%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Reach out to Board members to determine best day and time to have calls	Anne		8/30/2012	100%
Send calendar appointments to each director for the first half of the year	Anne		8/30/2012	100%
Reevaluate day and time midway through the year and adjust if necessary	Anne		1/31/2013	
Send calendar appointments to each director for the second half of the year	Anne		1/31/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Continue to use Window's Live as a method of communication for Board and Chairs	Stephanie Kennedy/Anne Hallinan		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Discuss with Stephanie issues	Anne		10/31/2012	
Work with Stephanie to come up with solutions to people not being able to access	Anne		10/31/2012	
Consider and research alternatives to Window's Live	Anne		10/31/2012	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Volunteer Recognition	Member Satisfaction	Anne and Jennifer	\$500	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Continue to send thank you cards to chapter leaders and committee members to go above and beyond	Anne		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Stay aware of milestones and those who go above and beyond	Anne		6/30/2013	

Send hand-written thank you cards	Anne		6/30/2013	
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<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Send letter to Chapter Leaders' Bosses about their involvement and contribution to MPI-OC	Anne		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Write letters to the boss or supervisor of each Board member	Anne		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Monthly volunteer recognition program (list from Directors each month)	Jennifer		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Send email request to Directors prior to each monthly meeting <i>Sent email 9/13 for response by 9/14 for Sept meeting</i>	Jennifer		6/30/2013	10%
Announce names and winner at each meeting <i>Steph to get the Starbucks card, Anne to announce winner (JC on vaca for Sept)</i>	Jennifer		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Volunteer recognition/ appreciation - Plan an activity for the BOD and Committee Chairs for May/June 2013	Anne and Jennifer		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Solicit sponsor for volunteer appreciation activity	Anne		03/31/2013	
Invite all BOD and Chairs to attend	Anne		04/30/2013	
Organize event	Anne/Stephanie		06/30/2013	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Continue Past Presidents Council	Member Satisfaction	Midge Dobbs		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Invite all Past Presidents to first meeting of the year, encouraging new participation above last year	Midge Dobbs		7/30/2012	100%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Invite all utilizing email calendar, keeping a list of those who have RSVP'd and remind a week out	Midge Dobbs		7/30/2012	100%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Hold quarterly meetings with Past Presidents, encouraging feedback and historical perspective from past leadership	Midge Dobbs		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Have unique topics at each meeting including major areas of the chapter (1) Member Recruitment (2) Strategic Alliance (3) Education (4) Leadership	Midge Dobbs		6/30/2013	25%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Report to the Board notes from Past Presidents meetings	Midge Dobbs		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide notes in written form within 7 days post meeting for review at following board meeting.	Midge Dobbs		6/30/2013	25%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Invite all Past Presidents to Awards Gala	Midge Dobbs		5/31/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>

Reach out with personal phone calls to all Past Presidents	Midge Dobbs		5/31/2013	
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Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Intentionally build and shape chapter future	Member Satisfaction	Midge Dobbs		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Elect a strong 2013-2014 board of directors	Midge Dobbs		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Prepare packets with nominations information	Midge Dobbs		11/30/2012	
Nominations deadline	Midge Dobbs		12/31/2012	
Committee interviews of candidates	Midge Dobbs		1/31/2013	
Consent letter due date	Midge Dobbs		1/31/2013	
Present slate to board for review	Midge Dobbs		2/19/2013	
Present slate to membership to review	Midge Dobbs		2/19/2013	
Slate voted on by membership e-vote	Midge Dobbs		3/22/2013	
2013-2014 board information sent to International	Stephanie Kennedy		4/1/2013	
2013-2014 Board presented to membership	Midge Dobbs		4/16/2013	
2013-2014 Board Installation	Midge Dobbs		6/30/2013	

### Metric 3 Engagement/Participation

- **Increase volunteers**
  - 11/12 = 75                      Meet = 80                      Exceeds = 90
- **Increase number of new members (1-3 years) participating**
  - 11/12 = 6                              Meet = 12                              Exceeds = 16

- Increase satisfaction of education programs

- 11/12 = 4.14

Meet = 4.15

Exceeds = 4.25

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Secure at least 80 members to be actively involved on committees	Engagement/Participation	Jennifer		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Hold two (2) volunteer recruitment campaigns (Sept/ May)	Jennifer		5/31/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Have Top 10 Reasons to volunteer in Sept/ May email blasts <i>It was in the summer online magazine and posted on Facebook page Sept</i>	Jennifer		5/31/2013	
Get registration lists from Stephanie for Sept and May, personally invite ppl to recruitment events	Jennifer		5/31/2013	
Encourage Chairs and Directors and other committee members to make each table look inviting <i>Sent potential cmte member list to each team (new members list (w/i 2yrs) sent 8/6 and non involved members sent 9/13)</i>	Jennifer		5/31/2013	50%

Strategy	Lead	Budget	Completion Date	% Complete
Assist chairs in filling committee positions	Jennifer		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Go through member list- newer members (2yrs or newer first) <i>Sent list of new members w/i 2 yrs on 8/6/12; will continue to contact new members as they join</i>	Jennifer		6/30/2013	10%
Ask Chairs/Directors for monthly task list; send out "Got a Minute" to members <i>Sent request 9/13 for response by 9/14</i>	Jennifer		On going	10%

Each committee to have a committee member who has never been on a committee before  
*Both lists sent to teams were of non-involved members*

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Succession Planning	Engagement/Participation	Jennifer		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop leadership pool list for all positions (to be continually developed throughout the year) for the 2012/2013 year and to hand off to the President Elect for the 2013/2014 year	Jennifer		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Go through membership list/ database- who has done what	Jennifer		On going	
Reach out to seasoned members based on involvement (ask for new involvement)	Jennifer		On going	

Contact Directors and Chairs for future plans	Jennifer		6/30/2013	
Create spreadsheet from database for potential future leaders	Jennifer		6/30/2013	


**2012-2013 Finance Action Plan  
As of August 2012**

**Metric 4 Chapter Financial Management**

- **Maintain +/- 5% on net income**
  - 12/13 = \$50.00                      Meet = \$52.50/\$47.50
  
- **Education Ratio (speaker expenses/revenue)**
  - 11/12 = 20%                      Meet = 20%                      Exceeds = 23%

Fundraising Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Implement a fundraising program that raises \$8,875 in revenue.	Chapter Financial Management	Fundraising	\$8,875 Revenue	6/30/2013	1%

Strategy	Lead	Budget	Completion Date	% Complete
50/50 Raffle Tickets Program (Tickets Sold: ½ revenue goes to Fundraising, ½ revenue goes to Ticket Holder)	Fundraising	\$375 (\$95 per event)	6/1/2013	14%
Action Plan	Lead	Budget	Completion Date	% Complete
Raffles will be held on the following dates (8/21, 9/18, 2/9, 4/16)	Nichole Cooper	\$375	6/1/2013	25%
Utilize Chapter Email Blasts to Gain Prizes for the 50/50 Raffle in addition to the Cash Raffle	Nichole		6/30/2013	20%
Financial Results: 8/21 - Raised Total \$105.00. \$52.00 to MPI	Nichole	\$52.00	8/21/2012	100%
9/18 -	Nichole		9/19/2012	
2/19 -	Nichole		2/19/2013	
4/16 -	Nichole		4/16/2013	

Strategy	Lead	Budget	Completion Date	% Complete
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Awards Banquet Silent Auction	Fundraising	\$5,500	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Fundraising Committee Meeting – Discuss Specific Plans and Actions for the Silent Auction (what has worked well in the past, new ideas)	Nichole		10/15/2012	
Division of Committee Members to focus on Specific Parts of the Auction	Nichole		11/1/2012	
Donation Requests to be Sent out Early Again in 2012	Nichole		1/15/2013	
Conference Call to Discuss Progress of Donations – Plans and Actions Moving Forward	Nichole		4/1/2013	
Bi-Weekly Conference Calls – Beginning May 1, 2012	Nichole		6/30/2013	
Week of Event Detail/Set-Up – TBA	Nichole		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Two “Big Basket” raffles (first one 100 tickets at \$20 each, second one 100 tickets at \$10 each)	Fundraising	\$3,000	5/31/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Big Raffle Basket (Trip w/ Airfare) ~ Donation Requests to Go Out <ul style="list-style-type: none"> <li>9/7 Main Raffle Prize Received (Gift Certificate for Lodging and Spa). Need to work on Airfare and Additional Package Ideas.</li> </ul>	Nichole		8/21/2012	20%
Design Raffle Tickets and Possible Ticket Promotion	Nichole		9/25/2012	
Big Raffle Tickets on Sale	Nichole		10/24/2012	
Big Raffle (Goal is \$2,000 for October Promotion)	Nichole		12/11/2012	
Design Plan and Items for Medium Raffle Basket	Nichole		1/10/2013	

<b>Strategic Alliance Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Implement a Strategic Alliance Program that will raise \$13,700 in revenue	Chapter Financial Management	Strategic Alliance	\$13,700 Revenue	6/30/2013	15%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
MPI Partnership Program/ Cash Sponsors \$3,500 as of 9/11/12	Strategic Alliance	\$6,600	6/30/2013	53%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Actively call and engage with the out of state CVB's to increase sponsorship, give them enough advance lead time and suggest that they can plan their in town client events to coordinate with MPI events, (monthly meeting sponsorships, ect) <ul style="list-style-type: none"> <li>• Contacted CVB's through phone &amp; email. San Diego is interested in December. Vancouver, DCDRA &amp; Rancho Las Palmas Resort are working on their 2013 travel schedule now and will keep us in mind.</li> </ul>	Kelly/Tara		9/15/2012	50%
Create a bundled package that includes website marketing and a dedicated email package, actively sell to members through marketing to include phone, email, MPI Web and Oracle <ul style="list-style-type: none"> <li>• Committee meeting will be scheduled this month to review this plan. Will divide member list between committee members so we can begin prospecting.</li> </ul>	Kelly/Tara		6/30/2012	20%
Send out a bi monthly advertising piece through MPI blasts and web, to include the Oracle. Ads to come out in August, October, December, Feb and April <ul style="list-style-type: none"> <li>• Marketing piece was included in 9/4 email blast &amp; will be in the next Oracle</li> </ul>	Kelly		6/30/2013	20%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
MPI Partnership Program/In Kind Sponsors \$29,200 as of 9/11/12	Strategic Alliance	\$47,000	6/30/2013	62%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>

Contact all past In Kind Sponsors from 2011 – 2012 to partner for 2012 - 2013 <ul style="list-style-type: none"> <li>We have contacted sponsors from last year, and have collected signed Partnership Agreements.</li> </ul>	Kelly		6/30/2013	80%
Follow up with Monthly contact to make sure that the partners are feeling the value of their partnership <ul style="list-style-type: none"> <li>Continuing to work with current Partners on when they would like to use their benefits.</li> </ul> TT - Kelly has been doing a great job in her efforts with this and is on top of this.	Kelly		6/30/2013	15%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Sell Marketplace Opportunities at the February 2013 Meeting and the Satellite Meetings TT - we have started a list of interested parties that we will solicit later in 2012/ beginning of 2013	Strategic Alliance	\$1,500	4/30/2013	15%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Send out an ad via MPI web and Oracle to increase sales <ul style="list-style-type: none"> <li>Marketing piece was included in 9/4 email blast &amp; will be in the next Oracle</li> </ul>	Kelly		4/30/2013	
Call past Marketplace Vendors to sell table space for 2013	Kelly		4/30/2013	
Continue to offer the opportunity to split a table top exhibit, through phone, email and ads	Kelly		4/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Partner with the Oregon Employer Council on the 2013 Speaker Showcase	Strategic Alliance	\$3,000	6/30/2013	15%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Meet with the OEC Contact Greg Ivers to develop a plan to enhance participation and ensure satisfaction for the 2013 Speaker Showcase	Tara/Kelly	\$3,000	6/30/2013	15%

<ul style="list-style-type: none"> <li>9/7 Meeting with Greg - scheduled event for June 11, 2013.</li> <li>TT - Kelly and I met with Greg to establish our combined goals for SS, Greg is behind our idea to pre-qualify speakers and we have asked if we can offer suggestions for speakers that are in the MPI speaker database, one of the comments from last year is that the topic was too government centric. Greg is also going to check on the exact amount that his planner attendees are able to accept in "prizes" basically he stated that if everyone can win something, then it is acceptable but one of a kind prizes would not be accepted. We are going to work with the vendors to have prize appropriate values so everyone can participate.</li> </ul>				
Create a Passport Program for the Speaker Showcase	Kelly	\$3,000	6/30/2012	
Work with Greg to develop a plan for qualifying the speakers that are chosen to speak at the event	Tara/Kelly	\$3,000	6/30/2013	10%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create a Campaign to Sell Dedicated Emails bundled with Web Ads	Strategic Alliance	\$1,500	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create an ad campaign to actively sell the dedicated email and web ad package	Kelly		6/30/2013	
TT - The October ad will be focused on the bundled package, maybe offer a discount if this is approved by the board				

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create a New Sponsorship for the Student Clubs	Strategic Alliance	\$800	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Contact the past presidents and leaders to strategically sell the Student Club Memberships - We will check with Stephanie for the list	Kelly		6/30/2013	
Recognize these supporters at a monthly luncheon or June Gala			6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Planner Think Tank Sponsorship	Strategic Alliance	\$300	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Strategically sell through phone calls, e-mail, web ads	Kelly	\$300	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ensure Sponsorship Benefits Are of Value to Members	Strategic Alliance		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Monthly Check in with Members to make sure they are feeling the benefits and ROI	Kelly/Tara			
Check in with Partners at the Monthly Meetings and ask if they need anything from us, inform them of upcoming partnerships and MPI event dates to remember ( Marketplace, Speaker Showcase, ect)	Kelly/Tara			

**2012-2013 Communications Action Plan  
As of August 2012**

**Metric 1 Net Member Growth**

11/12 Year End = 228

Meet 0% = 228

Exceeds 1% = 230

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Develop and implement a plan for outbound communications to the local business media	Net member growth	Promotions		Ongoing	

Strategy	Lead	Budget	Completion Date	% Complete
Work with community outreach committee to find compelling stories	Katherine Hoppe		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Send out email asking local chapter members what their MPI story is	Public Relations Chair		Monthly	
Create stories for press releases	Public Relations Chair		Monthly	
Ask members about big events they have planned and estimate economic impact on community	Public Relations Chair		Monthly	

Strategy	Lead	Budget	Completion Date	% Complete
Develop strategic plan for event calendars	Promotions		8/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Create specific press releases aligned to promote membership meetings in local media.	Public Relations Chair		Monthly	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop press release schedule identifying press release topics and target dates.	Public Relations Chair		Quarterly	
Submit a minimum of 1 press release per quarter to local, regional and national media showcasing newsworthy, membership focused information – including June press release to announce award winners and new board installation.	Public Relations Chair		9/15/2012 12/15/2012 3/15/2013 6/15/2013	

## Metric 2 Membership Satisfaction

11/12 Year End = 8.47

Meet = 8.5

Exceeds = 8.6

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Continue communications committee as the centralized lead for development and distribution of all chapter messages for internal departments	Member satisfaction	Communications		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Work with the Education Team to promote monthly meetings by designing and producing save the date postcards. Postcards to be mailed 3 times per year.	Publications	\$300	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Postcard team to contact education team on monthly basis to get 3-month out schedule of topics, locations, and meeting times for inclusion in postcards.	Midge Dobbs/ Maili Morrison		8/10/2012 12/10/2012 3/10/2013 5/10/2013	25%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>

Continue sending email blasts to membership twice a month	Assn. Mgr.	\$306	Ongoing	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Work with Association Manager to help coordinate communications from all MPI-OC Committees to solicit information that they want distributed into all e-blasts.	Katherine Hoppe		2x/month per schedule set up by Assn Mgr.	

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Provide a printed directory	Member satisfaction	Publications		9/27/2012	

Strategy	Lead	Budget	Completion Date	% Complete
Produce 2012-2013 printed directory to be provided to all members with accurate information at the time of press	Publications		9/27/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ad Space reservation	LLM Publications		8/10/2012	100%
Cover proof to MPI	LLM Publications		8/10/2012	100%
Ad copy Due	LLM Publications		8/17/2012	100%
Cover approved-approved by Wild Horse and the MPI committee. One small change is being completed for the final proof	Alex Doyle / Merrissa Burleigh		8/17/2012	95%
Member photos due to LLM	Members		8/17/2012	100%
Member data and Text Files due to LLM			8/17/2012	100%
Rough Draft to MPI (membership sections only)	LLM Publications		8/24/2012	100%
Rough draft returned to LLM	Alex Doyle / Merrissa Burleigh		8/31/2012	100%

Comprehensive proof to MPI	LLM Publications		9/5/2012	100%
Comprehensive proof due back to LLM	Alex Doyle / Merrissa Burleigh		9/10/2012	100%
Office quantity and mailing list due to LLM	Alex Doyle / Merrissa Burleigh		9/10/2012	100%
Final proof to MPI	LLM Publications		9/11/2012	
Approval to print	Alex Doyle / Merrissa Burleigh		9/12/2012	
Directories mailed to members and shipped to association	LLM Publications		9/27/2012	
Mid-Year Addendum	Assn Mgr.		1/10/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Plan out 2013-2014 printed directory to be provided to all members with accurate information at the time of press	Publications		9/27/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop strategy to sell front cover in light of LLM Publications inability to do so	Publications		5/15/2013	
Ad Space reservation	LLM Publications		7/15/2013	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide members a quarterly online magazine	Member satisfaction	Publications		Quarterly	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>

Produce and distribute online magazine for members	Publications		9/29/2013	
<b>Action Plan – FALL ONLINE NEWSLETTER</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Sales close Aug 16 (2013)	LLM Publications		8/17/2012	LLM
Develop and communicate proposed story lines and articles for upcoming online magazine (Story list developed 8/16)	Jennifer Walsdorf		8/25/2012	100%
Reach out to membership to solicit stories or articles for online magazine (Email to Directors, VPs and Chairs soliciting stories 8/16)	Jennifer Walsdorf		8/20/2012	100%
Storylist due to LLM (Completed: 10 articles, Strategic Alliance ad, October Education flyer + anniversaries/new members/members on the move)	Jennifer Walsdorf		9/7/2012	100%
Text and photos due to LLM (Waiting on two more articles, some revisions necessary; will have all content and photos turned in on Friday, September 14 <sup>th</sup> )	Jennifer Walsdorf		9/14/2012	80%
Proof 1 to MPI	LLM		9/21/2012	0%
Proof 1 returned to LLM	Jennifer Walsdorf		9/26/2012	0%
Approved to post	Jennifer Walsdorf		9/28/2012	0%
Web files to be posted	LLM		10/5/2012	0%
Request, track and communicate readership / click-throughs metrics on online magazine from LLM – Report at October Board meeting (Met with Linda Pope from LLM on 9/10 to discuss ORacle; requested readership/click-through metrics; she is looking into this, as it would come from LLM (they host the online magazine on their server))	Jennifer Walsdorf		10/24/2012	25%

<b>Action Plan – WINTER ONLINE NEWSLETTER</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop and communicate proposed story lines and articles for upcoming online magazine	Jennifer Walsdorf		11/25/2012	
Reach out to membership to solicit stories or articles for online magazine	Jennifer Walsdorf		11/30/2012	
Storylist due to LLM - March 8, June 7, Sept 6 2013	Jennifer Walsdorf		12/6/2012	

Text and photos due to LLM Mar 15, June 14, Sept 13 2013	Jennifer Walsdorf		12/13/2012	
Proof 1 to MPI Mar 22, June 21, Sept 20, 2013	Jennifer Walsdorf		12/20/2012	
Proof 1 returned to LLM Mar 27, June 26, Sept 25 2013	Jennifer Walsdorf		12/31/2012	
Approved to post Mar 29, June 28 and Sept 27 2013	Jennifer Walsdorf		1/3/2013	
Web files to be posted April 5, July 5, Oct 4	Jennifer Walsdorf		1/10/2013	
Request, track and communicate readership / click-throughs metrics on online magazine from LLM – report at January Board meeting	Jennifer Walsdorf		1/15/2013	

<b>Action Plan – SPRING ONLINE NEWSLETTER</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop and communicate proposed story lines and articles for upcoming online magazine	Jennifer Walsdorf		3/20/2013	
Reach out to membership to solicit stories or articles for online magazine	Jennifer Walsdorf		3/1/2013	
Storylist due to LLM	Jennifer Walsdorf		3/8/2013	
Text and photos due to LLM	Jennifer Walsdorf		3/15/2013	
Proof 1 to MPI	Jennifer Walsdorf		3/22/2013	
Proof 1 returned to LLM	Jennifer Walsdorf		3/27/2013	
Approved to post	Jennifer Walsdorf		3/29/2013	
Web files to be posted	Jennifer Walsdorf		4/5/2013	
Request, track and communicate readership / click-throughs metrics on online magazine from LLM – report at April Board meeting	Jennifer Walsdorf		3/16/2013	

<b>Action Plan – SUMMER ONLINE NEWSLETTER</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
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Develop and communicate proposed story lines and articles for upcoming online magazine	Jennifer Walsdorf		5/20/2013	
Reach out to membership to solicit stories or articles for online magazine	Jennifer Walsdorf		5/30/2013	
Storylist due to LLM June 7, Sept 6 2013	Jennifer Walsdorf		6/7/2013	
Text and photos due to LLM June 14, Sept 13 2013	Jennifer Walsdorf		6/14/2013	
Proof 1 to MPI June 21, Sept 20, 2013	Jennifer Walsdorf		6/21/2013	
Proof 1 returned to LLM June 26, Sept 25 2013	Jennifer Walsdorf		6/26/2013	
Approved to post June 28 and Sept 27 2013	Jennifer Walsdorf		6/28/2013	
Web files to be posted July 5, Oct 4	Jennifer Walsdorf		7/5/2013	
Request, track and communicate readership / click-throughs metrics on online magazine from LLM – report at June Board meeting	Jennifer Walsdorf		6/18/2013	

<b>Action Plan –FALL ONLINE NEWSLETTER</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Sales close	Jennifer Walsdorf		8/16/2012	
Develop and communicate proposed story lines and articles for upcoming online magazine	Jennifer Walsdorf		5/20/2013	
Reach out to membership to solicit stories or articles for online magazine	Jennifer Walsdorf		5/30/2013	
Storylist due to LLM	Jennifer Walsdorf		9/6/2013	
Text and photos due to LLM	Jennifer Walsdorf		9/13/2013	
Proof 1 to MPI	Jennifer Walsdorf		9/20/2013	
Proof 1 returned to LLM	Jennifer Walsdorf		9/25/2013	

Approved to post	Jennifer Walsdorf		9/27/2013	
Web files to be posted	Jennifer Walsdorf		10/4/2013	
Request, track and communicate readership / click-throughs metrics on online magazine from LLM – report at October Board meeting	Jennifer Walsdorf		10/15/2013	

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Enhance MPI presence in online social media	Member satisfaction	Technology		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Provide social networking opportunities to our members via access to the homepage of MPI-OC website	Technology		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Create Facebook “like” sticker or ribbon to put on badges of members who have liked our Chapter Facebook page.	Social Media Lead		11/1/2012	
Conduct Twitter contest with prize for largest number of Tweets	Social Media Lead	\$200	<b>Committee decided NOT to do this in 2012</b>	
Make sure “follow” and “like” and “share” buttons on new MPI website	Karen Waggoner		9/15/2012	100%
Develop questions for annual membership survey on social media preferences.	Social Media Chair		?? Not sure when member survey goes out??	

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
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Build member affinity by highlighting members in printed and social media	Member satisfaction	Technology	\$126	6/30/2013	
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<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Hire and retain chapter photographer to take pictures at all events for future use of images on social media channels, promotional materials, and chapter website as well as directory.	Technology	\$126	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create new album and post monthly meeting photos on Facebook Check into liability issues for taking photos of speaker and attendees without waivers.	Dawn Rasmussen		Monthly	
Post monthly meeting photos on MPI OC website	Assn. Manager		Monthly	

### Metric 3 Engagement/Participation

- **Increase volunteers**
  - 11/12 = 75                      Meet = 80                      Exceeds = 90
- **Increase number of new members (1-3 years) participating**
  - 11/12 = 6                              Meet = 12                              Exceeds = 16
- **Increase satisfaction of education programs**
  - 11/12 = 4.14                              Meet = 4.15                              Exceeds = 4.25

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Increase member usage of the MPIOC website to provide relevant, timely chapter/industry information and resources	Engagement/Participation	Technology	\$2,100	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion</b>	<b>% Complete</b>
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			<b>Date</b>	
Monthly updates to direct members back to website	Technology		Ongoing	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide administrative support / audit content for accuracy; conference call with Stephanie complete 9-7	Karen Waggoner		Ongoing	10%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ongoing links to social media and vice versa	Technology		Ongoing	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Basic informational posts to LinkedIn, Facebook, and Twitter	Social Media Chair		Weekly	
Each committee to designate one person per month to address posting in social media channels regarding MPI OC goings on or deadlines. This will help communicate important deadlines and encourage engagement on social media channels.	<b>Each committee</b>		Monthly	
Ask attendees to tweet during meeting using specific hashtag	Dawn Rasmussen		Monthly	
Develop reusable table tent signs highlighting MPI-OC social media links	Karen Waggoner		9/19/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Investigate potential of making chapter website mobile-friendly	Technology		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ping MPI HQ to find out if mobile-friendly site builder is available; if not avail, investigate free/low-cost mobile-friendly programs	Karen Waggoner		12/1/2012	
Investigate potential of having MPI-OC website being converted into mobile app	Karen Waggoner		12/1/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion</b>	<b>% Complete</b>
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			<b>Date</b>	
Website maintenance and hosting	Technology	\$2,100	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ensure conversion is complete for MPI-HQ switchover and that all contract terms are met and content areas transferred correctly and are up to date.	Karen Waggoner		ongoing	100%

## Metric 4 Chapter Financial Management

- **Maintain +/- 5% on net income**
  - 12/13 = \$50.00                      Meet = \$52.50/\$47.50
- **Education Ratio (speaker expenses/revenue)**
  - 11/12 = 20%                      Meet = 20%                      Exceeds = 23%

<b>Objective 1</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Directory advertising will achieve a net revenue of \$4,500	Chapter financial management	Publications	\$4,500 Revenue	10/31/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Work with LLM on advertising sales	Publications	\$4,500	10/31/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Check in with LLM	Alex Doyle/Merrissa Burleigh		9/15/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Sell cover of directory as prime long-shelf-life partner opportunity	Publications	\$500 income	10/31/2012	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Contact LLM and ask them to make a concerted effort to sell cover.	Alex Doyle/Merrissa Burleigh		10/31/2012	

## 2012-2013 Membership Action Plan As of August 2012

### Metric 1 Net Member Growth

11/12 Year End = 228

Meet 0% = 228

Exceeds 1% = 230

Objective 1	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Maintain total membership of 228	Net member growth	Member Recruitment		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Create a Task Force to focus on getting new members.	Member Recruitment	\$300	6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Find 5 passionate Task Force members who are dedicated to increasing our membership	Susan/Cyndi		9/30/2012	
Divide the committee up to focus on specific regions or clientele	Susan/Cyndi		9/30/2012	
Follow up with New Members after each monthly meeting	Task Force		6/30/2013	
Have the Task Force greet and sit with New Members at each monthly meeting to help make them feel welcome and answer questions.	Task Force		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Sales blitz to potential members that include outlying cities.	Member Recruitment		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
We are going on sales calls! The Task Force will focus on potential members and locations.	Task Force		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Secure 6 new subscriber members	Member Recruitment		6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Prospect MPI west coast chapter members via phone and email.	Task Force		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create an email campaign for non-members to attend sponsored meetings for \$1.	Member Recruitment		5/31/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Work with Education to determine the fully sponsored meetings.	Susan		9/15/2012	
Create collateral to send out via email	Susan		5/31/2013	
Post on social media sites and website	Susan		5/31/2013	
Follow up with guests after each meeting	Task Force		5/31/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Exhibit at Bravo Tradeshow	Member Recruitment	\$225	10/24/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create a theme for the booth	Susan		9/15/2012	
Work with Royce's Prop Shop and see if they can provide simple décor so we stand out at the show.	Susan		9/15/2012	
Choose one qualified attendee to attend one MPI-OC monthly meeting or social for free.	Task Force		10/31/2012	

Follow up with all attendees that their business card for more information	Task Force		11/1/2012	
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## Metric 2 Membership Satisfaction

11/12 Year End = 8.47

Meet = 8.5

Exceeds = 8.6

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Provide multiple chapter involvement opportunities to members	Member Satisfaction	Retention	\$3,460	6/30/2013	30%

Strategies	Lead	Budget	Completion Date	% Complete
Plan 2 fully hosted member Socials in Portland (August/March) August 21 and March 19	Retention Committee	\$500	3/30/2013	50%
Action Plan	Lead	Budget	Completion Date	% Complete
Send out the RFP for the Socials to Portland Venues.	Lora/Stephanie		8/10/2012	75%
Review RFP's and select venue for the 2 socials. <ul style="list-style-type: none"> <li>Successful social at the University Place for August Social</li> <li>Still determining March Social Venue</li> </ul>	Lora/Amber/Committee		10/31/2012	50%
Announce dates and location on MPI Media for the events. <ul style="list-style-type: none"> <li>Media was sent out for August Social</li> </ul>	Lora/Committee		September/March	50%

Strategy	Lead	Budget	Completion Date	% Complete
Plan (1) hosted Social in both Bend and Eugene in October Eugene – October 9 Bend - Oct 10	Retention Committee		6/1/2013	75%
Action Plan	Lead	Budget	Completion Date	% Complete
Send out the RFP for the Socials to Bend and Eugene Venues. <ul style="list-style-type: none"> <li>Eugene Social booked for October 9th at the Red Lion</li> <li>Bend Social booked for October 10th at Brasada Ranch in Bend</li> </ul>	Stephanie/Lora/Amber		9/10/2012	100%

Review RFP's and select venue for the 2 socials. <ul style="list-style-type: none"> <li>Venues were selected for both socials</li> </ul>	Lora/Amber/Committee		9/15/2012	100%
Announce dates and location on MPI Media for the events. <ul style="list-style-type: none"> <li>Announcements have been made on Twitter, MPI Website and Facebook for remote socials.</li> </ul>	Lora/Committee		Ongoing	50%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Plan (2) Community Outreach events in Bend and Eugene Corresponding with the Portland Community Outreach event- "MPI Corporate Responsibility Day September/November"	Community Outreach		12/1/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
TBD				

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Plan (2) More Portland community Outreach events- Hold (4) Total Community Outreach events- 1 per Quarter Feb/May	Community Outreach		6/1/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
TBD				

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion</b>	<b>% Complete</b>
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			<b>Date</b>	
Plan 2 MPI 101 Member Orientations November/May	Retention	\$100	6/1/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Email save the date/invitation to new members letting them know the dates of the Orientations. (September) <ul style="list-style-type: none"> <li>MPI 101 has been moved to December and April</li> </ul>	Lora Valdez		9/30/2012	
Email reminder 1 month out to new members. November and March	Lora Valdez		10/30/2012	
Schedule Board members to attend the Orientation and talk about aspects of MPI	Amber Cagle		10/30/2012	
Create interactive game on MPI information that was talked about by the Board Members. (September)	Amber Cagle		9/30/2012	
Buy prizes for the winners of the game and smaller prizes for the attendees. (Starbucks cards – 6-\$10.00 cards and Candy bars)	Lora Valdez	\$100	9/30/2012	
Email save the date/invitation to new members letting them know the dates of the Orientations. (November, March)	Lora Valdez		ongoing	
Email reminder 1 month out to new members. March	Lora Valdez		4/15/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ambassador Program- “Meet and Greet” New Members at Monthly Meetings	Retention	\$60	6/1/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Schedule 1-2 members for every MPI Meeting to meet new members <ul style="list-style-type: none"> <li>Lora and Amber are going to be the September Ambassadors</li> </ul>	Lora		Ongoing	10%
Purchase \$5.00 Starbucks gift cards to thank Members for being an Ambassador	Lora	\$60	10/1/2012	
Send out new member list to the Ambassadors.	Lora		Ongoing	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Board Touch Program 2X per Year December/April	Retention		5/1/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create questions for Board Touch Calls (November/March Board Meeting)	Amber/Lora		Ongoing	

Get current "Active" member list from Stephanie.	Stephanie		Ongoing	
Distribute assigned calls to Board Members with questions – to be completed by end of November/March	Lora/Amber		Ongoing	
Collect feedback from Board Touch Calls	Lora/Amber		Ongoing	
Compile master list of feedback to be reviewed at January/May board meeting	Lora		ongoing	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Award scholarships	Scholarship Committee	\$3,300	6/1/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop Scholarship Calendar with key event dates and scholarship deadlines	Elaine		8/15/2012	100%
Review application steps in an effort simplify submission process	Elaine/Karen		8/15/2012	100%
Develop marketing strategy to increase number of applicants; <i>continue consistent branding, tentcards</i>	Elaine/Karen		9/7/2012	50%
Contribute to monthly e-blast to promote scholarships			Ongoing	
Receive and evaluate applications for CMP/CMM award; <i>CMM course sold out for Nov 2012; future date not determined; focus on CMP</i>	Elaine/Karen	\$1000	TBD	
Receive and evaluate applications for WEC/CMP Conclave award	Elaine/Kimera	\$1300	TBD	
Work with Cascadia Committee to simplify/standardize awards process	Jamie		1/10/2013	
Receive and evaluate applications for Cascadia Scholarship	Jamie	\$525	TBD	
Receive and evaluate applications for Membership Scholarships (4 @ \$125); <i>one award granted 9-8</i>	Karen	\$500	Ongoing	25%
Work with scholarship recipients to write articles for ORacle			Ongoing	

<b>Objective 2</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Enhance Member Recognition Opportunities and Events	Member Satisfaction	Awards	\$5,600	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
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Annual Awards Banquet and Board Recognition	Camille/Christina	\$4,825	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>		
Finalize Chair positions and Committee Members	Awards		9/30/2012	50%
Create RFP For June 2013 Gala	Stephanie		12/31/2012	100%
Send out Gala RFP- Likely need to resend- no response	Stephanie		1/15/2013	50%
Select Gala Venue	Awards		2/28/2013	
Schedule Awards Committee planning Meetings- Monthly Feb- June	Awards		2/1/2013	
Send out 2013 call for Nominations-Send out last year's scoring and info for review	Awards		5/1/2013	
Review Nominations packet and select winners	Awards		5/28/2013	
Order Awards	Awards	\$500	6/8/2013	
Design and print programs	Awards		5/18/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Monthly Member Anniversary Recognition	Camille/Christina	\$775	6/30/2013	10%
<b>Action Plan</b>				
Purchase or get sponsored GC's for member anniversaries	Camille Christina	\$700	9/10/2012	10%
Organize members by Anniversary Month	Awards- Stephanie		9/10/2012	
Hold a Monthly Drawing at Educational meeting for all members in that month 1-10 year anniversary's	Camille/Christina		ongoing	
Give the winning anniversary member a gift Certificate	Awards		Ongoing	10%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Member Recognition- Cards for anniversaries, babies, promotions, etc.	Retention	\$50	6/30/2013	
<b>Action Plan</b>				
Send out cards to members for special happenings/occasions. Carole Astley to	Carole Astley		Ongoing	

send out the card.				
Explain to the Chairs and Board Members who will be taking lead on the cards and to let their committees know who to contact.	Lora Valdez		August	
Stock up on various greeting cards.	Carole Astley	\$50		

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Implement Member Spotlight Program- 8 Spotlited members in Publications or Social Media	Retention		6/1/2013	
<b>Action Plan</b>				
Announce the Spotlight program during registration. Members can enter their cards in a drawing to be the spotlight.	Lora Valdez		Monthly	
Draw winner at the end of the monthly meeting.	Lora Valdez		Monthly	
3 members will be Spotlited in the ORacle and on Facebook. Write up an article about the members quarterly.	Lora Valdez		Quarterly	

## 2012-2013 Monthly Education Action Plan As of August 2012

### Metric 3 Engagement/Participation

- Increase volunteers
  - 11/12 = 75                      Meet = 80                      Exceeds = 90
- Increase number of new members (1-3 years) participating
  - 11/12 = 6                      Meet = 12                      Exceeds = 16
- Increase satisfaction of education programs
  - 11/12 = 4.14                      Meet = 4.15                      Exceeds = 4.25

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Obtain an average satisfaction rating of 4.15 or higher for monthly education meetings based on the score from the program survey.	Engagement /Participation	Monthly Education	\$0	June 2013	0%

Strategy	Lead	Budget	Completion Date	% Complete
Increase speaker involvement and promotion.	Darcie LaMotte-Waage			
Action Plan	Lead	Budget	Completion Date	% Complete
Ensure <b>Learner Outcomes</b> for every speaker that can be posted on the website prior to monthly meeting.	Chanel LaChappa & Kristina Griffith Education Committee Stephanie Kennedy		Monthly	12.5%
Speaker Highlights – Create Promotional Flyer for Website and Email blasts	Chanel LaChappa & Kristina Griffith Education Committee		Monthly	25%
Circle of Excellence – Exclusive Table for designated Members to sit with Speaker. Members will be determined by Monthly Education Leads. Members will receive an ultimate takeaway related to the meeting.	Chanel LaChappa & Kristina Griffith Education Committee		Monthly	0%
Post Speaker presentations and handouts for each monthly meeting on website	Stephanie Kennedy		Monthly	
Speaker Highlights - Information posted on all social media outlets prior to Monthly Education	Chanel LaChappa &		Monthly	12.5%

monthly meeting	Kristina Griffith Education Committee Communications			
Speaker Article – each speaker to provide article for Oracle and Website	Chanel LaChappa & Kristina Griffith Education Committee Communications		Monthly	12.5%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide an exceptional, complete and meeting experience	Chanel LaChappa & Kristina Griffith Education Committee	\$0	June 2013	0%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Committee members take an active role in planning out event with venues and speakers. Encourage speakers to interact with MPI-OC before their meeting via social media and email communications				12.5%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Increase member engagement before, during and after monthly programs.	Anne Hallinan Stephanie Kennedy Board Members	\$0	June 2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Board Member to be assigned to each table and send out Monthly Announcement to attendees at the table by email after the meeting	Anne Hallinan Stephanie Kennedy Board Members		Monthly	
At Least <b>2</b> Education Committee Members to assist with Registration and answer Topic Questions	Chanel LaChappa & Kristina Griffith Education Committee		Monthly	0%
Printed Survey to be placed on all tables to encourage increase survey responses (Tim Neill is the sponsor of the printed surveys)	Stephanie Kennedy Education Committee		Monthly	
Education Committee Satisfaction Calls – committee to follow up with membership on their level of satisfaction and input. (contact members who attend less than 4 meetings a year) Calls to be made First Quarter of 2013 and reported to the Board.	Chanel LaChappa & Kristina Griffith Education Committee		April 2013	0%
Networking Activities – create at least 3 networking activities to be done prior Monthly Education	Chanel LaChappa &		November 2012	0%

to start of meeting. Prizes will be awarded.	Kristina Griffith Education Committee		February 2013 April 2013	
Submit Speaker Opportunity for WEC Meeting Madness and Encourage the chapter to vote	Chanel LaChappa & Kristina Griffith Communications		January 2013	0%
Brainiac question at monthly meetings.	Chanel LaChappa & Kristina Griffith Education Committee		Monthly	0%

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Maintain an average of 90 people at monthly meetings.	Engagement/Participation				0%

Strategy	Lead	Budget	Completion Date	% Complete
Plan and execute 8 monthly education sessions with topics chosen from member suggestions/requests.	Chanel LaChappa & Kristina Griffith	\$0	June 2013	12.5%
Action Plan	Lead	Budget	Completion Date	% Complete
Choose topics from membership requests from past survey's.				50%
Find successful speakers that have been endorsed by MPI with good reviews				25%

Strategy	Lead	Budget	Completion Date	% Complete
Association Invitations – Invite other Associations to attend MPI-OC meetings			Monthly	12.5%
Action Plan	Lead	Budget	Completion Date	% Complete
Connect with the following local Associations via, email, facebook, linkedin and ask them to distribute and promote the MPI Monthly Promotional Flyer to their members: SGMP, NACE, NW Meetings & Events Magazine, ISES, Wedding Network, GMIC, HSAMI, OSAM, and any others	Chanel LaChappa & Kristina Griffith Education Committee		Monthly	12.5%

Strategy	Lead	Budget	Completion Date	% Complete
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<b>Meeting Topics for the Year posted on the Website by November 1<sup>st</sup></b> September – Engage Hearts & Minds with Brain Friendly Meetings (Leads: Chanel LaChappa & Beth Price) October – Strategic Moves: Seizing Control of your Career (Leads: Darcie LaMotte-Waage & Cathy Mason) November –Corporate Social Responsibility (Leads: Darcie LaMotte-Waage & Kristina Griffith) December – Lawyer Panel ? (Leads: Shalia Clock & ?) January – Marketing to Different Generations & Cultures (Leads: Beth Price & ?) February – TBA April – Member Vote (Leads: Kelly Gullickson & ?) May - ? (Leads: Jina Ellison & ?)				37.5%
<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Create Education Bulk Pricing Package	Darcie LaMotte-Waage		August 2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Work with Stephanie to create a link for the Buy 3 get 1 Free Program	Darcie LaMotte-Waage & Stephanie Kennedy		July 2012	100%
Members can purchase 3 monthly meetings or satellite meetings and get 1 free until December 31, 2012			December 2012	
Goal – 20 members to purchase the Bulk Pricing Package			December 2012	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide Satellite Meetings for members not in the Portland Metro area.	Engagement/Participation	Darcie LaMotte-Waage	\$0	May 2013	
<b>Strategy</b>		<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Produce One Educational Focused Meeting in each Bend and Eugene		Cedric Rudd, Debra Jolma and David Campbell		May 2013	
<b>Action Plan</b>		<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Attendee Goal for Bend and Eugene will be 20 guests each in location				May 2013	
Send Promotions to local newspapers in each location				May 2013	
Ideas on getting membership involved in meetings ? (MPI 101 or Emerging Leaders)				May 2013	

Plans for involving Membership ????				
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**2012-2013 Special Educational Projects Action Plan  
As of August 2012**

**Metric 2 Membership Satisfaction**

11/12 Year End = 8.47

Meet = 8.5

Exceeds = 8.6

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Plan and Execute a joint annual Cascadia Educational Conference with the Washington Chapter that delivers evaluation results by attendees at a "very good" or higher overall approval rating (90% being very good)	Membership Satisfaction	Cascadia		3/31/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Repurpose tradeshow/hosted buyer into Interactive Marketplace	Cascadia		3/31/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Committee to design goals to support Interactive Marketplace			3/31/2013	
Utilize strategies successful with other events' marketplace concepts			3/31/2013	
Design specific goals for the event			3/31/2013	
Implement the new goals and changes			3/31/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Reconfigure sponsorship program and management with a goal of having every session supported	Cascadia		3/31/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Complete Sponsorship Opportunities and implement marketing Plan	Cascadia		3/31/2013	
Secure Sponsorship Chair/Lead	Cascadia		1/1/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Broaden the reach of the Cascadia brand into regions that draw from and do business in the Pacific Northwest	Cascadia		3/31/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Build on the existing Marketing Plan neighboring state Chapters	Cascadia		3/31/2013	
Social Media, E-Blasts to All Chapters	Cascadia		3/31/2013	25%
Press Releases to All Industry Publications	Cascadia		3/31/2013	10%

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Manage Steering Committee, CEC Planning Team and sub-committees as required	Cascadia		3/31/2013	Ongoing -
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Conduct weekly, bi-weekly calls	Cascadia		3/31/2013	Ongoing -
Provide ongoing updates	Cascadia		3/31/2013	Ongoing – Using Skydrive

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Develop conference schedule to include at least 10 hours of education	Cascadia		3/31/2013	75%
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Secure appropriate speakers and contract the speakers	Cascadia	\$15,000	3/31/2013	30%
Have speakers provide bios, session descriptions, photos for marketing of event	Cascadia		3/31/2013	
Encourage Speakers to provide additional marketing tools – video, etc	Cascadia		3/31/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Implement CEC succession plan	Cascadia		3/31/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Education Co-Chairs to be included in all Steering Committee Calls	Cascadia		3/31/2013	
Education Co-Chairs to be included in all planning and correspondence	Cascadia		3/31/2013	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Enroll 6 people in the CMP Study Group Program and insure study group materials are updated	Member Satisfaction	Professional Development		6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Conduct two (2) CMP/CMM information sessions in 2012-2013 pre/or/post Monthly Educational meetings	Professional Development		06/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
September and Month TBD as CMP Information sessions.	Kathleen O'Connor		02/13/2013	
Have 2-3 CMP/CMM's speak at the Information Sessions	KOC		02/13/2013	
Provide ongoing information on recertification steps through Oracle and the information sessions	KOC		05/13/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Review Study Group Materials and insure they are updated	Professional Development			
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Review all Study Group Materials submitted by CIC as a committee	KOC		09/15/2012	
Implement plan and curriculum for the Study Group	KOC		09/15/2012	

Propose \$50 Fee for CMP Study Group for more commitment and dedication to Study Group	KOC		09/15/2012	
Review and Recap at year-end	KOC		04/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide education/information/awareness of needed maintenance/tracking to maintain existing certifications for renewal	Professional Development			
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Submit information in each Oracle per submission deadline	KOC		06/30/2013	
Provide information on this at the information sessions	KOC		06/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide more visibility and education in Oracle and other means on the CMM program	Professional Development			
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Submit information in each Oracle per submission deadline	KOC		06/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Add experience and support to the existing Committee	Professional Development			
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Add 1-2 Co-Chairs	KOC		8/31/2012	100%
Add NEW CMP to Committee at year-start that completed program earlier	KOC		9/1/2012	

Objective	Connected to what Metric?	Lead	Budget	Completion Date	% Complete
Continue the Emerging Leaders Program	Membership Satisfaction	Professional Development/ Midge Dobbs		6/30/2013	

Strategy	Lead	Budget	Completion Date	% Complete
Execute four (4) quarterly emerging leader programs	Professional Development/ Midge Dobbs		6/30/2013	
Action Plan	Lead	Budget	Completion Date	% Complete
Develop four topics appropriate for emerging leaders <i>Midge &amp; Cathy met to review the plan for the year. Midge is working with Cathy to come up with education topics and then Cathy and her team will execute the details. November's program is looking like it will be a continuation of the monthly meeting speaker as it correlates with the topic. Midge to get Cathy potential topics for the other programs.</i>	Professional Development/ Midge Dobbs			25%
Determine the four (4) appropriate months to implement in conjunction with the Chapter Meetings: 10:30am – 11:30am Suggested <i>November, January, March and May programs</i>	Professional Development/ Midge Dobbs			100%
Market the Program in Chapter respective e-blasts and chapter communications <i>Once topics are determined Cathy will get the details of the programs to Communications and Stephanie for marketing.</i>	Professional Development/ Midge Dobbs			
Determine the presenters for the four (4) programs	Professional Development/ Midge Dobbs			

Strategy	Lead	Budget	Completion Date	% Complete
Continue to develop mentor program	Professional Development/ Midge Dobbs		6/30/2013	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Determine volunteers to help design the mentor program	Professional Development/ Midge Dobbs			
Develop the mentor program <i>Mentor program has been developed, it will be a continuation of last years program that Cindy Wallace developed.</i>	Professional Development/ Midge Dobbs			100%
Communicate the mentor program through the Chapter Communication channels <i>Target date for this is October to push before November Emerging Leaders</i>	Professional Development/ Midge Dobbs		10/15/12	
Execute and evaluate for future the Mentor Program	Professional Development/ Midge Dobbs		6/30/13	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Produce a Planner Think Tank	Membership Satisfaction	Alex Doyle	\$150	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Incorporate a mini-Planner think-tank at social events/satellite programs prior to or immediately after event.	Alex Doyle			
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Send RFP to facilities who may want host Planner Think Tank	Alex Doyle	0	10/15/2012	
Recruit 2 additional Planners to assist with Planner Think Tank Committee	Alex Doyle	0	10/1/2012	
Develop Theme with Planner Think Committee	Alex Doyle	0	11/1/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Engage and interact with planners throughout the year and develop an ongoing planner forum/communication	Planner Think Tank	0	6/30/2013	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Set up schedule of e-Blasts to MPI-OC Chapter	Alex Doyle	0	10/15/2012	
Engage Social Media to keep Planners informed on Planner Think Tank	Alex Doyle	0	Ongoing	
Develop article for Oracle on Planner Think Tank	Alex Doyle	0	9/15/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Produce a Planner Case Study: Best practices Story in each Oracle	Planner Think Tank	0	11/1/2012	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Set up regular monthly meetings/conf. calls with PTT Committee	Alex Doyle	0	10/15/2012	
Planner Case Study to be completed	PTT Committee	0	12/15/2012	
Survey other Planners on Case Study	PTT Committee	0	11/1/2012	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Actively engage the planners through the year	Membership Satisfaction	Planner Think Tank	0	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Incorporate a mini-Planner think-tank at social events/satellite programs prior to or immediately after event.	Planner Think Tank	0	Ongoing	

<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion</b>	<b>% Complete</b>
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			Date	
Engage and interact with planners throughout the year and develop an ongoing planner forum/communication	Planner Think Tank	0	Ongoing	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Use of Social Media	PTT Committee	0	Ongoing	
Regular conf. calls with Planners	PTT Committee	0	Ongoing	
Solicit ideas from Planners on best forms of communication	PTT Committee	0	Ongoing	
Include use of MPI-OC website to engage with Planners	PTT Committee	0	Ongoing	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Produce a Planner Case Study: Best practices Story in each Oracle	Planner Think Tank	0	6/30/2013	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Use notes from PTT to develop Best Practices Article for ORacle	PTT Committee	0	6/30/2013	

<b>Objective</b>	<b>Connected to what Metric?</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Produce a Professional Development Program – an extended Education Day	Membership Satisfaction	Professional Development	\$2,890	6/30/2013	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Execute Professional Development Conference in October 2012	Professional Development		10/31/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Ted-Style Format for topics with up to 4-5 speakers. Secure format and	Kavinda		09/01/2012	

speakers	Arthenayake			
Market the event through Chapter Marketing Plan dates	Kavinda Arthenayake		10/30/2012	

<b>Strategy</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Provide specific take-aways from the event which provide ROI post event	Professional Development		10/30/2012	
<b>Action Plan</b>	<b>Lead</b>	<b>Budget</b>	<b>Completion Date</b>	<b>% Complete</b>
Recruited speakers must provide the key takeaways in a clear format prior to being secured	Kavinda Arthenayake		10/30/2012	
Specific take-aways repeatedly communicated in the pre-marketing of event	Kavinda Arthenayake		10/30/2012	
Each presenter reviews key points at their session end	Kavinda Arthenayake		10/30/2012	
Whiteboard or visible display of takeaways throughout event	Kavinda Arthenayake		10/30/2012	

# Cascadia Educational Conference

August Planning 2013



## TSR REPORT

- Theme:
  - The original theme of Celebrate was a great theme, but had a broad meeting and didn't connect with all aspects of the educational conference.
  - A new theme has been developed of Grow! This theme encompasses the growth that occurs in networking, educational breakouts and during hosted buyer. This theme will be tied into various aspects of the conference and marketing including the décor of the general session.
    - Grow your education
    - Grow your network
    - Grow your business
- Transitions:
  - Maya Aho has accepted the WA Vice Chair position. She has already had calls with the education committee and is working with OR Vice Chair, Kristina on planning the speakers.
  - Eric Kingstad no longer has time to dedicate to technology, Jina and Moira have picked up where he left off and started the planning process for technology.
- Volunteers:
  - Jina and Moira are both recruiting volunteers for the committees. Below is a list of the new recruits for this month:
    - Maya Aho with Hotel 1000 has agreed to WA Vice Chair
    - Birgitte Simmons with WCVA has agreed to be on the education committee- OR
    - Chanel LaChappa with Travel Portland has agreed to sign back on as Marketing Chair- OR
    - Sarah Carter with The Fairmont Olympic Hotel has agreed to serve on the Marketing committee- WA
    - Katie Werner with Sunriver Resort has agreed to serve as Tradeshow/ Hosted Buyer Chair- OR
    - Kate Henry with Bravo has agreed to serve on the Tradeshow/Hosted Buyer committee- OR

- Nash Fung, a Seattle Magician, has agreed to serve on the Tradeshow/Hosted Buyer committee- WA
  - Volunteers still needed: Marketing committee members, Sponsorship committee members, Silent Auction committee members, Technology committee members
- Technology:
  - RFP's are going out to both WA and OR membership for website and mobile app. Jina and Moira have a few options already for website and the mobile app if no membership submits a proposal.
- Education:
  - Education keynotes and breakouts are being laid out. The now fully staffed and working committee is making decisions on breakout topics and where keynotes will be placed. They have asked to be able to lay out everything before signing contracts to ensure they are stretching the budget with the best possible choices. Here is what they are looking at right now:
    - Breakouts: Ruth Greg (Emergency Preparedness), Greg Duff (Contracts + Privacy), Ashley Stevens ( Social Media + Marketing)
    - Keynotes: Kristin Lindeen ( Question Behind the Question), Tyson Wooters ( Keep Your Head)
- Marketing:
  - Posts have been made on facebook with a call-out for volunteers. A survey post has also been made tying in the Grow! theme and asking what attendees are most interested in learning about for the education committee to use in their planning.
  - A marketing schedule has been created:

*August* – Save the date for the Cascadia 2012 Conference

*September* – Promote save the date, postcards at the NW Events Show and Bravo Show.

*October* – Promote social media as a way to connect with everything Cascadia. Promote hosted buyer program

*November* – Promote education and guest speakers to get people excited about the sessions. Promote social media [perhaps run promotion on social media that could get membership involved]. Promote hosted buyer to planners.

*December* – Promote pre-conference activities and registration open. Promote silent auction donations. Continue to promote social media and hosted buyer sign-ups.

*January* – Promote networking and education opportunities at the conference. Continue to promote hosted buyer, last minute registrations, silent auction donations and sponsorships. Create press release to send to industry associations and magazines.

*February* – Promote gala on final night and registration with hosted buyer. Continue to promote social media and sponsorships. Run promotion for last minutes registrations.

*March* – Recap of this year. Promote next year's conference

- Cascadia Logo:
  - Logo has been approved. The original logo format is something we need to get from previous chair. If we can't get original we will have one created and get it approved.
- Hosted Buyer/ Tradeshow:
  - Working on Facetime sponsorship to match supplier and planners.
- Sponsorship:
  - Jina and Moira have decided with feedback from the steering committee to not pursue a commissioned sponsorship position. This position will be volunteer filled.
  - Sponsorship Plan:
    - September-mid November: Secure trade sponsorships such as those that would be offering a service that we need.
    - Mid October- Mid December: Secure previous sponsors from past years.
    - November- February: Prospect and secure new sponsorships.
- Pre-Conference:
  - Working on the build-a-bike brunch on Sunday morning and the Saturday night dinner.

GOALS for September:

-Secure website designer

-Create postcards for save the date

-Secure FaceTime sponsor

-Fill all committees

- Pre-conference activities schedule