

# District Success Plan

## Team Composition

Name the members of the district's core team.\*

District Director - Kim Purohit

Program Quality Director - Bill Moylan

Club Growth Director - Renette Gordon

Immediate Past District Director - Shirley Thomas

Finance Manager - Brian Laskey

Public Relations Manager - David Clarke

Administration Manager - LaShon Bowers

Logistics Manager - Von White

All Division Directors

All Area Directors

Name the members of the district's extended team.\*

District Director Team with various committees to be formed for District projects

-District Education Team including Team Pathways,

-Conference Co-Chairs, Chief Judge, TLI Trainers

-District Club Growth Team including Club Extension Chair, Retention Chair, Quality Chair, Demo Team

-District Council & other club officers

## Values

Toastmasters International's core values are integrity, dedication to excellence, service to the member, and respect for the individual. These are values worthy of a great organization and should be incorporated as anchor points in every decision made within the organization. Toastmasters' core values provide a means of guiding and evaluating the organization's operations, planning, and vision for the future.

What are the district's core values?\*

Commit to a standard of excellence in all endeavors. Maintain a high level of integrity. Offer service to all members. Focus on communication and understanding of members' needs. Strive to enhance each members' experience and opportunity for growth.

## Team Operating Principles

What principles does the team hold? (These principles might include trust, safe learning, collaboration, etc.)\*

Team will adopt the Toastmaster International principles.

## Potential Obstacles

What obstacles will the team have to consider when strategizing? (These might include conflicting personal commitments, distance, unresolved conflict, etc.)\*

- Some team members are likely to have conflicting schedules due to other commitments, but these can be worked through with cooperation among the team.
- Quick response to leads, and/or other issues may be difficult due to team members full-time jobs.
- Several members are working on DTM through legacy program, may not embrace Pathways during this time. Pathways adoption may be affected.
- Inability of members in some existing clubs to mentor new club members on Pathways due to lack experience or training.
- Unknown if seasoned members will renew membership at the end of year when legacy program no longer available.
- Several clubs with zero education awards and low membership.

## Meeting Protocol

In general, how will the team process tasks? (For example, consider how often to meet or call, what the team's meeting practices will be, etc.)\*

DEC meetings scheduled with 9 in-person meetings and one online meeting.

Trio/Quad calls twice monthly on established schedule, Monday evenings 7:00 pm, typically 2nd and 4th weeks, to be adjusted as necessary. When/if necessary, unscheduled Trio/Quad calls.

Virtual meetings if necessary due to bad weather or other conditions. Additional in-person Trio/Quad meetings as needed or appropriate.

## Team Interactions and Behavioral Norms

How will decisions be made?\*

Decisions made based on best action for the district membership and for meeting district goals.

Budget items will be discussed with team and Finance Manager for guidance on protocol. Decisions for Program Quality and for Club Growth made by PQD and CGD for their respective roles and always in accordance with Toastmaster International's practices and protocols. Consult with Toastmasters International WHQ, if necessary, for additional information to make specific decision.

What will be the team's method of communication? Determine the team's first preference, second preference, and so on.

Trio to Trio / Quad to Quad

1st: Email when it includes details, dates, protocols or any other communication that needs to be documented in writing.

2nd: Text for shorter and/or urgent messages, not-detailed.

3rd: Phone when it is the most appropriate for the situation.

Use best judgement based on circumstances.

What will the communication parameters be? Parameters might include whether the team communicates by phone or email, whether the team sets up a weekly conference call, or how often team members can expect to communicate.

Trio/Quad team will follow the method of communication mentioned above for normal circumstances.

From Trio/Quad to extended team: 1st Email when it includes details, dates, protocols or any other communication that needs to be documented in writing.

2nd: Text for shorter and/or urgent messages, not-detailed. 3rd: Phone when it is the most appropriate for the situation.

Trio/Quad will schedule phone or in-person meetings with their teams as needed.

Draft agenda will be sent prior to meetings for review and correction, if necessary.

How will the team resolve differences of opinion?

Each team member to provide succinct explanation of their point of view, and in turn listen to the other team member's point of view. If circumstance requires it, TI protocol is first guide for resolution. In other circumstance with a difference of opinion, leave out emotion, go back to core values to come to a resolution. Throughout, treat all team members with courtesy and respect. Team agrees to accept the resolution to the problem or conflict and work together toward the goal.

How will the team support one another?

Courtesy, respect, honesty. Open communication among the team.

How will the team ensure equitable participation when completing activities?

Division of Trio Responsibility for various District activities, functions as well as responsibility for other district leaders.

District Director is responsible for: Financial Manager, Administration Manager, Parliamentarian, Public Relations Manager, Logistics Manager, Speakers Bureau. Webmaster and Newsletter through the PR Manager, Division Directors, Area Directors and oversees/supports the plans/activities of Program Quality Director and Club Growth Director.

Program Quality Director is responsible for: Training Team, Conference Chairs, Conference Presenters, Keynote Speaker, Pathways Team, District Contest Teams.

Club Growth Director is responsible for: Club Extension Chair, Club Quality Chair, Club Retention Chair.

How will team members be held accountable for their responsibilities?

Use the duties and responsibilities outlined in the Toastmasters Leadership Handbook as our guide for responsibilities. Use Toastmasters manuals and documents that provide details about job requirements. Review Governing Documents, particularly Policies and Protocols.

Distribute the Toastmaster District Officer Competencies to all District Leaders.

Trio/Quad calls to keep team members informed of current activities and discuss any issues that need to be resolved.

How will the core team and extended teams be recognized for their efforts?

Recognition published in District Newsletter and website for special achievements.

Recognition and token awards at the DEC meetings

DEC members asked to set a Toastmaster goal with recognition at DEC meetings as goals are met

Recognition of Division Directors, Area Directors and members who are involved in new club leads that charter.

## **Membership Payments Growth**

### **Situation Analysis**

What is the current situation in the district? How many members did the district add last year? Does the district have special challenges? (One situation might be that membership payments usually arrive close to deadline making it necessary to hurry to meet goals.)\*

Starting the year with 114 clubs in good standing. Four clubs with low membership and three others that are likely to close. Many clubs with zero education awards which seems to indicate that members are not engaged, and may not maintain membership. Many clubs below 12 members qualified for a club coach.

Note: Two clubs with low membership were able to add members to return to good standing.

### **Strategy**

What actions will the district take? What has worked in the past? What has not? What new programs or incentives could the district implement? How will the district promote existing programs? How have other districts been successful? What could the district do to stretch this goal? (The strategy might include actions, such as creating a contest promoting early submission of dues.)\*

Host and publish a series of webinars on topics to energize and retain current members. Provide clubs with Open House support by providing list of available member speakers who can provide keynote speeches. Offer reimbursement of \$30 toward expenses to clubs that host an Open House, budget and receipts required. Reward clubs that increase membership by 5 members during 3 Toastmaster Membership Contests. \$50 for a TI gift certificate or a pizza party for the club.

Action 1

Develop a schedule, list of topics for webinars. Identify presenters and software for webinars

Action 2

Develop a list of members who are available to speak at clubs for Open House or club meetings

Action 3

Publicize and actively encourage all three Toastmaster International Membership contests

Action 4

Develop requirements/qualifications for additional incentive awards to clubs for increased membership

## Action 5

Develop procedures for clubs to claim incentives

## Resources

What people, equipment, meeting places, and money does the district have at its disposal? What committee could work toward the goal? Are any members interested in heading projects toward leadership goals? How much money has been budgeted for achieving this goal? (Resources might include area and division governors and gift certificates to the Toastmasters store.) \*

- District Leadership to provide support and encouragement to Club Growth Team.
- Club Retention Chair, Division and Area Directors.
- Members who are available to speak at club Open Houses
- Speakers who can make presentations from Toastmaster series on leadership and club excellence.
- Webinar platform.
- Club coaches.
- Public Relations team to promote membership contests and incentives.
- New club mentors.
- Various district assets, established meeting locations. District budget for membership retention activities.

## Assignments

Who is in charge of each action? Who is on each team? What are each team member's specific responsibilities?\*

- Club Growth Director is the lead for membership retention and growth.
- Club Retention Chair and team to train and support club coaches.
- Club Retention Chair team to support retention by providing training to club members on building membership.
- Members who will participate in creating webinars.
- Public Relations team to promote membership contest and any other activity or program relating to membership retention and growth.

### Action 1\*

Club Growth Director develops and builds the Club Retention Team

### Action 2\*

Publicize the need for coaches, recruit and create a process for members to apply.

### Action 3

Prepare schedule for training of club coaches, create or obtain material for training workshop

### Action 4

Prepare a process to receive a coach request from a club, to assign the club coach, and to track coach's successes.

Action 5

Contact the Public Relations team to publicize the workshops and schedule.

## **Timetable**

When will each action item begin? When will each action item be complete? How will progress be tracked?\*

Club growth activity will begin July 1 and be ongoing throughout the year.

Basic team development will be completed by August 15, 2019

Club Growth Director will oversee the development of processes and procedures to track activity.

Action 1\*

Club Growth Director will analyze the district's needs for membership retention and membership growth - ongoing.

Action 2\*

Club Growth Director will use analyses to recruit appropriate team members for club retention

Action 3

Club Retention Chair will create procedures by mid-August

Action 4

Club growth team will produce/obtain training material and schedule training workshop by mid-August

Action 5

Workshop for club coaches, along with sponsors and mentors will be presented on September 7, 2019

## **Club Growth**

### **Situational Analysis**

What is the current situation in the district? How many clubs did the district add last year? Does the district have special challenges? (One situation might be that members in the district don't know how to generate interest in new clubs.)\*

Four clubs were added last year, though we started the year with 124 clubs and started this year with 114 clubs in good standing. Members do not know how to generate new club leads. Corporate clubs struggle with membership due to changing jobs, relocation, business travel. Demo meetings for corporate clubs can be a challenge as often employed members are not available at lunchtime to take part.

## Strategy

What actions will the district take? What has worked in the past? What has not? What new programs or incentives could the district implement? How will the district promote existing programs? How have other districts been successful? What could the district do to stretch this goal? (The strategy might include actions, such as appointing a club extension chair to pursue leads and scheduling demonstration meetings.)\*

Approach both community and professional organizations that may have a need for Toastmasters benefits. Follow leads that are submitted by members and the Toastmaster lead generation program. Work with Club Growth Directors in other districts for referrals to companies in our district that may have corporate clubs located in other districts to ask for potential contacts in the local company branch. Attend association conferences to engage others regarding Toastmasters benefits. Training Division and Area Directors on club growth procedures at DEC meetings. Create incentives for sponsors and mentors who guide a prospective club to charter. Clubs that charter within three months will receive a club banner from the district.

### Action 1

Identify community and professional organization along with corporations that may have a need for Toastmasters benefits.

### Action 2

Ongoing preparation for training of Area and Division Directors at the DEC meetings.

### Action 3

Sponsors inform prospective clubs of the district-provided banner-incentive for chartering within three months.

### Action 4

Determine common companies in other districts, contact the CGD in that district and request help in obtaining local contact information.

### Action 5

Determine conferences that are appropriate to district growth goals.

## Resources

What people, equipment, meeting places, and money does the district have at its disposal? What committee could work toward the goal? Are any members interested in heading projects toward leadership goals? How much money has been budgeted for achieving this goal? (Resources might include a club extension committee, a demonstration team, and [infokits@toastmasters.org](mailto:infokits@toastmasters.org).)\*

- District Leadership to provide support and encouragement to Club Growth Team.
- Club Quality Chair, Club Extension Chair, Division and Area Directors.
- Club sponsors and new club mentors.
- Various district assets, established meeting locations. District budget for club growth activities.
- Toastmaster Lead Management system and marketing plan.

- Public Relations team to promote Toastmasters benefits.

## Assignments

Who is in charge of each action? Who is on each team? What are each team member's specific responsibilities?\*

Club Growth Director is the lead for developing new clubs.

Club Extension Chair will follow up with leads, establish contact with prospects, schedule kick off meetings, recruit/assign sponsors, track progress to charter

Club Quality Chair recruits new club mentors who are able to establish Toastmaster meeting protocols in prospective/newly chartered clubs, attend their meetings and encourage prospective members to recruit members needed to charter the club.

Action 1\*

Club Extension Chair to develop a procedure and team to follow leads, qualify leads, and schedule the kick off meetings and report current activity to district leadership

Action 2\*

Club Growth Director or Club Extension Chair set up procedure and schedule to maintain and update the TLM leads, assign and track sponsors

Action 3

Club Quality Chair to publicize the need for club mentors and create a method for members to apply for positions and to track applications

Action 4

Club Growth Director and/or Club Quality Chair to develop/obtain training material for sponsors and/or mentors, schedule training sessions

Action 5

Club Quality Chair to track progress of mentors and provide report to district leadership

## Timetable

When will each action item begin? When will each action item be complete? How will progress be tracked?\*

Club growth activity will begin July 1 and be ongoing throughout the year.

Action 1\*

Identify Club Extension Chair

Action 2\*

Build Club Extension Team to identify, train and monitor new club sponsors

Action 3



#### Action 4

Club growth team will produce/obtain training material and schedule training workshop by mid-August

#### Action 5

Workshop for club coaches, along with sponsors and mentors will be presented on September 7, 2019

## Distinguished Clubs

### Situation Analysis

What is the current situation in the district? What percent of district clubs are typically Distinguished? Do members understand how to achieve success? Does the district have special challenges? (One situation might be that members in the district don't know how to achieve success.)\*

Distinguished clubs reduced by 30% in previous year. Established corporate clubs may not be using Pathways due to lack of training. Newly chartered clubs may also need additional training but they don't tend to attend TLIs. Several clubs have 0 educational awards. New members may not have sufficient information, mentoring, training on how to use Pathways. Some reluctance from established members to adopt Pathways. Many clubs earn the points to be a distinguished club, but may be one or two members short. Difficulty in recruiting new members in these clubs.

### Strategy

What actions will the district take? What has worked in the past? What has not? What new programs or incentives could the district implement? How will the district promote existing programs? How have other districts been successful? What could the district do to stretch this goal? (The strategy might include actions, such as training all area and division governors on the Distinguished Club Program.)\*

The district will continue the Town Hall meetings started in the previous year for each of the eight divisions between mid-September and December 31, 2019. All club members will be invited to attend to share their success, concerns, ideas and other comments to help leadership more closely determine the needs of members, and to learn about their obstacles. Division directors will be encouraged to hold council meetings with area directors, and area directors will be encouraged to hold council meetings with club officers. These meetings will maintain a flow of information both to and from the clubs with the desired effect of continual knowledge of the members needs and successes. Provide the Leadership Competencies to district leaders. Schedule workshops on various topics that will engage membership and re-ignite enthusiasm for the educational program. Goal is to have engaged members in thriving clubs that will show their success by earning a distinguished status.

#### Action 1\*

Town Halls will be scheduled by District Director, with assistance from Division Directors to book venue and provide snacks.

#### Action 2\*

Train area directors at DEC meetings to analyze club performance and discuss with club officers

#### Action 3

Encourage and mentor members through Level 1, then ask them to use the Pathways Mentoring Guide

#### Action 4

Establish incentive program targeting clubs that have no, or very few, educational awards

#### Action 5

Create workshops and webinars that guide members through Pathways levels.

## Resources

What people, equipment, meeting places, and money does the district have at its disposal? What committee could work toward the goal? Are any members interested in heading projects toward leadership goals? How much money has been budgeted for achieving this goal? (Resources might include area and division governors and the Distinguished Club Program and Club Success Plan (Item 1111).)\*

District leaders and officers are resources. District members who are education professionals along with other members who are interested and motivated to join educational committees. Team Pathways members who are developing plans for continuing education for members who are at different levels in Pathways. Conference chairs and other conference committee chairs. Division and area directors who monitor club progress and encourage participation in the educational program. District has AV equipment and necessary equipment for workshops, established venue for DEC meetings and the ability to use the venue for after-DEC meetings and workshops. Established venues for summer and winter TLIs, with several experienced trainers who volunteer for officer training. Budget includes funds for TLIs, for training workshops that support clubs in achieving excellence and earning distinguished status.

## Assignments

Who is in charge of each action? Who is on each team? What are each team member's specific responsibilities?\*

Program Quality Director will oversee TLI agendas and officer training teams. TLI sessions, outside of breakout sessions for officers, will be developed to meet the needs of membership. Free standing workshops will present topics that support clubs in the educational program. Recognition of the distinguished clubs will be part of the conference with awards to these clubs. Public Relations team will publish recognition during the year of outstanding members or clubs to recognize accomplishments and recognition will be published in the district newsletter and website by Public Relations Manager and webmaster.

#### Action 1\*

District Director and Division Directors will schedule Town Hall meetings for all 8 divisions

Action 2\*

Program Quality Director will provide division and area director training at DEC meetings.

Action 3

District will schedule DEC meetings throughout the year and District Director will schedule training time at DEC meetings.

Action 4

Team Pathways will develop plan for continued education, and for training at TLIs and at the annual conference.

Action 5

Program Quality Director will establish an incentive program for the educational program.

## **Timetable**

When will each action item begin? When will each action item be complete? How will progress be tracked?\*

Training of new club officers begins in June of the previous year and continues as needed through the end of August. Division and area directors will be trained at the first DEC meeting, and make up sessions will be provided through September 30, as needed, with the goal of minimum 85% trained. Team Pathways will begin their planning for the educational program in July and continue with conference calls throughout the year. Training sessions will start as soon as the plans are firm and training sessions can be scheduled, starting in September 2019.

Action 1\*

Four or five Town Hall meetings scheduled starting in mid-september, or after the September Business Meeting is complete.

Action 2\*

Division and director training scheduled to begin on July 13, 2019 and end by September 30, 2019

Action 3

Make up training for directors will be scheduled after August and September DEC meetings, with ongoing director training throughout the year at DEC meetings.

Action 4

Continuing education for Pathways began at the summer TLIs, June 15, June 22 and July 17, and will continue at makeup TLIs through August 2019.

Action 5

Program Quality Director will finalize and publish the educational incentive program no later than mid-September.

## **Additional Goals**

Training for district contests from the club level to the district level. Includes training voting judges, chief judges, provided by the district Chief Judge, and training for contest chairs, functionalries, and contestants with the purpose of increasing the quality of district contest.

Schedule the 5th annual Leadership Orientation to introduce membership to leadership opportunities in the district. Provide information on various positions, the requirements and responsibilities and emphasize the growth of communication and leadership skills possible through these opportunities.

## **Situational Analysis**

What is the current situation in the district? Do members understand how to achieve success? Does the district have special challenges? (One situation might be that areas and divisions have reached their maximum capacity causing service to the members to suffer and limiting leadership opportunities.)\*

The past year contest season had many contests that were not well presented due to lack of training and/or experience of contest chairs and other functionaries. With additional training by members who are very knowledgeable on contest protocol, rules and customs, the quality of district contests will be elevated.

Interest in leadership positions in the district is weak. Three area directors positions are not filled by September 1, with many members declining for various reasons, one of which may be fear of the unknown. Other positions have been hard to fill as well. The reluctance to serve is seen in both long term positions such as area directors or club growth positions, as well as short term or temporary assignments for district projects.

## **Strategy**

What actions will the district take? What has worked in the past? What has not? What new programs or incentives could the district implement? How will the district promote existing programs? How have other districts been successful? What could the district do to stretch this goal? (The strategy might include actions, such as *assigning an alignment committee to determine best options for realignment and collaborating with the nomination committee to identify leadership opportunities.*)\*

Training will be provided by the Chief Judge to voting judges with emphasis on the judging criteria rather than emotional response. Chief judges will be trained to properly brief voting judges, handle objections, apply the tie breaking judges decisions, when needed, as well as how to oversee timers and ballot counters., Also how to deliver contest results in a clear way to the functionary who will announce the result. All will be trained on the importance of knowing the rules and using the rule book.

Contest functionaries will be trained in the protocol to present a professional contest, starting and ending on time, contestant briefings, and all other items that are needed for a well-run contest.

Contestants will receive advice and counseling from past district winners of the International Speech

Contest or those who have won the Humorous Speech contest at the district level. They will learn how to develop a winning speech, how to be comfortable doing so, how to be sure the material meets the originality rule, and what is appropriate for the International Speech.

The Leadership Orientation will take place at a venue, where tables will be arranged trade show style and manned by experienced leaders who will answer questions and explain the requirements of the various leadership roles in the district. The event will follow the format that was established in the first two years.

Action 1\*

Contests - develop material for training contest chairs, functionaries and contestants. Identify the participants who will help with training.

Action 2\*

Schedule the workshops, publicize the dates and content to district membership

Action 3

Schedule workshops for voting judges and chief judges. Publicize the dates and content to district membership

Action 4

Leadership Orientation - appoint Committee Chair who will recruit other members. Identify district leaders who will man the various tables and answer questions.

Action 5

Leadership - schedule and publicize the event. Track those who attend and their leadership interests for district leadership.

## **Resources**

What people, equipment, meeting places, and money does the district have at its disposal? What committee could work toward the goal? Are any members interested in heading projects toward leadership goals? How much money has been budgeted for achieving this goal? (Resources might include past district directors, area and division director, the district website, and a nomination committee.)\*

District members who have a high degree of experience and expertise in contest protocol, and customs. Members who are knowledgeable in the judging criteria used by voting judges and those who have experience and expertise in the role of Chief Judge.

District leaders, past and present, who are willing to participate in the Leadership Orientation and talk to potential district leaders and share their knowledge and experience with those who are interested in the district and want to know more about the leadership roles.

Resource include district assets such as AV equipment, established venues, budget to fund these workshops.

## Assignments

Who is in charge of each action? Who is on each team? What are each team member's specific responsibilities?\*

Contest functionaries, etal. - chaired by Shirley Thomas, DTM IPPD, and her team.

Contest judges - chaired by Carlyle Carvalho, District Chief Judge

Leadership Orientation - Committee Chair to be determined.

Action 1\*

Develop training agenda and material for contest functionaries and contestants

Action 2\*

Identify participants, venues, schedule dates, publicize to membership

Action 3

Develop training agenda and material for voting judges workshop and chief judges workshop, schedule dates, publicize to membership

Action 4

Leadership Orientation - Identify participants, venue, schedule and publicize to membership

Action 5

Create registration for all of the above events, request the Public Relations team to publish in the district newsletter and website.

## Timetable

When will each action item begin? When will each action item be complete? How will progress be tracked?\*

Planning and scheduling is underway as of mid-August for contest functionaries

Judges workshops and schedule will be handled by the chief judge within September.

Leadership Orientation Committee Chair will be identified by mid-September, with planning to start asap

Action 1\*

Contest functionaries training scheduled in October and November 2019, morning session

Action 2\*

Panel discussion for potential contestants with past winners at District level, afternoon session

Action 3

Voting Judge training, likely be webinar, to be available prior to contest season, club level begins on December 1, 2019

Action 4

Chief judge training, likely by webinar, to be scheduled prior to contest season, club level begins on December 1, 2019

Action 5

Leadership Orientation event to be scheduled prior to the deadline for nominations for district leadership