



Meeting Professionals International Orange County Chapter Strategic Plan

Date Created: June 24, 2007

Vision

MPI will be the pivotal force in positioning meetings and events as a key strategic component of an organization's success.

Mission

MPI is the leading global membership community that is committed to shaping and defining the meeting and event industry.

GOAL: "The purpose (Strategy) toward which an endeavor is directed."

Strategy 1:

Create professional development pathways and resources that enable members to evolve their careers towards positions of strategic understanding and influence

Strategy 2:

Increase awareness and influence about the value of meetings with senior decision-making executives at corporations, associations and organizations

Strategy 3:

Identify trends and deliver innovative solutions to ensure MPI is the premier market place for both suppliers and planners.



Meeting Professionals International Orange County Chapter Business Plan

Date Created: June 24, 2007

Summary

Since Meeting Professionals International Orange County Chapter is committed to shaping and defining the meeting and event industry in the Greater Orange County area, we are establishing and implementing this business plan to ensure its design and development for the continued growth of our membership.

Our chapter has many external influences including local industry trends, which will determine the success of our resources. We will work with MPI Headquarters to minimize any constraints and obstacles.

Our chapter will effectively communicate to all members ensuring proper leadership and guidance be given on a consistent basis. We will also commit our time and resources to ensure the successful accomplishment of our goals.

Operating Environment

Industry Trends

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

Social	Technology
<ul style="list-style-type: none"> • Family time (work/life balance) • Other chapters of MPI to choose from • Geographic restrictions • Other non-profit organizations taking away our volunteers time • Downsized meeting planning department leave less time for outside activities 	<ul style="list-style-type: none"> • Web-based training • Virtual meetings • Conference calls • Need for better usability of technology (websites, online registration)
Economic	Political
<ul style="list-style-type: none"> • Natural disasters • Procurement becoming more prominent in the decision process • Price conscious (dues, etc.) • Rising gas prices • Geographic restrictions (home prices increasing leaving member moving farther away) 	<ul style="list-style-type: none"> • Terrorism • War • Mid-Term Elections • Transportation/Freeways/Mass Transit • Airport (international) no direct flights to OC • Health Scares

Locally

Our chapter is particularly affected by member attrition, contract attrition, low attendance to meetings, less personal contact, social cliques and ROI value. The OC Chapter is also affected by imbalance of supplier vs. planner attendance at meetings, negative attitudes towards the chapter, no funds to attend meetings or renew membership which in turn means less attendance and fewer opportunities for networking and quality education. We are also faced with struggling students, California budget issues, layoffs, and higher interest rates, new hotels in Orange County, experience gaps, and life balance.

Competition

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

Competition	How They Compete ("X" All That Apply)							Collaboration Possible?
	Education	Membership	Volunteers	Networking	Advertising	Revenue	Branding	
Other MPI Chapters	X	X	X	X	X	X	X	Yes
ANA Chamber	X	X	X	X				Yes
Other Industry Assn's	X	X	X	X	X	X	X	Yes
CSUF	X							Yes
UCSD	X							Yes
AOCVCB	X	X	X	X				Yes
MPI Int'l.	X	X	X	X	X	X	X	Yes
Seminar Companies	X							Yes
Jobs Websites (Monster, HotJobs, Hcareers)					X	X		Yes
OCC	X		X		X	X		Yes
UCI								No
Organizational In-house Trainings	X							No

Collaboration Opportunities (if "yes" was chosen for any of the above competitors, please detail the collaboration possibilities):

Resources

Our chapter resources consist of:

Funding

Our chapter has a total of \$132,450.00 to fund programs this year (Budget is in separate attachment)

Time and Talent

Our chapter has 100 volunteers, who, in total, can devote 200 hours per week to our chapter. To utilize all the talent that is available in our chapter, we need to engage other members and efficiently use their time. To do so will involve us in motivating, coaching, mentoring and delegating.

Marketing and PR Opportunities

To maximize the value of the MPI brand, we will promote and market our chapter by using:

- **Business media:** OC Register/LA Times (OC ED)/ Tribune/ OC Business Journal, Rental Staging Magazines
- **Industry media:** M&C, Agenda, Convene, Meeting News, CMI, Meeting Professional / Community Net News, TIA.org publications,
- **Newsletter and website:** Newsletter and website—Electronic newsletter, advertising on Web site
- **Mailings:** Postcards, fliers at monthly meetings regarding future meetings
- **Word of mouth advertising:** Talk about MPI to our clients

Through membership referral programs and recognition events, we will reward and encourage members to promote our chapter and its programs.

MPI Resources

Our chapter will make full use of the tools and assistance provided by headquarters, especially: MPI manuals and toolkits, Chapter Relations Managers (CRM), Chapter Leadership Conference (CLC), WEC, PEC, Institutes, CMP Conclave, CMM Program, Multi-Cultural Initiative (Culture Active Tool) (MCI), Digital Membership Directory, key speaking points, MPI Leadership presentations and the Platinum Speaker Series.

Constraints

We are aware that the following may prove to be constraints or obstacles:

- Board visibility at meetings
- Partnering with other associations and bureaus
- Full understanding of the chapter bylaws and policies & procedures
- Distributing board meeting minutes in a timely fashion
- Board turnover
- More committee members
- Finding the funds to redesign the website
- Continuous review of strategic plan
- Recruitment & Retention of membership
- Fulfillment of member needs

Monitoring and Evaluation Tools

To ensure that we accomplish our plans and remain committed to our objectives, we will:

- Use all our Check Cards at every Board and Committee meeting.
- Follow the five key steps in any evaluation process.
- We will apply the following success criteria:
 - On a scale of 1-5, scores of 4.5 or higher, for our educational programs.
 - Monthly membership retention rates of 70%.

MPI Pathways Chapter Goals, Objectives and Results

MPI has established Strategic Goals, called *Pathways*, as part of a visionary Strategic Plan designed to elevate the role of meetings - and those who produce them - in business. Launched in 2003, Pathways to Excellence focuses on three core goals:

Pathway 1:

Create professional development pathways and resources that enable members to evolve their careers towards positions of strategic understanding and influence

Pathway 2:

Increase awareness and influence about the value of meetings with senior decision-making executives at corporations, associations and organizations

Pathway 3:

Identify trends and deliver innovative solutions to ensure MPI is the premier market place for both suppliers and planners.

MPI's Pathways are, in effect, the critical Chapter Goals. The accompanying Chapter Objectives – determined by the chapter Board of Directors at its retreat, should support and be aligned with MPI's Pathways, and each Chapter Objective must support at least two of MPI's Pathways.

Also in 2003, MPI created a Chapter Strategic Planning module designed to assist its chapters in formulating a Business Plan. This program enhances MPI's global strategy and helps the chapter to: develop an effective team, set SMART outcomes, draft a business plan and develop a means of monitoring and evaluating throughout the year.

To identify Chapter Goals, Objectives and Results, it is important to agree on a definition of each. MPI defines these as:

- Goal (Strategy) is defined as: **“The purpose toward which an endeavor is directed.”**
- Objective is defined as: **“A course of action that one intends to follow or an aim that guides action.”** (Objectives also must be **“SMART – Specific, Measurable, Attainable, Realistic, Timed**)
- Result is defined as: **“A consequence, effect, or conclusion.”**

Pathways to Excellence – Strategic Objective 1

Create professional development pathways and resources that enable members to evolve their careers towards positions of strategic understanding and influence. Business Plan Outcomes Which Support Objective 1:

Objective/Result	Lead	Budget	Revenue	Completion Date
1.1 Increase overall attendance at the educational conference to a minimum of 160	VP, Education	\$14,250	\$20,000	June 30, 2008
1.2 Survey all members who complete the CMP Study Group course and sat for the exam. Receive 3.0 or higher on evaluations	VP, Education	\$0	\$900	June 30, 2008
1.3 Increase planner attendance at monthly meetings at a minimum of 27 per month and/or 50 planner members attend at least one meeting	VP, Education	\$0	\$15,000	June 30, 2008
1.4 Communicate to members monthly the chapter finances	VP, Finance	\$0	\$0	June 30, 2008
1.5 Create and implement a leadership development program	President Elect	\$0	\$0	June 30, 2008
1.6 Recruit 115 new members	VP Membership	\$250	\$0	June 30, 2008
1.7 Maintain a minimum of 72% retention rate	Director, Member Care	\$250	\$0	June 30, 2008
1.8 Revamp and relaunch MPIOC website*	VP Communications	\$10,000	\$0	June 30, 2008
1.9 Develop and distribute 12 monthly newsletters	Director, Publications	\$250	\$0	June 30, 2008

*Also supports Strategic Objectives 2 & 3

Pathways to Excellence – Strategic Objective 2

Increase awareness and influence about the value of meetings with senior decision-making executives at corporations, associations and organizations. Business Plan Outcomes Which Support Objective 2:

Outcome	Lead	Budget	Revenue	Completion Date
2.1 Develop and execute a minimum of three community outreach projects	Director, Community Outreach	\$250	\$0	June 30, 2008
2.2 Develop and implement a chapter Advocacy plan	Director, Advocacy	\$250	\$0	June 30, 2008
2.3 Create and distribute marketing and correspondence materials	VP Communications	\$6,000	\$0	August 22, 2007
2.4 Generate \$11,000 in advertising revenue* No increase because of great Strategic Program	Director, Advertising	\$2,800	\$13,000	June 30, 2008

Pathways to Excellence – Strategic Objective 3

Identify trends and deliver innovative solutions to ensure MPI is the premier market place for both suppliers and planners. Business Plan Outcomes Which Support Objective 3:

Outcome	Lead	Budget	Revenue	Completion Date
3.1 Research and report on future investment opportunities and other revenue streams by November Board meeting	VP, Finance	\$0	\$0	November 1, 2007
3.2 Develop and execute 3 special events	Director, Special Events	\$13,700	\$24,000	June 30, 2008
3.3 Generate \$16,000 in fundraising revenue	Director, Fundraising	\$200	\$16,000	December 15, 2007
3.4 Create chapter awards and recognition plan	Director, Awards/Recognition	\$1,100	\$1,100	June 30, 2008
3.5 Generate \$2000,000 in-kind sponsorships	Director, Strategic Alliances	\$50	\$0	June 30, 2008
3.6 Generate \$5,000.00 in cash sponsorships	Director, Strategic Alliances	\$50	\$0	June 30, 2008
3.7 Create and implement tracking of benefits process to Board	Director, Strategic Alliances	\$50	\$0	August 22, 2007