

**2017-2018 CHAPTER BUSINESS PLAN FINAL**  
**(as of 6-14-17)**

**METRIC 1: Retention**

| 2015-2016 Year-End Actual: |  | 74.34%<br>As of<br>6/28/16 | Above Region Average & Maintains (2pts) | (2015-2016 Region average 71.82% All) | Above Region Average & Increases by ½% or more (3pts)<br>Below Region Average<br>.1-1% = 1 Point<br>.1-2% = 2 Points<br>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>6/30/18</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                             |  |         | 6/30/18                         | 0%  |
| Action 1.1.2               | Develop and implement Strategic On-boarding for New members  | 1                          | Director, Membership                    | Retention                             |  |         | 6/30/18                         | 0%  |
| Action 1.1.3               | Develop and implement length of service recognition pins and/or ribbon program   | 1                          | Director, Membership                    | Retention                             |  |         | 6/30/18                         | 0%  |
| Action 1.1.4               | Ensure there are membership ambassadors to meet, network & engage with new members at all Short and Long Professional Education Programs | 1                          | Director, Membership                    | Retention                             |  |         | 06/30/18                        | 0%  |
| <b>Objective 1.2</b>       | <b>Offer 1 WEC and 1 CMP U scholarship</b>   | <b>1</b>                   | <b>Director, Leadership Development</b> | <b>Awards &amp; Recognition</b>       |  |         | <b>06/30/18</b>                 | <b>0%</b>   |
| Action 1.2.1               | Distribute a minimum of 2 marketing email blasts for each (WEC/CMP U)  | 1                          | Director, Leadership Development        | Awards & Recognition                  |  |         | 5/31/18                         | 0%  |
|                            |  |                            |   |                                       |  |         |                                 |   |

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|----------------------|--|----------|----------------------------------|---------------------------------|---------|---------|------------------------------------|--|
|                      |  |          |                                  |                                 | Expense | Revenue |                                    |  |
| <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>06/30/18</b>                    | <b>0%</b>  |
| Action 1.3.1         | Distribute a quarterly call for nominations email for MPQ  | 1        | Director, Leadership Development | Awards & Recognition            |         |         | 5/31/18                            | 0%   |
| Action 1.3.2         | Distribute a call for nominations email for the annual awards  | 1        | Director, Leadership Development | Awards & Recognition            |         |         | 4/30/18                            | 0%   |
| <b>Objective 1.4</b> | <b>Establish and, in conjunction with the A&amp;R Committee, oversee execution of the inaugural IGNITE Award (Igniting Innovation Through Excellence), an annual award to recognize the best and brightest meeting and/or event of our members unrelated to volunteer service.</b> | <b>1</b> | <b>Immediate Past President</b>  | <b>Awards &amp; Recognition</b> |         |         | <b>06/30/18</b>                    | <b>0%</b>  |
| Action 1.4.1         | No action listed.  | 1        |                                  |                                 |         |         |                                    |  |
| <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>06/30/18</b>                    | <b>0%</b>  |
| Action 1.4.1         | Implement networking icebreakers at all PEPs   | 1        | Director, Membership             | Retention                       |         |         | 06/30/18                           | 0%   |
| <b>Objective 1.5</b> | <b>Execute a Chapter Engagement Program at Professional Education Programs</b>   | <b>1</b> | <b>Director, Membership</b>      | <b>Retention</b>                |         |         | <b>06/30/18</b>                    | <b>0%</b>  |
| Action 1.5.1         | Convert a minimum of 20% engagement participants to volunteers or new members.   | 1        | Director, Membership             | Retention                       |         |         | 06/30/18                           | 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)<br/>Over 2% of Growth Over Year End (3pts)</b> | <b>890</b> | <b>899 (3% growth)</b>             |  |
|-----------------------------------|--|--------------------------|---|--------------------|---|------------|------------------------------------|--|
| Item                              | Description  | Metric                   | Owner<br>(Who is responsible?)          | Committee          | Budget  |            | Completion Date<br>(No Later than) | Stage to Completion<br>(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>6/30/18</b>                     | <b>0%</b>  |
| Action 2.1.1                      | Host a Membership table at four events throughout the year to promote membership drives  | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |
| Action 2.1.2                      | Develop an MPI Membership Ambassador Program with Why MPINCC? Pins made up of two Recruitment and two Retention committee members. Ensure at least one is available at all functions | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |
| Action 2.1.3                      | Execute one (1) Nothing But Networking event and participate and promote (1) GMID event.   | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |
| Action 2.1.4                      | Host two membership recruitment drives. One leading up to the Holiday Event and one leading up to ACE. Host Membership tables at each event.   | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |
| Action 2.1.5                      | Institute a Refer a Friend Card program and launch at the August meeting.  | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |
| Action 2.1.6                      | Institute a special non-member code for free attendance at select events (October Education Program and Culinary Event) for each board member to invite one potential new member.    | 2                        | Director, Membership                    | Recruitment        |   |            | 6/30/18                            | 0%   |

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|----------------------|--|----------|--------------------------------|-------------------------------|---------|---------|------------------------------------|--|
|                      |  |          |                                |                               | Expense | Revenue |                                    |  |
| <b>Objective 2.2</b> | <b>Redefine and Engage Emerging Professional - students and new professionals (1-3 years)</b>  | <b>2</b> | <b>Director, Membership</b>    | <b>Emerging Professionals</b> |         |         | <b>6/30/18</b>                     | <b>0%</b>  |
| Action 2.2.1         | Host a minimum of three (3) Emerging Professionals focused events, including campus events and/or ACE with a minimum attendance of 25 attendees at each event. | 2        | Director, Membership           | Emerging Professionals        |         |         | 6/30/18                            | 0%   |
| Action 2.2.2         | Promote MPI at least 4 times via Social Media directed to Emerging Professionals audience  | 2        | Director, Membership           | Emerging Professionals        |         |         | 6/30/18                            | 0%   |
| <b>Objective 2.3</b> | <b>Improve "Mentor-An-Emerging Professional" Program</b>   | <b>2</b> | <b>Director, Membership</b>    | <b>Emerging Professionals</b> |         |         | <b>06/30/18</b>                    | <b>0%</b>  |
| Action 2.3.1         | Recruit 20 Mentors and 20 Mentees to assign to interested members  | 2        | Director, Membership           | Emerging Professionals        |         |         | 6/30/18                            | 0%   |
| Action 2.3.1         | Create awareness of Mentor program to members utilizing social media, promotion at events, and member outreach   | 2        | Director, Membership           | Emerging Professionals        |         |         | 6/30/18                            | 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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|----------------------|---|----------|---------------------------------|---------------------------------|---------|---------|------------------------------------|--|
|                      |   |          |                                 |                                 | Expense | Revenue |                                    |  |
| <b>Objective 3.1</b> | <b>Increase number of Board of Directors Applications by 15% (25 applicants)</b>  | <b>3</b> | <b>Immediate Past President</b> | <b>Nominations</b>              |         |         | <b>01/31/18</b>                    | <b>0%</b>  |
| Action 3.1.1         | Contact a minimum of 35 volunteers, as identified by the Leadership Development Department, with a personal call-to-action to apply for the Board.                                | 3        | Immediate Past President        | Nominations                     |         |         | 01/31/18                           | 0%   |
| <b>Objective 3.2</b> | <b>Create an event that recognizes the achievements to the chapter/industry of our members, to validate the installation of incoming board and appreciation of outgoing board</b> | <b>3</b> | <b>Director, Special Events</b> | <b>Recognition Event (Gala)</b> |         |         | <b>06/30/18</b>                    | <b>0%</b>  |
| Action 3.2.1         | Incorporate photos of the event for future use on website and promotional materials.  | 3        | Director, Special Events        | Recognition Event (Gala)        |         |         | 06/30/18                           | 0%   |
| Action 3.2.2         | Create an effective event marketing plan to achieve the objectives for the event.   | 3        | Director, Special Events        | Recognition Event (Gala)        |         |         | 06/30/18                           | 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>Director, Marketing</b>      | <b><i>Perspective</i></b>       |         |         | <b>06/30/18</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        | Director, Marketing             | <i>Perspective</i>              |         |         | 6/30/18                            | 0%   |

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|----------------------|--|---------------|---|------------------------------|---------------|--|--|
| <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>6/30/18</b>                             | <b>0%</b>  |
| Action 3.4.1         | Execute a minimum of one (1) education program on a corporate campus.                                  | 3             | Director, Education                     | Programs                     |               | 6/30/18                                    | 0%   |
| Action 3.4.2         | Offer an experiential, alternative learning format program.  | 3             | Director, Education                     | Programs                     |               | 6/30/18                                    | 0%   |
| <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>2/27/18</b>                             | <b>0%</b>  |
| Action 3.5.1         | Execute at least nine (9) total educational sessions at ACE.   | 3             | Director, ACE                           | ACE Education                |               | 2/27/18                                    | %  |
| Action 3.5.2         | Research one (1) MPI Academy ½ day certificate program held in conjunction with ACE.                   | 3             | Director, ACE                           | ACE Education                |               | 2/27/18                                    | %  |
| <b>Objective 3.6</b> | <b>Plan &amp; execute four (4) community outreach activities relevant to the hospitality community</b> | <b>3</b>      | <b>Director, Leadership Development</b> | <b>Community Involvement</b> |               | <b>06/30/18</b>                            | <b>0%</b>  |
| Action 3.6.1         | Identify dates and local organizations   | 3             | Director, Leadership Development        | Community Involvement        |               | 8/15/17                                    | 0%   |
| Action 3.6.2         | Promote activity to chapter membership and the community   | 3             | Director, Leadership Development        | Community Involvement        |               | 06/30/18                                   | 0%   |
|                      |  |               |   |                              |               |  |  |
|                      |  |               |   |                              |               |  |  |

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|----------------------|--|----------|----------------------------------|-----------------------|---------|---------|------------------------------------|--|
|                      |  |          |                                  |                       | Expense | Revenue |                                    |  |
| Action 3.6.3         | Publish a minimum of one (1) recap per activity, including photos for social media & <i>Perspective</i>              | 3        | Director, Leadership Development | Community Involvement |         |         | 06/30/18                           | 0%   |
| Action 3.6.4         | Publish a minimum of one (1) photo on Facebook per activity  | 3        | Director, Leadership Development | Community Involvement |         |         | 06/30/18                           | 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>06/30/18</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               |         |         | 06/30/18                           | 0%   |
| 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               |         |         | 06/30/18                           | 0%   |
| <b>Objective 3.8</b> | <b>Deliver (3) professional designate information sessions.</b>  | <b>3</b> | <b>Director, Education</b>       | <b>CMP/CMM</b>        |         |         | <b>6/30/18</b>                     | <b>0%</b>  |
| Action 3.8.1         | Deliver (1) CMP Certification Information Session  | 3        | Director, Education              | CMP/CMM               |         |         | 06/30/18                           | 0%   |
| Action 3.8.2         | Deliver (1) CMP Recertification Information Session  | 3        | Director, Education              | CMP/CMM               |         |         | 06/30/18                           | 0%   |
| Action 3.8.3         | Deliver (1) CMM Certification Information Session.   | 3        | Director, Education              | CMP/CMM               |         |         | 06/30/18                           | 0%   |
|                      |  |          |                                  |                       |         |         |                                    |  |
|                      |  |          |                                  |                       |         |         |                                    |  |
|                      |  |          |                                  |                       |         |         |                                    |  |

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|----------------------|---|---------------|--|------------------|---------------|--|--|
| <b>Objective 3.9</b> | <b>Position MPINCC as the 1<sup>st</sup> choice for event professionals to advance their career and connect to other industry professionals</b>   | <b>3</b>      | <b>Director, Marketing</b>             | <b>Marketing</b> |               | <b>6/30/18</b>                             | <b>0%</b>  |
| Action 3.9.1         | Work with the Executive Director and office staff to edit all chapter marketing communications for content and style that contains the consistent message of MPINCC.  | 3             | Director, Marketing                    | Marketing        |               | 6/30/18                                    | 0%   |
| Action 3.9.2         | Establish a standardized method and baseline for tracking social media engagement: <ul style="list-style-type: none"> <li>➤ Twitter Retweets</li> <li>➤ Facebook Comments &amp; Shares</li> <li>➤ Instagram Likes</li> <li>➤ LinkedIn Likes</li> </ul>                        | 3             | Director, Marketing                    | Marketing        |               | 8/30/17                                    | 0%   |
| Action 3.9.3         | Increase social media activity a minimum of 5% over March 2017 figures on Twitter, Facebook, Instagram, and LinkedIn platforms.<br>Social media channels (as of 3/31/2017):<br>Twitter followers: 3,495<br>Facebook likes: 1,018<br>Instagram: 196<br>LinkedIn members: 1,669 | 3             | Director, Marketing                    | Marketing        |               | 6/30/18                                    | 0%   |
| Action 3.9.4         | Post a minimum of twenty (20) times per month on social media platforms   | 3             | Director, Marketing                    | Marketing        |               | 6/30/18                                    | 0%   |
| Action 3.9.5         | Invite a minimum of ten (10) mainstream media to attend ACE and education events that feature speakers of interest to provide coverage.   | 3             | Director, Marketing                    | Marketing        |               | 6/30/18                                    | 0%   |
| Action 3.9.6         | Oversee the PR Agency to write & distribute a press release about ACE that is picked up by a minimum of 2 industry media outlets and 1 non-industry.  | 3             | Director, Marketing                    | Marketing        |               | 2/28/18                                    | 0%   |

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





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| <b>Objective 3.10</b> | <b>Execute the Chairman's Challenge</b>  | <b>3</b> | <b>Immediate Past President</b> | <b>Foundation Liaison</b> |  | <b>6/30/18</b> | <b>0%</b> |
|-----------------------|--|----------|---------------------------------|---------------------------|--|----------------|-----------|
| Action 3.10.1         | Oversee the Chairman's Challenge Committee to execute a minimum of one Chairman's Challenge activity for funding a donation to MPI Foundation. | 3        | Immediate Past President        | Foundation Liaison        |  | 6/30/18        | 0%        |

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**METRIC 4: Volunteer Engagement**

| <b>Year-End Actual:</b><br>1. 20-25% of Members Volunteering = 1 Point<br>2. 26-30% of Members Volunteering = 2 Points<br>3. 31% or Above of Members Volunteering = 3Point |   | <b>145</b> | <b>Meets Score:</b><br><b>Calculation:</b><br>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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|  |   |            |   |                              | Expense      | Revenue               |                                    |  |
| <b>Objective 4.1</b>   | <b>Recruitment - Increase volunteer involvement in MPINCC to 165 volunteers (20% of membership)</b>                       | <b>4</b>   | <b>Director, Leadership Development</b>   | <b>Volunteer Development</b> |              |                       | <b>6/30/18</b>                     | <b>0%</b>  |
| Action 4.1.1   | Contact all interested volunteers within one week of submitting online volunteer request form                             | 4          | Director, Leadership Development  | Volunteer Development        |              |                       | 6/30/18                            | 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        |              |                       | 6/30/18                            | 0%   |
| Action 4.1.3   | Create volunteer recruitment visuals (using Chair Training, Gala, ACE, interviews, etc)                                   | 4          | Director, Leadership Development  | Volunteer Development        |              |                       | 6/30/18                            | 0%   |
| Action 4.1.4   | Provide access to the online Volunteer Interest Form at the membership table at all Professional Education Programs (PEP) | 4          | Director, Leadership Development  | Volunteer Development        |              |                       | 6/30/18                            | 0%   |
| Action 4.1.5   | Deliver one (1) Committee Trade Show to recruit volunteers  | 4          | Director, Leadership Development  | Volunteer Development        |              |                       | 6/30/18                            | 0%   |
| Action 4.1.6   | Convert 20% of Chapter Engagement attendee members to volunteers  | 4          | Director, Leadership Development  | Volunteer Development        |              |                       | 6/30/18                            | 0%   |

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|----------------------|--|---------------|---|--------------------------------|---------------|--|--|
| <b>Objective 4.2</b> | <b>Retention - Complete two (2) check-ins with Committee Chairs and Co-Chairs (mid-year and end of year)</b>               | <b>4</b>      | <b>Director, Leadership Development</b> | <b>Volunteer Development</b>   |               | <b>6/30/18</b>                             | <b>0%</b>  |
|                      | Action 4.2.1 No Actions Listed   |               |   |                                |               |  |  |
| <b>Objective 4.3</b> | <b>Retention - Execute a training for Chairs and Co-Chairs</b>   | <b>4</b>      | <b>Director, Leadership Development</b> | <b>Volunteer Development</b>   |               | <b>6/30/18</b>                             | <b>0%</b>  |
|                      | Action 4.3.1 No Actions Listed   |               |   |                                |               |  |  |
| <b>Objective 4.4</b> | <b>Recognition - Deliver one (1) Volunteer Appreciation Reception</b>  | <b>4</b>      | <b>Director, Leadership Development</b> | <b>Volunteer Development</b>   |               | <b>6/30/18</b>                             | <b>0%</b>  |
|                      | Action 4.3.1 No Actions Listed   |               |   |                                |               |  |  |
| <b>Objective 4.5</b> | <b>Succession Planning - Implement application process for Chair and Co-Chair positions</b>                                | <b>4</b>      | <b>President-Elect</b>                  | <b>OTP</b>                     |               | <b>5/31/18</b>                             | <b>0%</b>  |
|                      | Action 4.5.1 Propose application and get board approval  | 4             | President-Elect                         | OTP                            |               | 3/31/18                                    | 0%   |
|                      | Action 4.5.2 Execute application   | 4             | President-Elect                         | OTP                            |               | 5/31/18                                    | 0%   |
| <b>Objective 4.6</b> | <b>Execute a minimum of one (1) engagement opportunity for Past Presidents</b>   | <b>4</b>      | <b>Immediate Past President</b>         | <b>Past Presidents Council</b> |               | <b>06/30/18</b>                            | <b>0%</b>  |
|                      | Action 4.6.1 Host a Past Presidents dinner prior to one Education program with complimentary registration to that program. | 4             | Immediate Past President                | Past Presidents Council        |               | 06/30/18                                   | 0%   |
|                      | Action 4.6.2 Engage a minimum of three Past Presidents on Committees, either as Committee members or Committee leadership. | 4             | Immediate Past President                | Past Presidents Council        |               | 06/30/18                                   | 0%   |

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

**2017-2018 CHAPTER BUSINESS PLAN FINAL**  
**(as of 6-14-17)**

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

| Previous Year's Actuals: 0.03% as of 6/22/16 |  | 1. Year-End Gross Margin is 1-5% = 1 Point<br>2. Year-End Gross Margin is 5.1-10% = 2 Points<br>3. Year-End Gross Margin is 10.1% or above = 3 Points |                                 |   | Gross Margin % | Calculation: Total Revenue Minus Total Expenses Divided by Total Revenue = Gross Margin % |                                 |   |
|--|--|---|---------------------------------|---|----------------|---|---------------------------------|---|
| 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 a "Culinary Experience" Event (ie. Corks &amp; Forks) to achieve a profit of \$6,800</b>                                     | <b>5</b>  | <b>Director, Special Events</b> | <b>Culinary Experience</b>                |                |   | <b>3/31/18</b>                  | <b>0%</b>   |
| <b>Objective 5.2</b>                         | <b>Execute a "Holiday Event" to achieve a minimum net profit of \$925</b>  | <b>5</b>  | <b>Director, Special Events</b> | <b>Holiday Event</b>                      |                |   | <b>12/30/17</b>                 | <b>0%</b>   |
| <b>Objective 5.3</b>                         | <b>Achieve profit of \$125,000 for Annual Conference &amp; Expo (ACE)</b>  | <b>5</b>  | <b>Director, ACE</b>            | <b>Annual Conference &amp; Expo (ACE)</b> |                |   | <b>3/31/18</b>                  | <b>0%</b>   |
|  | Action 5.3.1 Secure 450 planner registrations  | 5   | Director, ACE                   | ACE                                       |                |   | 3/31/18                         | 0%  |
|  | Action 5.3.2 Collaborate with Chapter Office to design and implement a streamline process for registration and sponsorships.         | 5   | Director, ACE                   | ACE                                       |                |   | 3/31/18                         | 0%  |
| <b>Objective 5.4</b>                         | <b>Achieve \$115,000 in partnerships for 2017-2018 program year</b>  | <b>5</b>  | <b>Director, Partnerships</b>   | <b>Partnerships</b>                       |                |   | <b>6/30/18</b>                  | <b>0%</b>   |
|  | Action 5.4.1 Begin soliciting and securing 2017-2018 sponsorships in 2016-2017 calendar year   | 5   | Director, Partnerships          | Partnerships                              |                |   | 6/30/17                         | 0%  |
|  | Action 5.4.2 Revise and revamp the partnerships/sponsorships "ask" by centralizing our efforts, partnerships single point of contact | 5   | Director, Partnerships          | Partnerships                              |                |   | 6/30/18                         | 0%  |
|  | Action 5.4.3 Secure sponsorships for ACE, exceeding \$35,000   | 5   | Director, Partnerships          | Partnerships                              |                |   | 2/27/18                         | 0%  |
|  | Action 5.4.4 Secure \$63,500 in sustaining and program sponsorships.   | 5   | Director, Partnerships          | Partnerships                              |                |   | 6/30/18                         | 0%  |

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| <b>Item</b>          | <b>Description</b>   | <b>Metric</b> | <b>Owner<br/>(Who is responsible?)</b> | <b>Committee</b> | <b>Budget</b> | <b>Completion Date<br/>(No Later than)</b> | <b>Stage to Completion<br/>(e.g., 10%, 25%, 50%, etc. – For Use at Mid-Year Retreat)</b> |
|----------------------|--|---------------|--|------------------|---------------|--|--|
| Action 5.4.5         | Secure total of \$1,500 in raffle ticket sales at educational programs.  | 5             | Director, Partnerships                 | Partnerships     |               | 6/30/18                                    | 0%   |
| Action 5.4.6         | Secure \$15,000 in raffle ticket sales and auction sales at the Holiday Event Raffle and the Gala Auction              | 5             | Director, Partnership                  | Partnerships     |               | 6/30/18                                    | 0%   |
| Action 5.4.7         | Secure A/V sponsorship starting in November 2017 (in-kind sponsor / chapter covers labor)                              | 5             | Director, Partnerships                 | Partnerships     |               | 6/30/18                                    | 0%   |
| <b>Objective 5.5</b> | <b>Create a comprehensive investment strategy of chapter reserves to ensure consistent financial health of chapter</b> | <b>5</b>      | <b>VP, Finance</b>                     |                  |               | <b>6/30/18</b>                             | <b>0%</b>  |
| Action 5.5.1         | Meet with Chapter Office in Q1 2017-2018 to review current investment position   | 5             | VP, Finance                            |                  |               | 6/30/18                                    | 0%   |
| Action 5.5.2         | Provide board in Q1 2017-2018 with YOY summary of financial position as well as financial summary overall              | 5             | VP, Finance                            |                  |               | 6/30/18                                    | 0%   |