

**2016-2017 CHAPTER BUSINESS PLAN FINAL**  
**(as of 6-30-16)**

**METRIC 1: Retention**

2015-2016 Year-End Actual:		74.34% As of 6/28/16	Above Region Average & Maintains (2pts)	(2015-2016 Region average 71.82% All)	Above Region Average & Increases by ½% or more (3pts) Below Region Average .1-1% = 1 Point .1-2% = 2 Points 2.1 or Higher = 3 Points			
Item	Description	Metric	Owner (Who is responsible?)	Committee	Budget		Completion Date (No Later than)	Stage to Completion (e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)
					Expense	Revenue		
<b>Objective 1.1</b>	<b>Maintain a minimum of 75% retention</b>	<b>1</b>	<b>Director, Membership</b>	<b>Retention</b>			<b>6/30/17</b>	<b>0%</b>
Action 1.1.1	Committee members will execute monthly "Member ROI" calls and report results monthly to the VP Membership	1	Director, Membership	Retention			6/30/17	0%
Action 1.1.2	Ensure there are membership ambassadors to meet, network & engage with new members at all Professional Education Programs (PEP) and Professional Breakfast Programs (PBP).	1	Director, Membership	Retention			06/30/17	0%
<b>Objective 1.2</b>	<b>Offer a minimum of 1 WEC and 1 CMP U scholarship</b>	<b>1</b>	<b>Director, Membership</b>	<b>Awards &amp; Recognition</b>			<b>06/30/17</b>	<b>0%</b>
Action 1.2.1	Distribute a minimum of 2 marketing email blasts for each (WEC/CMP U)	1	Director, Membership	Awards & Recognition			5/31/17	0%
<b>Objective 1.3</b>	<b>Present a minimum of 4 MPQ awards, plus a minimum of four (4) annual awards</b>	<b>1</b>	<b>Director, Membership</b>	<b>Awards &amp; Recognition</b>			<b>06/30/17</b>	<b>0%</b>
Action 1.3.1	Distribute a quarterly call for nominations email for MPQ	1	Director, Membership	Awards & Recognition			5/31/17	0%
Action 1.3.2	Distribute a call for nominations email for the annual awards	1	Director, Membership	Awards & Recognition			4/30/17	0%

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					Expense	Revenue		
<b>Objective 1.4</b>	<b>Create networking opportunities for members to engage at all PEPs</b>	<b>1</b>	<b>Director, Membership</b>	<b>Retention</b>			<b>06/30/17</b>	<b>0%</b>
Action 1.4.1	Implement networking icebreakers at all PEPs	1	Director, Membership	Retention			06/30/17	0%
<b>Objective 1.5</b>	<b>Execute a Chapter Engagement Program at all Professional Education Programs (PEP)</b>	<b>1</b>	<b>Director, Membership</b>	<b>Retention</b>			<b>06/30/17</b>	<b>0%</b>
Action 1.5.1	Convert a minimum of 10 engagement participants to volunteers.	1	Director, Membership	Retention			06/30/17	0%

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**METRIC 2: Recruitment**

<b>2014-2015 Year-End Actual:</b>		<b>873 as of 6/28/16</b>	<b>1% of Growth Over Year-End (1pt)</b>	<b>882</b>	<b>2% of Growth Over Year-End (2pts) Over 2% of Growth Over Year End (3pts)</b>	<b>890</b>	<b>899 (3% growth)</b>	
Item	Description	Metric	Owner (Who is responsible?)	Committee	Budget		Completion Date (No Later than)	Stage to Completion (e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)
					Expense	Revenue		
<b>Objective 2.1</b>	<b>Recruit a total of 225 new members for a net increase of 2% year over year</b>	<b>2</b>	<b>Director, Membership</b>	<b>Recruitment</b>			<b>6/30/17</b>	<b>0%</b>
Action 2.1.1	Host membership table at all Professional Education Programs (PEP) and Professional Breakfast Programs (PBP).	2	Director, Membership	Recruitment			6/30/17	0%
Action 2.1.2	Ensure there are membership hosts to meet, network & engage with non-members at all Professional Education Programs (PEP) and Professional Breakfast Programs (PBP).	2	Director, Membership	Recruitment			06/30/17	0%
Action 2.1.3	Execute a minimum of one (1) Nothing But Networking event	2	Director, Membership	Recruitment			06/30/17	0%
Action 2.1.4	Collaborate with other industry organizations to create a minimum of one (1) combined networking event	2	Director, Membership	Recruitment			06/30/17	0%

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					Expense	Revenue		
<b>Objective 2.2</b>	<b>Promote MPI at least 4 times via Social Media directed to Emerging Professionals audience</b>	<b>2</b>	<b>Director, Leadership Development</b>	<b>Emerging Professionals</b>			<b>6/30/17</b>	<b>0%</b>
	Action 2.2.1 No Actions Listed							
<b>Objective 2.3</b>	<b>Host a minimum of three (3) Emerging Professionals focused events with a minimum attendance of 25 attendees at each event.</b>	<b>2</b>	<b>Director, Leadership Development</b>	<b>Emerging Professionals</b>			<b>6/30/17</b>	<b>0%</b>
	Action 2.3.1 No Actions Listed							
<b>Objective 2.4</b>	<b>Develop "Mentor-An-Emerging Professional" Program.</b>	<b>2</b>	<b>Director, Leadership Development</b>	<b>Emerging Professionals</b>			<b>08/31/16</b>	<b>0%</b>
	Action 2.4.1 Recruit 42 Mentors to assign to student members							0%

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**METRIC 3: MEMBER SATISFACTION – Overall Chapter Satisfaction Score**

Previous Score:	<b>8.38%</b>	Meets Score:	<b>7.90%</b>	Exceed Score:	<b>8.00%</b>
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Item	Description	Metric	Owner (Who is responsible?)	Committee	Budget		Completion Date (No Later than)	Stage to Completion (e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)
					Expense	Revenue		
<b>Objective 3.1</b>	<b>Increase number of Board of Directors Applications by 15%</b>	<b>3</b>	<b>Immediate Past President</b>	<b>Nominations</b>			<b>01/31/17</b>	<b>0%</b>
Action 3.1.1	No Actions Listed	3						
<b>Objective 3.2</b>	<b>Achieve a minimum attendance of 300 at Gala</b>	<b>3</b>	<b>Director, Special Events</b>	<b>Gala</b>			<b>06/30/17</b>	<b>0%</b>
Action 3.2.1	Secure an inspirational and unique venue to drive attendance in line with the MPINCC annual theme	3	Director, Special Events	Gala			02/15/17	0%
Action 3.2.2	Create an effective event marketing plan to achieve the attendance objective	3	Director, Special Events	Gala			03/15/17	0%
<b>Objective 3.3</b>	<b>Publish and distribute four (4) issues of MPINCC's award-winning <i>Perspective</i> magazine</b>	<b>3</b>	<b>VP Communications</b>	<b><i>Perspective</i></b>			<b>06/30/17</b>	<b>0%</b>
Action 3.3.1	Develop timeline to promote four (4) issues with a minimum of two (2) key articles to speak to chapter membership and industry professionals.	3	VP Communications	<i>Perspective</i>			8/30/16	0%
Action 3.3.2	Solicit one (1) unique sponsorship/partnership for 2016-2017 advertising year.	3	VP Communications	<i>Perspective</i>			06/30/17	0%
<b>Objective 3.4</b>	<b>Plan and execute six (6) Educational Programs with an average cumulative score of 4.5</b>	<b>3</b>	<b>Director, Education</b>	<b>Programs</b>			<b>6/30/17</b>	<b>0%</b>
Action 3.4.1	Execute a minimum of one (1) education program in South Bay/Silicon Valley	3	Director, Education	Programs			6/30/17	0%

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					Expense	Revenue		
<b>Objective 3.5</b>	<b>Plan and execute Annual Conference and Expo (ACE) Education with an overall score (avg.) of 5.0</b>	<b>3</b>	<b>Director, Education</b>	<b>ACE Education</b>			<b>3/30/17</b>	<b>0%</b>
Action 3.5.1	Execute at least ten (10) total educational sessions at ACE.	3	Director, Education	ACE Education			3/30/17	%
Action 3.5.2	Execute one (1) MPI Academy certificate program in conjunction with ACE	3	Director, Education	ACE Education			3/30/17	%
<b>Objective 3.6</b>	<b>Plan &amp; execute four (4) community outreach activities, working with local organizations.</b>	<b>3</b>	<b>Director, Marketing</b>	<b>Community Involvement</b>			<b>06/30/17</b>	<b>0%</b>
Action 3.6.1	Identify dates and local organizations	3	Director, Marketing	Community Involvement			8/15/16	0%
Action 3.6.2	Promote activity to chapter membership and the community	3	Director, Marketing	Community Involvement			9/30/16	0%
Action 3.6.3	Tweet a minimum of two (2) tweets per activity	3	Director, Marketing	Community Involvement			06/30/17	0%
Action 3.6.4	Publish a minimum of one (1) press release per activity, including photos	3	Director, Marketing	Community Involvement			06/30/17	0%
Action 3.6.5	Publish a minimum of one (1) photo on Facebook	3	Director, Marketing	Community Involvement			06/30/17	0%
<b>Objective 3.7</b>	<b>Plan and execute CMP University with updated licensed content achieving a minimum satisfaction score of 5.65.</b>	<b>3</b>	<b>Director, Education</b>	<b>CMP/CMM</b>			<b>06/30/17</b>	<b>0%</b>
Action 3.7.1	Conduct evaluation of new course program materials and update based on those results	3	Director, Education	CMP/CMM			06/30/17	0%

**Metrics:** #1: Retention #2: Recruitment #3: Member Satisfaction #4: Volunteer Engagement #5: Financial Management

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<b>Item</b>	<b>Description</b>	<b>Metric</b>	<b>Owner (Who is responsible?)</b>	<b>Committee</b>	<b>Budget</b>	<b>Completion Date (No Later than)</b>	<b>Stage to Completion (e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)</b>
Action 3.7.2	Work with MPI Global regarding the licensing/purchase of MPINCC CMP U course material for distribution	3	Director, Education	CMP/CMM		06/30/17	0%
<b>Objective 3.8</b>	<b>Deliver one (1) CMP recertification workshop (at ACE)</b>	<b>3</b>	<b>Director, Education</b>	<b>CMP/CMM</b>		<b>3/30/17</b>	<b>0%</b>
Action 3.8.1	No Actions Listed						
<b>Objective 3.9</b>	<b>To have MPI Northern California Chapter be recognized as <i>the Voice of the meetings industry in the state of California.</i></b>	<b>3</b>	<b>Director, Marketing</b>	<b>Marketing</b>		<b>6/30/17</b>	<b>0%</b>
Action 3.9.1	Create a MarCom strategic plan identifying target market, message (product) and benefits (value) to chapter members and industry professionals.	3	Director, Marketing	Marketing		8/31/16	0%
Action 3.9.2	Complete the MarCom Calendar to work with each committee for events and promotion of their specific needs.	3	Director, Marketing	Marketing		9/15/16	0%
Action 3.9.3	Work with the Office of the President to engage 3-5 new committee members and start building a succession plan for 2017-2018.	3	Director, Marketing	Marketing		8/31/16	0%
Action 3.9.4	Work with the Executive Director and office staff to insure all chapter correspondence is in compliance with MPI logo standards, AP Style Manual, English grammar, spelling, and contains the consistent message of MPINCC. (ongoing)	3	Director, Marketing	Marketing		6/30/17	0%

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Action 3.9.5	Increase social media activity a minimum of 5% over April 2016 figures on Twitter, Facebook, and LinkedIn platforms.  Social media channels (as of 4/12/2016): Twitter followers: 3,241 Facebook likes: 889 LinkedIn members: 1,604	3	Director, Marketing	Marketing		6/30/17	0%
Action 3.9.6	Incorporate Instagram as a new platform for 2016-2017 and gain a minimum of 100 Likes/Comments/Followers.	3	Director, Marketing	Marketing		6/30/17	0%
Action 3.9.7	Post a minimum of twenty (20) times per month	3	Director, Marketing	Marketing		6/30/17	0%
Action 3.9.8	Work with PR Agency on a project basis to gain exposure of MPINCC for key events to include ACE 2017 and Awards Gala.	3	Director, Marketing	Marketing		6/30/17	0%
<b>Objective 3.10</b>	<b>Execute a minimum of two (2) Foundation awareness opportunities among Chapter members</b>	<b>3</b>	<b>IPP</b>	<b>Foundation Liaison</b>		<b>6/30/17</b>	<b>0%</b>
Action 3.10.1	No actions listed						



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**METRIC 4: Volunteer Engagement**

<b>Year-End Actual:</b> 1. 20-25% of Members Volunteering = 1 Point 2. 26-30% of Members Volunteering = 2 Points 3. 31% or Above of Members Volunteering =3Point	<b>145</b>	<b>Meets Score:</b> <b>Calculation:</b> Volunteer Engagement Number Divided by Current Membership Number = % of Member Engagement	<b>16.6%</b>	<b>Exceeds Score:</b>	<b>20%</b>
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Item	Description	Metric	Owner (Who is responsible?)	Committee	Budget		Completion Date (No Later than)	Stage to Completion <small>(e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)</small>
					Expense	Revenue		
<b>Objective 4.1</b>	<b>Maintain volunteer involvement in MPINCC at 145 volunteers.</b>	<b>4</b>	<b>Director, Leadership Development</b>	<b>Volunteer Development</b>			<b>6/30/17</b>	<b>0%</b>
Action 4.1.1	All interested volunteers contacted within three weeks of submitting online volunteer request form	4	Director, Leadership Development	Volunteer Development			6/30/17	0%
Action 4.1.2	Complete one (1) check-in with all new volunteers to gauge satisfaction and engagement.	4	Director, Leadership Development	Volunteer Development			6/30/17	0%
<b>Objective 4.2</b>	Deliver 1 Committee Trade Show to recruit volunteers	4	Director, Leadership Development	Volunteer Development			6/30/17	0%
Action 4.2.1	No Actions Listed							
<b>Objective 4.3</b>	Complete one (1) check in with Committee Chairs and Co-Chairs	4	Director, Leadership Development	Volunteer Development			6/30/17	0%
Action 4.3.1	No Actions Listed							
<b>Objective 4.4</b>	Provide access to the online Volunteer Interest Form at the membership table at all Professional Education Programs (PEP)	4	Director, Leadership Development	Volunteer Development			6/30/17	0%

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Action 4.4.1	No Actions Listed						
<b>Objective 4.5</b>	Execute a minimum of one (1) engagement opportunity for Past Presidents	4	Immediate Past President	Past Presidents Council		06/30/17	0%
Action 4.5.1	No Actions Listed						

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**METRIC 5: FINANCIAL MANAGEMENT** [Calculated on Gross Margin and Based on Submitted Budget for Fiscal Term]

<b>Previous Year's Actuals: 15.39% as of 6/22/15</b>	1. Year-End Gross Margin is 1-5% = 1 Point 2. Year-End Gross Margin is 5.1-10% = 2 Points 3. Year-End Gross Margin is 10.1% or above = 3 Points	<b>Gross Margin %</b>	<b>Calculation:</b> Total Revenue Minus Total Expenses Divided by Total Revenue = Gross Margin %
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Item	Description	Metric	Owner (Who is responsible?)	Committee	Budget		Completion Date (No Later than)	Stage to Completion (e.g., 10%, 25%, 50%, etc. - For Use at Mid-Year Retreat)
					Expense	Revenue		
<b>Objective 5.1</b>	<b>Plan Corks &amp; Forks to achieve a profit of \$3400 (and charity contribution of \$1700)</b>	<b>5</b>	<b>Director, Special Events</b>	<b>Corks &amp; Forks</b>			<b>2/28/17</b>	<b>0%</b>
Action 5.1.1	Secure cash sponsorships of at least \$5,500	5	Director, Special Events	Corks & Forks			2/28/17	0%
Action 5.1.2	Achieve attendance of at least 200	5	Director, Special Events	Corks & Forks			2/28/17	0%
<b>Objective 5.2</b>	<b>Execute Thanks for Giving to achieve a net profit of at least \$4,500</b>	<b>5</b>	<b>Director of Special Events</b>	<b>Thanks for Giving</b>			<b>11/30/16</b>	<b>0%</b>
Action 5.2.1	Secure a unique location by Sept. 30 and partner with member vendors to provide services which achieve the profit objectives	5	Director, Special Events	Thanks for Giving			11/30/16	0%
Action 5.2.2	Achieve a minimum attendance of 275	5	Director, Special Events	Thanks for Giving			11/30/16	0%
<b>Objective 5.3</b>	<b>Achieve a profit of \$185,000 for Annual Conference &amp; Expo (ACE)</b>	<b>5</b>	<b>Director, Special Events</b>	<b>Annual Conference &amp; Expo (ACE)</b>			<b>3/31/17</b>	<b>0%</b>
Action 5.3.1	Secure 400 planner registrations	5	Director, Special Events	ACE			3/31/17	0%
Action 5.3.2	Raise \$35,500 in cash sponsorships for ACE	5	Director, Special Events	ACE			3/31/17	0%

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					Expense	Revenue		
<b>Objective 5.4</b>	<b>Achieve \$50,000 in cash sponsorships for 2016-2017 program year</b>	<b>5</b>	<b>Director, Fundraising/ Sponsorship</b>	<b>Sponsorship</b>			<b>06/30/17</b>	<b>0%</b>
Action 5.4.1	Manage raffles at all Professional Education Programs	5	Director, Fundraising/ Sponsorship	Sponsorship			06/30/17	0%
<b>Objective 5.5</b>	<b>Achieve \$10,500 in cash sponsorships for August, January &amp; May Professional Education Programs (PEP) for the 2016-2017 program year</b>	<b>5</b>	<b>Director, Fundraising/ Sponsorship</b>	<b>Sponsorship</b>			<b>06/30/17</b>	<b>0%</b>
Action 5.5.1	No Actions Listed							
<b>Objective 5.6</b>	<b>Net a total of \$18,000 from: 1) Thanks for Giving Raffle &amp; 2) Gala Auction</b>	<b>5</b>	<b>Director, Fundraising/ Sponsorship</b>	<b>Auctions</b>			<b>06/30/17</b>	<b>0%</b>
Action 5.6.1	No Actions Listed							