

2010-2011 Business Plan Objectives & Actions v3

In this area, all Board members worked to develop measurable (S.M.A.R.T.) objective/action to ensure that they would meet and/or exceed the chapter business metrics. They decided when the deadline is, if they needed any money to accomplish the objective/action (or revenue generated) and who the owner is for each objective/action (who will drive this and make sure that it gets completed). Additionally, each objective/action below is listed in one of four categories based upon which metric item that objective/action primarily supports. It may support additional metrics and those are listed in the "Metric" column (if applicable).

Numbering Legend: Example: "1.2.1" = Metric #1, Objective #2, Action #1

| Metric #1: Net Member Growth | | | | | | |
|-------------------------------------|---|--------------|--|--|---------------------|-----------------|
| Item | Description | Metric | Owner | Committee | Expense/Revenue | Completion |
| Objective 1.1 | Attract 250 new members | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 06/30/11 |
| Action 1.1.1 | Host membership table five (5) meetings | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 06/30/11 |
| Action 1.1.2 | Launch a nonmember recruitment program | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 08/01/10 |
| Action 1.1.3 | Execute quarterly research on new membership recruitment promotions and distribute to leadership & membership | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 06/30/11 |
| Objective 1.2 | Achieve a net member growth of 2% based upon 2009-2010 year end | 1 | Director, Member Administration | Recruitment & Retention | \$3,725/\$0 | 06/30/11 |
| Action 1.2.1 | Committee members will execute ROI (renewal) calls a minimum of 6 months prior to renewal date | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 06/30/11 |
| Action 1.2.2 | Review & update all telephone and email scripts | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 08/01/10 |
| Action 1.2.3 | Plan a minimum of one (1) Nothing But Networking Event | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 06/30/11 |
| Action 1.2.4 | Develop a reporting system to quantify & compile results from ROI calls | 1 | Director, Member Administration | Recruitment & Retention | \$0/\$0 | 08/31/10 |
| Objective 1.3 | Maintain 50 student members | 1,2,3 | Director of Membership Administration | Student Affairs Committee | \$2000 / \$0 | 06/30/11 |
| Action 1.3.1 | Provide Student Scholarships which utilizes at least 40% of the budget | 1,2,3 | Director of Membership Administration | Student Affairs Committee | \$2000 / \$0 | 06/30/11 |
| Action 1.3.2 | Implement a process for providing a strong presence at a minimum of 2 local universities | 1,2,3 | Director of Membership Administration | Student Affairs Committee | \$0 / \$0 | 09/01/10 |

| Metric #2: Member Satisfaction | | | | | | |
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| Item | Description | Metric | Owner | Committee | Expense/Revenue | Completion |
| Objective 2.1 | Maintain 25 new CMP certifications for the chapter | 2 | Director, Education | CMP | \$2805 / \$5100 | 06/30/11 |
| Action 2.1.1 | Deliver 1 CMP Informational Session | 2 | Director, Education | CMP | \$0 / \$0 | 11/01/10 |
| Action 2.1.2 | Conduct Winter CMPU | 2 | Director, Education | CMP | \$1801 / \$3000 | 06/30/11 |

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| Action 2.1.3 | Conduct CMP Winter Refresher | 2 | Director, Education | CMP | \$1004 / \$2100 | 12/31/10 |
| Objective 2.2 | Execute the CMP Recertification Process | 2 | Director, Education | CMP | \$0 / \$0 | 09/01/10 |
| Action 2.2.1 | Obtain list of current Chapter CMP's for recertification from CIC | 2 | Director, Education | CMP | TBD / TBD | 10/01/10 |
| Action 2.2.2 | Deliver 1 CMP recertification session | 2 | Director, Education | CMP | \$0 / \$0 | 11/01/10 |
| Objective 2.3 | Execute 4 Professional Breakfast Programs | 2, 3 | Director, Education | PBP | \$17540 / \$16400 | 05/01/11 |
| Action 2.3.1 | Ensure at least one hybrid formatted event | 2, 3 | Director, Education | PBP | \$0 / \$0 | 05/01/11 |
| Action 2.3.2 | Hold a minimum of 2 PBP's outside San Francisco | 2, 3 | Director, Education | PBP | \$0 / \$0 | 05/01/11 |
| Objective 2.4 | Execute 5 Professional Education Programs | 2, 3 | Director, Education | PEP | \$50,000 / \$39,625 | 06/01/11 |
| Action 2.4.1 | Execute a minimum of 1 senior level topic at all PEP's | 2, 3 | Director, Education | PEP | \$0 / \$0 | 06/01/11 |
| Action 2.4.2 | Hold a minimum of 1 PEP outside San Francisco | | Director, Education | PEP | \$0 / \$0 | 06/01/11 |
| Objective 2.5 | Deliver 2 webinars programs | 2,3, | Director, Education | Special Projects | \$1160 / \$800 | 03/01/11 |
| Action 2.5.1 | Execute 1 webinar hybrid event w/PBP | 2,3 | Director, Education | Special Projects | \$0 / \$0 | 03/01/11 |
| Action 2.5.2 | Execute a minimum of 1 senior level topic at all webinars | 2,3 | Director, Education | Special Projects | \$0 / \$0 | 03/01/11 |
| Objective 2.6 | Produce & execute Annual Conference & Expo Education | 2,3,4 | Director, Special Events | Special Projects | \$0 / \$0 | 03/01/11 |
| Action 2.6.1 | Design & deliver a technology track at Annual Conference & Expo | 2,3,4 | Director, Special Events | Special Projects, Annual Conf/Expo | \$0 / \$0 | 03/01/11 |
| Action 2.6.2 | Design & deliver non-technology tracks at Annual Conference & Expo | 2,3,4 | Director, Special Events | Special Projects, Annual Conf/Expo | \$0 / \$0 | 03/01/11 |
| Action 2.6.3 | Execute a minimum of 1 senior level track at Annual Conference & Expo | 2,3 | Director, Education | Special Projects | \$0 / \$0 | 03/01/11 |
| Objective 2.7 | Distribute new member ROI information minimum of 4 times per year | 2,3 | Director, Member Care | New Member Care | \$300 / \$0 | 06/30/11 |
| Action 2.7.1 | Provide chapter orientation at a minimum of 4 PEP events | 2,3 | Director, Member Care | New Member Care | \$0 / \$0 | 06/30/11 |
| Objective 2.8 | Design & implement an Ambassador Program | 2,3 | Director, Member Care | New Member Care | \$0 / \$0 | 08/15/10 |
| Action 2.8.1 | <i>No Action Items Identified</i> | | | | | |
| Objective 2.9 | Create an engaging environment for the student members maintaining a student member participation rate of 40% | 2,3 | Director of Membership Administration | Student Affairs Committee | \$5000 / \$5000 | 06/30/11 |
| Action 2.9.1 | Host a minimum of 2 student focused events with a minimum attendance of 25 students at each event | 2,3 | Director of Membership Administration | Student Affairs Committee | \$3,000 / \$0 | 06/30/11 |
| Action 2.9.2 | Ensure all student members are assigned a committee ambassador. | 2,3 | Director of Membership Administration | Student Affairs Committee | \$0 / \$0 | 09/01/10 |
| Action 2.9.3 | Identify a minimum of 2 local universities that will implement intern programs for student members | 2,3 | Director of Membership Administration | Student Affairs Committee | \$0 / \$0 | 09/01/10 |

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| Objective 2.10 | Plan and execute two holiday receptions, one in San Francisco and one in the South Bay, to make a combined net profit of \$2,150 | 2 | Director, Special Events | Holiday Committee | SF:\$9700/\$11,600 SB:\$4,250/\$4,500 | 12/10/10 |
| Action 2.10.1 | Select unique and attractive venue | 2 | Director, Special Events | Holiday Committee | \$0 / \$0 | 08/10/10 |
| Action 2.10.2 | Secure venue and dates | 2 | Director, Special Events | Holiday Committee | \$0 / \$0 | 08/10/10 |
| Action 2.10.3 | Obtain in-kind donations from preferred MPI members allowing us to raise \$3000 in net profit | 2 | Director, Special Events | Holiday Committee | \$0 / \$3000 \$0 / \$2150 | 12/10/10 |
| Action 2.10.4 | Develop two (2) brief educational components (one for each reception) | 2 | Director, Special Events | Holiday Committee | \$5000 / \$0 | 12/10/10 |
| Action 2.10.5 | Apply for MPI Foundation Grant to cover expenses for educational components | 2 | Director, Special Events | Holiday Committee | \$0 / \$5000 | 08/10/10 |
| Action 2.10.6 | Plan and execute toy drive (or other charitable donation table) onsite at both holiday receptions | 2 | Director, Special Events | Holiday Committee | \$0 / \$0 | 12/10/10 |
| Action 2.10.7 | Send email blasts/highlights in newsletter to membership regarding toys drives (or other charitable donation table) | 2 | Director, Special Events | Holiday Committee | \$0 / \$0 | 11/11/10 |
| Objective 2.11 | Increase overall planner attendance at holiday receptions by 3% over previous years attendance | 2,3 | Director, Special Events | Holiday Committee | \$0 / \$0 | 12/10/10 |
| Action 2.11.1 | Develop a tracking mechanism or tool to gauge effectiveness & completion of this objective | 2 | Director, Special Events | Holiday Committee | \$0 / \$0 | 10/1/10 |
| Objective 2.12 | Increase non-member attendance at Gala over previous year by 10% | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.12.1 | Market to ISES, NACE, PCMA, BTA's, etc | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.12.2 | Trade articles/ads with other industry publications (media partners) | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Objective 2.13 | Excel previous year's Gala evaluation results by 2% | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.13.1 | Secure unique appropriate venue to attract planner audience | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.13.2 | Plan event format as requested by previous years' evaluation results | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Objective 2.14 | Increase attendance at Gala over previous year by 5% | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.14.1 | Secure unique appropriate venue to attract target audience | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Action 2.14.2 | Develop hosted planner program, early registration incentives, and social networking | 2,3 | Director, Special Events | Gala | \$0 / \$0 | 06/30/11 |
| Objective 2.15 | Meet Gala budgeted revenue and profit numbers | 4 | Director, Special Events | Gala | \$24,050 / \$24,550 | 06/30/11 |

Metric #3: Engagement & Participation

| Item | Description | Metric | Owner | Committee | Expense/Revenue | Completion |
|-----------------------|---|----------------|--------------------------------|---------------------------------|--------------------------|-----------------|
| Objective 3.1 | Increase social community by 10% over previous year numbers | 3,1,2 | Director, Marketing | Marketing | \$0 / \$0 | 06/30/11 |
| Action 3.1.1 | Maintain a minimum of 3 social media networks | 3,1,2 | Director, Marketing | Marketing | \$0 / \$0 | 06/30/11 |
| Action 3.1.2 | Develop a strategic social networking plan | 3,1,2 | Director, Marketing | Marketing | \$0 / \$0 | 09/01/10 |
| Objective 3.2 | Update global industry calendar monthly | 3,1 | Director, Marketing | Marketing | \$0 / \$0 | 06/30/11 |
| Action 3.2.1 | <i>No Action Items Identified</i> | | | | | |
| Objective 3.3 | Develop a minimum of 2 key external marketing relationships | 3,1 | Director, Marketing | Marketing | \$400 / \$0 | 06/30/11 |
| Action 3.3.1 | <i>No Action Items Identified</i> | | | | | |
| Objective 3.4 | Publish & distribute 6 issues of Perspective | 3,1,2,4 | VP, Communications | Perspective | \$5790 / \$6000 | 06/30/11 |
| Action 3.4.1 | Complete an evaluation of Perspective future needs | | VP, Communications | Perspective | \$0 / \$0 | 06/30/11 |
| Objective 3.5 | Increase new member attendance at events by 3.5% over previous year | 3,2 | Director, Member Care | New Member Care | \$0 / \$0 | 06/30/11 |
| Action 3.5.1 | Develop a tracking tool, FAQ's and instructions for new member calls. | 3,2 | Director, Member Care | New Member Care | \$0 / \$0 | 08/01/10 |
| Action 3.5.2 | Report monthly the number of new member calls made. | 3,2 | Director, Member Care | New Member Care | \$0 / \$0 | 06/30/11 |
| Objective 3.6 | Create a minimum of 5 networking opportunities for new members to engage | 3 | Director, Member Care | New Member Care | \$0 / \$0 | 06/30/11 |
| Action 3.6.1 | Implement a minimum of 4 networking icebreakers at PEP's | 3 | Director, Member Care | New Member Care | \$100 / \$0 \$0 / \$0 | 06/30/11 |
| Action 3.6.2 | Plan 1 Nothing But Networking event | 3 | Director, Member Care | New Member Care | \$0 / \$0 | 06/30/11 |
| Objective 3.7 | Recognize MPINCC volunteers through 3 key activities | 3,2 | Director of Member Care | Awards & Recognition | \$2500 / \$0 | 06/30/11 |
| Action 3.7.1 | Continue committee spotlight recognition at a minimum of 5 programs | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 06/30/11 |
| Action 3.7.2 | Execute volunteer recognition reception | 3,2 | Director of Member Care | Awards & Recognition | \$2500 / \$0 | 06/30/11 |
| Action 3.7.3 | Announce 5 Power Players annually | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 06/30/11 |
| Objective 3.8 | Award a minimum of 1 WEC and 1 CMPU scholarship | 3,2 | Director of Member Care | Awards & Recognition | \$4,450 / \$0 | 04/01/11 |
| Action 3.8.1 | Distribute a minimum of 2 marketing emails blast for each (WEC/CMPU) | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 03/15/11 |
| Action 3.8.2 | Ensure up to date scholarship info is on website prior to first email marketing blast | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 09/30/10 |
| Objective 3.9 | Present a minimum of 4 MPQ awards, the MPY award, the Tomorrows Leader award and a Hall of Fame award. | 3,2 | Director of Member Care | Awards & Recognition | \$3975 / \$0 | 06/30/11 |
| Action 3.9.1 | Distribute a call for nominations email for MPIQ 4 times annually | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 04/30/11 |
| Action 3.9.2 | Distribute a call for nominations email for MPY award, the Tomorrows Leader award and a Hall of Fame award. | 3,2 | Director of Member Care | Awards & Recognition | \$0 / \$0 | 04/30/11 |
| Objective 3.10 | Develop 1-3 community outreach activities working | 3,1,2 | Director Marketing | Community Outreach | \$0 / \$0 | 04/11/11 |

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| | with local organizations | | | | | |
| Action 3.10.1 | Select existing events MPI can participate in (not create proprietary events) | 3,1,2 | Director Marketing | Community Outreach | \$0 / \$0 | 09/10/10 |
| Action 3.10.2 | Market each activity a minimum of one time (1 time per each per activity) to MPI members as well as other local industry organization chapters | 3,1,2 | Director Marketing | Community Outreach | \$0 / \$0 | 04/11/11 |
| Action 3.10.3 | Create press releases per event (1-3 releases to support objective) | 3,1,2 | Director Marketing | Community Outreach | \$0 / \$0 | 04/11/11 |
| Action 3.10.4 | Create and deploy post event surveys per event (1-3 surveys to support objective) | 3,1,2 | Director Marketing | Community Outreach | \$0 / \$0 | 04/11/11 |
| Objective 3.11 | Develop & implement new MPINCC volunteer development program | 3 | President-Elect | Volunteer Development | \$2500 / \$0 | 06/30/11 |
| Action 3.11.1 | Rollout VD program at August PEP to membership | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 08/30/10 |
| Action 3.11.2 | Complete refining and testing of process of VD program | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 08/30/10 |
| Action 3.11.3 | Create new online Volunteer Interest Form (VIF) | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 07/31/10 |
| Action 3.11.4 | Create database for VD | 3 | President-Elect | Volunteer Development | \$1000 / \$0 | 07/31/10 |
| Action 3.11.5 | Execute a monthly review & evaluation of volunteer database to ensure it remains a useful tool to track volunteers and develop succession plan | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 06/30/11 |
| Action 3.11.6 | Begin intake of new VIF's and process per VD flowchart | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 08/30/10 |
| Action 3.11.7 | Complete mid-year interviews with all Chapter volunteers and discuss their potential leadership path | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 12/31/10 |
| Action 3.11.8 | Develop a comprehensive Chapter succession plan for next 2 to 3 years | 3 | President-Elect | Volunteer Development | \$0 / \$0 | 01/15/11 |
| Action 3.11.9 | Facilitate a minimum of 2 chair/co-chair peer-to-peer sessions to assist leaders in both volunteer positions as well as in their full time careers (i.e., PowerPoint training, Presentation Skills, Budgeting, Managing People, etc.) | 3 | President-Elect | Volunteer Development | \$1500 / \$0 | 06/30/11 |
| Objective 3.12 | Increase volunteer involvement in MPINCC by 13% over previous year-end totals by recruiting & identifying members interested in ad-hoc volunteer opportunities | 3 | President-Elect | Volunteer Bank | \$650 / \$0 | 06/30/11 |
| Action 3.12.1 | Distribute Volunteer Bank lists of volunteer skills and interests to Committee Chairs every other month (9/30/10, 11/30/10, 1/31/11, 3/31/11) | 3 | President-Elect | Volunteer Bank | \$0 / \$0 | 03/31/11 |
| Action 3.12.2 | Communicate 12 times annually (once a month) to Committee Chairs to ensure new volunteer placements are participating | 3 | President-Elect | Volunteer Bank | \$0 / \$0 | 06/30/11 |
| Action 3.12.3 | Ensure a minimum of 65% of active volunteer bank members volunteer at least 1 time per year. | 3 | President-Elect | Volunteer Bank | \$0 / \$0 | 06/30/11 |
| Action 3.12.4 | Distribute a minimum of 1 e- | 3 | President-Elect | Volunteer | \$0 / \$0 | 06/30/11 |

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| | mail survey annually to evaluate success of ad-hoc volunteering and access future volunteer roles | | | Bank | | |
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| Metric #4: Financial Management | | | | | | |
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| Item | Description | Metric | Owner | Committee | Expense/Revenue | Completion |
| Objective 4.1 | Raise a total of \$18,000 at Holiday & Gala Auctions | 4 | Director, Fundraising/ Sponsorship | Auction | \$450 / \$18000 | 06/30/11 |
| Action 4.1.1 | <i>No Action Items Identified</i> | | | | | |
| Objective 4.2 | Achieve \$34,000 in cash sponsorships for 2010-2011 program year | 4 | Director, Fundraising/ Sponsorship | Sponsorships | \$125 / \$34,000 | 06/30/11 |
| Action 4.2.1 | Develop new sponsorship collateral | 4 | Director, Fund/Spons | Sponsorships | \$0/\$0 | 09/30/10 |
| Action 4.2.2 | Develop sponsorship communication process | 4 | Director, Fund/Spons | Sponsorships | \$0/\$0 | 08/01/10 |
| Action 4.2.3 | Manage a minimum of 5 raffles at PEP events | 4 | Director, Fund/Spons | Sponsorships | \$0/\$500 | 06/30/11 |
| Objective 4.3 | Plan & execute First Annual Poker Tournament | 4,2,3 | Director, Special Events | Tournament | \$5,060 / \$12,875 | 12/01/10 |
| Action 4.3.1 | Secure a minimum of \$5K in cash sponsorships | 4,2,3 | Director, Spec Events | Tournament | \$5000 / \$12000 \$0 / \$5000 | 12/01/10 |
| Action 4.3.2 | Create and develop event mktg. plan | 4,2,3 | Director, Spec Events | Tournament | \$0 / \$0 | 07/31/10 |
| Objective 4.4 | Achieve a minimum of \$177,931 profit | 4,2,3 | Director, Special Events | Annual Conf/Expo | \$164,519 / \$342,450 | 06/30/11 |
| Action 4.4.1 | Finalize registration pricing | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 07/15/10 |
| Action 4.4.2 | Secure 427 Planner & 611 Exhibitor paid registrations | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 03/1/11 |
| Action 4.4.3 | Finalize Annual Conference & Expo venue and dates | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 08/31/10 |
| Action 4.4.4 | Visit venues and secure RFPs | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 08/01/10 |
| Action 4.4.5 | Raise \$15K in cash sponsorships for Conf/Expo | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 03/01/11 |
| Objective 4.5 | Create and launch Conf/Expo survey | 4,2,3 | Director, Special Events | Annual Conf/Expo | \$0 / \$0 | 03/1/11 |
| Action 4.5.1 | Achieve a 4.0 out of 6.0 on survey | 4,2,3 | Director, Spec Events | Annual Conf/Expo | \$0 / \$0 | 04/01/11 |