

2026 ANNUAL RETREAT MPI UPDATE



CHAPTER OPERATIONS TEAM



Timothy Gunn

**Vice President of
Community**



Federico Toja

**Director of Chapter
Operations**

***EMEA, APAC,
& LATAM***



Leslie Scantlebury

**Regional
Operations
Manager**

***Pacific
& Southwest US***



Marcelo DeOliveira

**Regional
Operations
Manager**

***Canada
& Northeast US***



**Angela Layton,
CMP Fellow, CMM**

**Regional
Operations
Manager**

Southeast & Midwest US

MEMBER ENGAGEMENT TEAM



Christine Richards
Manager, Membership
Development



Teresa Saucedo
Member
Engagement Rep



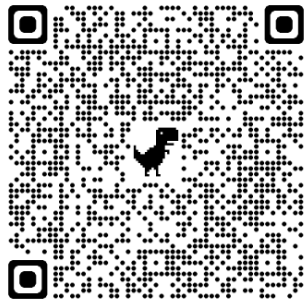
Marlene Jackson
Member
Engagement Rep



Mark Killgore
Member
Engagement Rep



Jazzlynn Garrett
Member
Engagement Rep



Contact Info by Chapter for
Chapter Ops & Membership Teams

***Canada, EMEA &
APAC***

***Northeast US &
LATAM***

***Southwest &
Southeast US***

Pacific & Midwest US

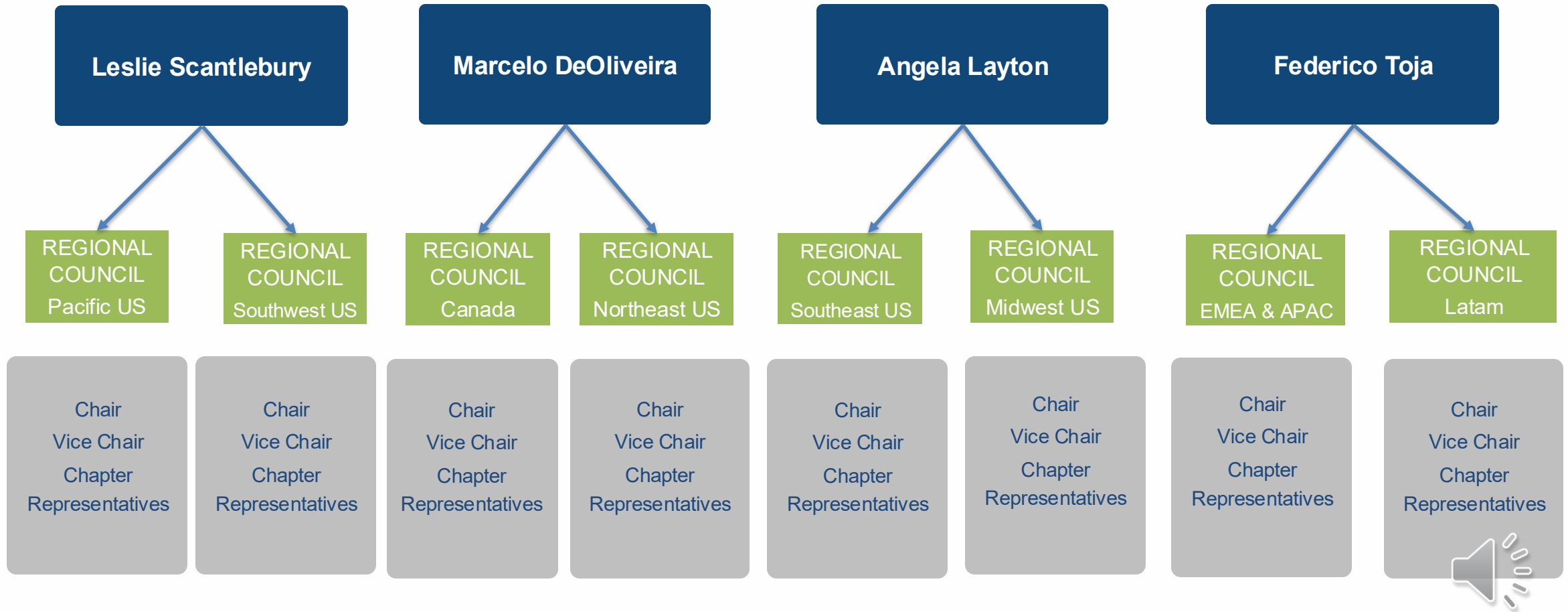


PARTNER WITH YOUR MEMBER ENGAGEMENT REPRESENTATIVE

- **New Membership:** Encourage members to attend a monthly New Member Orientation.
- **Membership Upgrades:** Follow-up with Essential members that are within your chapter area to upgrade to the Preferred member tier.
- **Profile Update:** If members provide you with new contact information, forward it to your Member Engagement Representative.
- **Membership Renewals:** This includes all members who are currently due to renew.
- **Login Issues:** Access or creating an account on mpi.org.
- **Other:** Installment plans, membership transfers, unemployed members, student in transition, retired and Lifetime memberships.



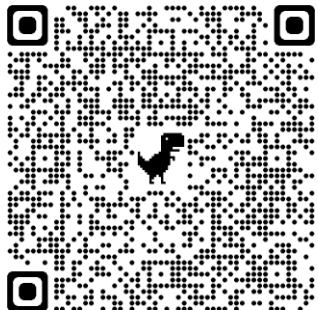
REGIONAL MANAGEMENT



REGIONAL ALIGNMENT



Region	Pacific US	Southwest US	Midwest US	Southeast US	Northeast US	Canada	LATAM	EMEA & APAC
Chapter Operations	Leslie Scantlebury	Leslie Scantlebury	Angela Layton	Angela Layton	Marcelo DeOliveira	Marcelo DeOliveira	Federico Toja	Federico Toja
Membership	Jazzlynn Garrett	Mark Killgore	Jazzlynn Garrett	Mark Killgore	Marlene Jackson	Teresa Saucedo	Marlene Jackson	Teresa Saucedo
Regional Council Chair/Vice Chair	MaryAnne Bobrow & Dana Marshall	Steven Foster & Paige Mejia	Bill Kubiack & Anthony Molino	Shannon Jones & Liz Hogan	Pam Kammerer & Wendy O'Duffy	Helene Moberg & Wentworth Willock	Rick Magana & Felipe Henao	Suzanne Mulligan & Marjolein Blok-Dignum
	Aloha Northern California Oregon Sacramento/Sierra Nevada San Diego Southern California Washington State	Arizona Sunbelt Dallas/Fort Worth Houston Area New Mexico Oklahoma Rocky Mountain Texas Hill Country	Chicago Area Heartland Indiana Kansas City Michigan Minnesota Ohio Valley St. Louis Area Wisconsin	Carolinas Georgia Greater Orlando Gulf States Kentucky Bluegrass North Florida Tampa Bay Area Tennessee South Florida Virginia	Connecticut River Valley Greater New York Middle Pennsylvania New England New Jersey Philadelphia Area Pittsburgh Potomac Upstate New York	Atlantic Canada British Columbia Greater Calgary (Club) Greater Edmonton Montreal & Quebec Ottawa Toronto	Argentina (Club) Brazil (Club) Bajio Mexicano (Club) Caribe Mexicano Central America (Club) Colombia Ecuador (Club) Mexico Peru	Belgium Luxembourg France-Switzerland Germany (Club) Iberian Italia Japan The Netherlands Poland Scandinavia Turkey (Club) United Kingdom & Ireland



CLRP → Chapter Leader Training → Board Orientation → MPI Team Contacts



Training



- **Chapter Leader All Hands Calls**
 - inform Volunteer Chapter Leaders with crucial information and updates about our organization.
- **Equity, Diversity & Inclusion (EDI)**
 - 2025 volunteers who already took the training do not need to repeat.
- **Volunteer Chapter Leader Training**
 - Sitefinity (website management)
 - QuickBooks Online
- **MPI Communities for Each Department**
 - Presidents, Membership, Marketing, Finance, Education and Chapter Administrators



CHAPTER LEADER NEWSLETTER



- Email sent to all Volunteer Chapter Leaders
- Second Thursday of each month
- Simplified & copy/paste content
- Easy access to archived past newsletters





2026 Compliance & Performance Metric Goals



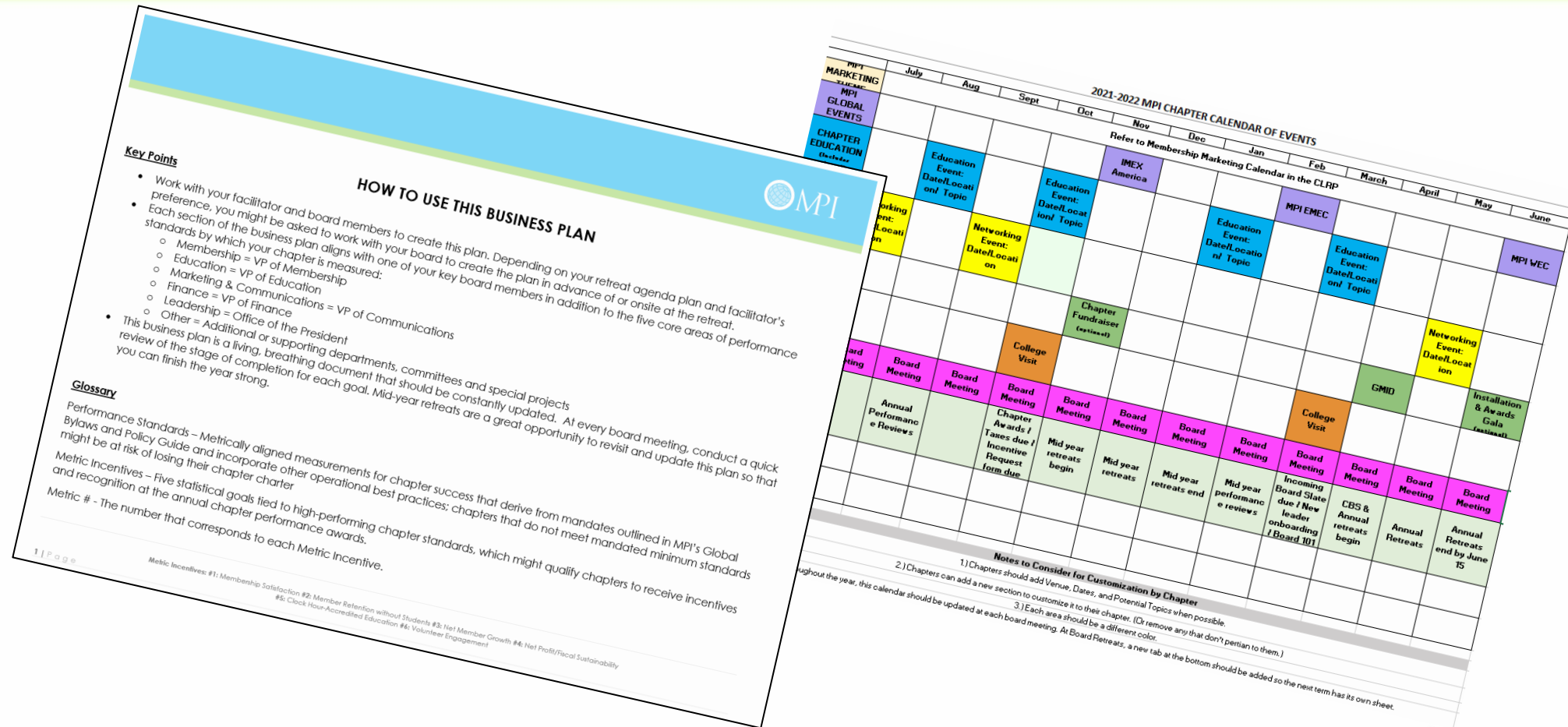
December 1

- MPI Volunteer Leader Agreement: Electronic signature via Adobe Sign. This will be emailed by your Chapter Operations Team member.
- Strategic Business Plan (MSExcels version), Budget, 18–24-month MPI Chapter Calendar of Events, MPI Chapter Policy Manual (if there are changes to the Chapter-specific policies)
- Submission of Regional Council Chapter Representative

The Compliance Checklist can be found here: [CLRP > Compliance > December 1](#)



BUSINESS PLAN & CALENDAR TEMPLATES



Chapters **MUST** use these templates found in the CLRP

CLRP > Compliance > December 1 Compliance

There is no required Budget template



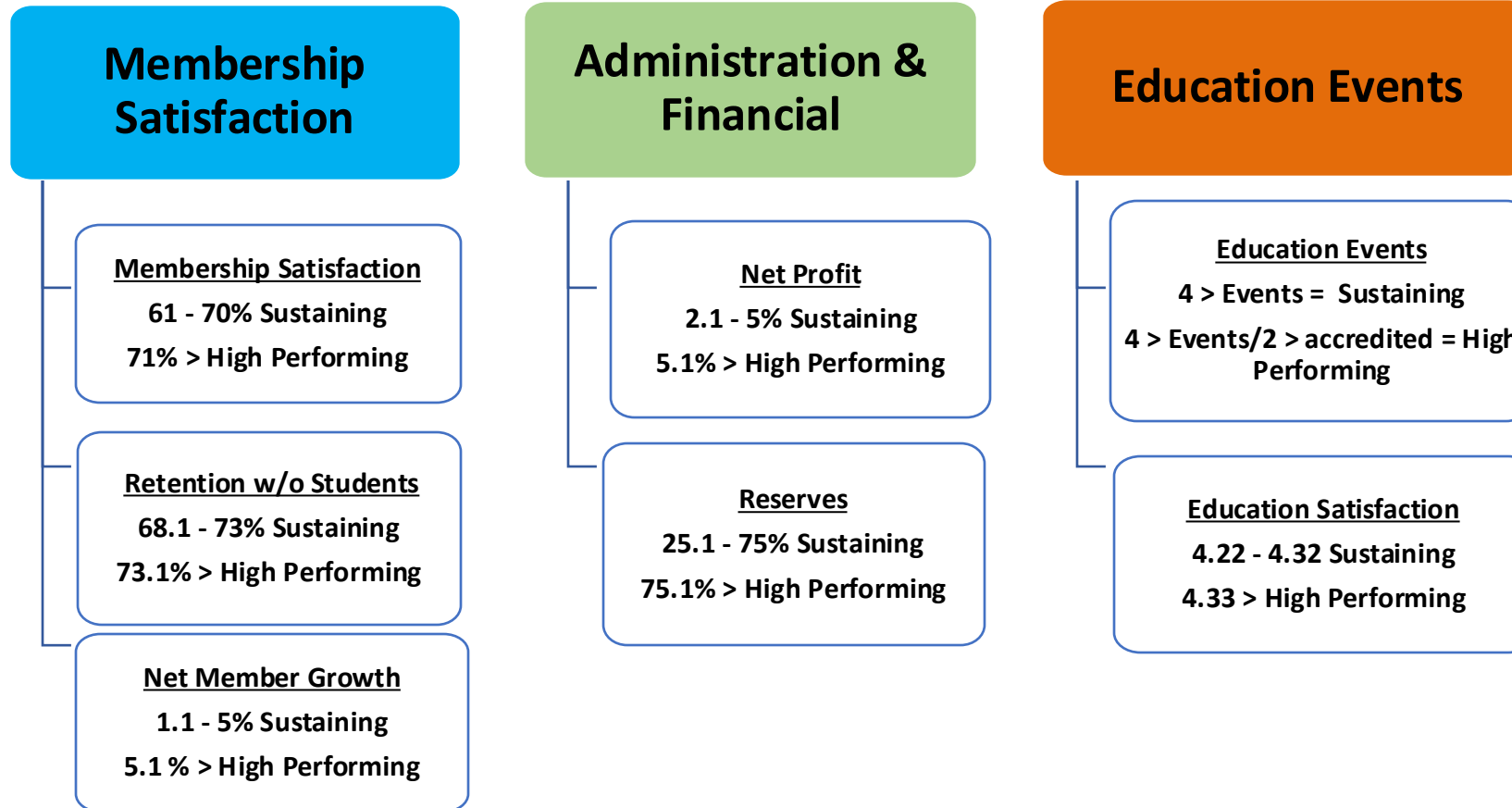
FY2026 IMPORTANT MPI EVENTS/DATES



Date	Event
January 1	Fiscal Year 2026 Begins
February 22-24	European Meetings & Events Conference (EMEC) - Barcelona
May 5	Global Meetings Industry Day (GMID)
April – June	Chapter Mid-Year Retreats (optional but recommended)
June 2-4	World Education Congress (WEC) - St. Antonio
July 1	FY2027 Chapter Board Slates Sent to Membership for Approval
August 1	FY2027 Chapter Board Slates Submitted to Global
September TBA	Chapter Leadership Summit (CLS)
September TBA	theEVENT (Canada)
September – November	Chapter Annual Retreats



FY2026 PERFORMANCE METRIC GOALS



- Annual requirement
- Any initiative that supports Anti-Human Trafficking awareness
- Visit <https://www.mpi.org/tools/anti-human-trafficking> for ideas under the Chapter Education Toolkit section of this page
 - Chapters are not restricted to the initiatives that appear on the website – creativity is encouraged
 - Chapters may not repeat an initiative that has been used in the past two years to fulfill the annual requirement
- Chapters will report the fulfillment of the AHT Requirement on the Chapter Metric Dashboard.





NEW BOARD MEMBERS




CHAPTER LEADER RESOURCE PAGE (CLRP)



- Log in to mpi.org
- Click on the drop-down menu by your name and select “Chapter Leader Resources”
- Buttons to run Membership and Chapter Metrics (Dashboard) Reports are at the top *(only let your Administrator or one designated leader enter dashboard data)*
- Role-Specific content areas are below so you can select the library and download what you need

Hi, Timothy ▾ Your Chapter: Dallas/Fort Worth Chapter



Timothy Gunn,
Vice President of Community
Meeting Professionals International

Dallas, TX
Association/Not For Profit Meeting
Professional
Dallas/Fort Worth Chapter

Preferred Membership
Member ID: 1241237
Expires on: 7/31/2026

[Update My Account Settings](#)
[Chapter Leader Resources](#)

[Sign Out](#)



Chapter Metrics



Membership Reports



Newsletter

CHAPTER LEADER RESOURCE PAGE



Resources Available:

- Chapter Administrators
- Chapter Leader Training
- Chapter Toolkits
- Compliance
- Education
- Facilitator Program
- Finance
- Marketing & Communications
- Membership
- Office of the President
- RISE Up



ADMINISTRATION
Chapter Administrators
Partners of MPI Global and our chapters.



ADMINISTRATION
Chapter Leader Training
Resources to help you be successful.



ADMINISTRATION
Chapter Toolkits
Resources to help you stay in sync.



ADMINISTRATION
Compliance



ADMINISTRATION
Education
MPI education and best practices.



ADMINISTRATION
European Chapters
European business plans & metrics.



CHAPTER DASHBOARD REPORT



Log into mpi.org -> “Chapter Leader Resources”



Clock Hours



My Academy



Member Directory



Community



Jobs



Data is updated once every 24 hours



Chapter Metrics



Membership Reports



Newsletter



Monthly Statistics - FY 2022 - 2023														
	June Y/E	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
Total	448	439	447	445	446	457	473	464	469	475				460
New	141	7	23	7	7	13	28	6	8	17				116
Renew	266	22	15	19	24	25	36	25	29	36				231
Reinstate	6						1	2	1	1				5
Cancel	177	14	14	8	7	4	14	15	6	13				95
Chapter Transfer Out	22	4	3	2	1	1	3	1		2				17
Chapter Transfer In	14	2	1	1		3	1		3	2				13
Retention	64.92%	66.53%	67.51%	67.32%	69.54%	71.43%	74.06%	73.13%	73.86%	74.61%				74.61%
Retention_NonStudent	65.70%	67.52%	68.33%	68.16%	70.68%	72.23%	74.77%	73.76%	74.71%	75.45%				75.45%
Volunteer Engagement	101	94	105	101	102	101	104	114	10	0	0	0	0	91
Education Satisfaction			4.74			4.53			3.75					4.45
Education Survey Responses			19			38			12					69

Net Non-Student / Non-Trial Member Growth			
	FY 21 - 22	FY 22 - 23	
July	461	428	-2.28%
Aug	447	435	-0.68%
Sept	439	434	-0.91%
Oct	436	435	-0.68%
Nov	433	445	1.60%
Dec	435	460	5.02%
Jan	422	453	3.42%
Feb	433	458	4.57%
Mar	431	465	6.16%
Apr	436	0	-100.00%
May	439	0	-100.00%
June	438	0	-100.00%

Education / Accredited Education Offerings Incentive Key:		Education / Accredited Education Offerings Incentive Key:		Member Retention (Non-Student) Incentive Key:	
YTD Actual	4	1 Point = 4.22 - 4.32	1 Point = 65.1% - 71.1%	YTD Actual	0
Accredited Events 4 / Cumulative Events 4		2 Points = 4.33 or Higher	2 Points = 71.1% or Higher		
1 Point = 4 or more with 0 accredited					
2 Points = 4 or more with 2 or more accredited					

Member Satisfaction (Yearly Performance)			
MPI Chapter Satisfaction Survey	FY 21 - 22	FY 22 - 23	Incentive Key:
Satisfaction Rate:	65%	0%	1 Point = 51% - 54%
Satisfaction Response Rate:	17%	0%	2 Points = 55% or Higher
Satisfaction Response Count:	69	0	

* A minimum of 12% of membership respondents is recommended to achieve valuable, actionable data.

CHAPTER PERFORMANCE REVIEW



CHAPTER PERFORMANCE & METRICS SUMMARY REPORT



<INSERT CHAPTER NAME>

FY2025 Annual Performance & Metrics Summary Report

This Performance & Metrics Summary has been modified for Chapter Performance measurement and results are based on achievements for Fiscal Year 2025. Performance measurement has been simplified with focus on the (3) most critical areas for Chapter sustainability: Membership, [Finance](#) and Education.

Your Chapter Dashboard measures your Chapter's performance against MPI Chapter Bylaws and MPI Chapter Policy Manual for minimum Chapter performance standards to maintain your Chapter's charter as well as best operational practices for fiscal sustainability, operational health, and membership engagement. This summary provides a snapshot of Chapter performance highlighting the critical elements: Membership, Education and Finance, and identifies opportunities for action and growth.

Additionally, this summary tracks Metric Incentives earned based on performance. All Chapters will be recognized, and incentives awarded at the Annual Chapter Performance Awards which takes place in April.

MEMBERSHIP SATISFACTION & GROWTH	Objective	Target	Standards	Metrics
	MEMBER SATISFACTION	Needs Improvement = 60% or lower		
		Sustaining / 1 Metric Incentive Point = 61 - 70%		
		High Performing / 2 Metric Incentive Points = 71% or higher		
	MEMBER RETENTION WITHOUT STUDENTS	Needs Improvement = 68% or lower		
		Sustaining / 1 Metric Incentive Point = 68.1 - 73%		
		High Performing / 2 Metric Incentive Points = 73.1% or higher		
	NET MEMBER GROWTH WITHOUT STUDENTS	Needs Improvement = 1% or lower		
		Sustaining / 1 Metric Incentive Point = 1.1 - 5%		
High Performing / 2 Metric Incentive Points = 5.1% or higher				

EDUCATIONAL EVENTS	Objective	Target	Standards	Metrics
	EDUCATION SATISFACTION	Needs Improvement = 4.21 or lower		
		Sustaining / 1 Metric Incentive Point = 4.22 - 4.32		
		High Performing / 2 Metric Incentive Points = 4.33 or higher		
	EDUCATIONAL/ACCREDITED EDUCATIONAL EVENTS	Needs Improvement = 3 or fewer events		
		Sustaining / 1 Metric Incentive Point = 4 or more educational events		
High Performing / 2 Metric Incentive Points = 4 or more educational events, of which 2 or more are accredited				

FINANCE	Objective	Target	Standards	Metrics
	NET PROFIT	Needs Improvement = 2% or lower		
		Sustaining / 1 Metric Incentive Point = 2.1 - 5%		
		High Performing / 2 Metric Incentive Points = 5.1% or higher		
	RESERVES % OF FIXED ANNUAL OPERATING EXPENSES	Needs Improvement = 25% or lower		
		Sustaining / 1 Metric Incentive Point = 25.1 - 75%		
High Performing / 2 Metric Incentive Points = 75.1% or higher				

TOTALS			Standards	Metrics
CHAPTER OF EXCELLENCE – Achieve “High Performing” status in 7 out of 7 focus areas.			HP -	
TOP PERFORMING CHAPTER – Achieve “High Performing” status in 6 out of 7 focus areas.			SUS -	
CHAPTER OF MERIT – Achieve highest performance over all Chapters in a specific focus area.			NI -	

METRICS INCENTIVE PLAN



The Performance & Metrics Summary Report will track Metric Incentives earned based on performance.

Maximum points available – 14 points

1 complimentary preferred level new membership or membership renewal for a planner or supplier. Renewal certificates may only be offered to members who have not yet renewed for the next calendar year	4 points each
1 complimentary registration for a 4-hour (select) MPI Academy Certificate Course (digital delivery only) for a Chapter Member	3 points each
20% off a membership renewal or new membership (discount certificates may only be offered to members who have not yet renewed for the next calendar year.)	1 point each



CHAPTER AWARDS RECOGNITION



CHAPTER OF EXCELLENCE



2024 CHAPTER AWARD

TOP PERFORMING



2024 CHAPTER AWARD

Categories tracked: Member Satisfaction, Member Retention, Net Member Growth, Net Profit, Reserves, Education Satisfaction, Accredited Educational events. Results are determined through chapter dashboard results and Chapter Performance & Metric summaries.

Chapter Merit Award: winners achieved highest performance over all chapters in a specific **focus area**.

Top Performing: winners achieved “High Performing” status with a minimum **6 out of 7 focus areas** of chapter management or membership satisfaction.

Chapter of Excellence: winners achieved “High Performing” status in **7 out of 7 focus areas** of chapter management and membership satisfaction.



SIGNATURE EVENTS





When we **meet**, we change the world. SM

