

District Success Plan Summary**2017-2018****District 39****District Success Plan****Team Composition**

Name the members of the district's core team.

District Director Zack Souza, DTM
 Program Quality Director Jane Taff, DTM
 Club Growth Director Wes Johnson, DTM
 Public Relations Manager Kristi Beres, DTM
 Administrative Manager Noralee Cole, DTM
 Finance Manager Lena Oselsky
 Logistics Manager Bob Blymyer
 Immed Past District Director Sondra Nunez, DTM
 Webmaster Amrik Chima

Name the members of the district's extended team.

Division Directors: Matthew Greiner, John Velasco, Eva Price, Ramiro Jiminez, Kathie O'Ray,
 Veena Vijayaraj-Kadidal, Grace Frasche, Jon Cullifer, Doug Bloom, Eliza Yam
 Division Councils: APQDs, ACGDs, Chief Judges, Area Directors

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?

Motto: "Our Journey Begins" Reflects the new Pathways Education Program
 TM: Integrity Respect Service Excellence
 D39: Focus on the Harvest; Encouragement not Interference; Model the Way
 "Every member deserves to belong to a distinguished club"

Team Operating Principles

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

Trust is a must, Open discussion & communication, collaboration, operate from enjoyment,
 success mindset, professional attitude, willingness to listen and learn from others

Potential Obstacles

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

District 39's geography is vast with a few major metro areas. The district also has strong personalities, and many activities that may not serve the District Mission, "We build new clubs and support all clubs in achieving excellence." The District Director has a fulltime job, the PQD is an entrepreneur with family and church commitments. The CGD has a family, fulltime job and other commitments, and he lives one hour away from the other TRIO members.

Pathways Program will impact our District in a major way -- prior rollouts have shown that long-time members are more resistant and we have many long-time members in our District.

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.)

District Executive Committee Meetings: July, August, October, January, February, April
 Conferences: November, May
 Division Director conference calls: Monthly, last Monday of the Month
 Trio Conference Calls: Weekly at first, TBD ongoing
 Trio carpools: As time allows

Team Interactions and Behavioral Norms

How will decisions be made?

Core members and extended team members will meet in person, conference call or email to discuss decisions needed to benefit the members.
 Core members will meet regularly to discuss and determine any decisions of courses of action needed to ensure the success of the district.
 Teams will work to build a consensus and provide proposals. If a decision has to be made, the TRIO will review and make the decision based on the district mission.

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

Email; Text Messages; Conference Call; In person; collaboration software (ie Slack, Zoom, Google Docs)

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.

Core and extended team members will use the following options:
 1. Text correspondence as needed; email for documents
 2. Conference calls or in person meetings as scheduled
 3. 24 hour turn around on email responses (when appropriate)

How will the team resolve differences of opinion?

All core and extended team members will be encouraged to openly and honestly listen to and discuss all opinions. If a decision cannot be made due to differences of opinions, experienced Toastmasters such as Past District Governors/Directors, Past International Directors and Past or Present Regional Advisers will be asked for guidance.

How will the team support one another?

All team members will be encouraged to publicly and privately treat each other with respect, patience and kindness. All team members, regardless of title, will be treated as equals.

How will the team ensure equitable participation when completing activities?

Core and extended team members will be encouraged to work toward a common agreement on which duties will be completed by each team member. Level of experience, time availability and personal and professional obligations should be taken into account when team members commit to activities or tasks.

How will team members be held accountable for their responsibilities?

Core team members will be encouraged to submit monthly written and verbal reports to advise the team of both successful accomplishments and possible challenges to meeting area, division and district goals.

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

Team members may be recognized by one or more of the following:
 1) Verbal, public recognition
 2) Recognition via social media, website, district newsletter
 3) Trophies, ribbons, gift certificates

Goal 1: 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.)

In 2016-2017, we lost 9 clubs and 212 members.
 62% of D39 clubs have less than 20 members. Clubs need a membership building program.
 Program change (Pathways), clubs not following best practices (club culture), and vast geography, need for better training.

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.)

Membership retention & growth depend on membership satisfaction, perceived value and converting prospects to members. The district will ensure all clubs are doing Moments of Truth and Club Success Plan to help meet these goals.

Improve membership satisfaction by focusing on needs of existing members by addressing issues that effect satisfaction in TM program.
 Every club focused on growth of 2 new members every quarter.
 Increased membership growth activities that increase visitors

Action 1

Member Retention - Perform Membership satisfaction surveys quarterly. Evaluate survey results and incorporate constructive suggestions into district program when possible. Also communicate our quarterly results and suggestions to Division Leadership.

- Action 2 Value - Communicate Value by adding useful content to D39 website like member Toastimonials, tips, building community through an online district quarterly newsletter.
- Action 3 Quality & Value - Ensure member retention and member growth through focusing on club best practices. The club best practices will be communicated throughout the year via training, blogs, etc. This adds to the perceived value of D39 Toastmaster clubs.
- Action 4 Increase prospect visits through improved Club Visibility - teach website Search Engine Optimization to clubs through the Club Fitness Program.
- Action 5 Membership Growth - training on prospect/guest conversion - encourage all members read and understand the prospect to guest to member pamphlet. Share success stories on district website showing how prospects were converted to members.

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 directors and gift certificates to the Toastmasters store.)

District will provide resources.
 Retention = Club Coach Committee, Club Fitness Committee
 Value = Club Coach Committee, Club Mentor Committee, Club Fitness Committee
 Visibility = Club Coach Committee, Club Mentor Committee, Club Fitness Committee
 Growth = Club Coach Committee, Club Mentor Committee, Club Fitness Committee

Assignments

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

District Marketing Team Chairs will decide how to break up the responsibilities.

- Action 1 Club Retention Chair & Club Coach Committee - Put together membership satisfaction survey
District Marketing Team - Reviews/evaluate survey results - address
- Action 2 District Marketing Team, Public Relations Mgr, Webmaster & web team - Quarterly Newsletter
- Action 3 District Marketing Team, Public Relations Mgr, Webmaster & web team - The club best practices communicated throughout the year via training, blogs, etc.
- Action 4 Club Fitness Chair & Club Fitness Committee - teach website Search Engine Optimization to clubs through the Club Fitness Program.
- Action 5 District Marketing Team, Public Relations Mgr, Webmaster & web team - prospect conversion - help all members read and understand the prospect to guest to member pamphlet.

Timetable

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

Most of these Action items are ongoing quarterly processes
 Quarterly actions will begin on the first month of each quarter: January, April, July, October
 Quarterly actions will end on the last mont of each quarter: March, June, September, December
 Some Actions are related to COT/TLI events
 First Training: Between June 1 and August 31.
 Second Training: Between December 1 and February 28.

- Action 1 Quarterly perform satisfaction survey
- Action 2 Quarterly publish district newsletter
- Action 3 Club best practices will be communicated throughout the year via training, blogs, newsletter, etc.
Training at TLI & COT. Blogs periodically. Newsletter Quarterly
- Action 4

Club Fitness Chair & Club Fitness Committee - teach website Search Engine Optimization to clubs through the Club Fitness Program - Quarterly cycle

Action 5

Membership Growth - training on prospect/guest conversion - encourage all members read and understand the prospect to guest to member pamphlet. Share success stories on district website showing how prospects were converted to members. - Monthly or bi-Monthly

Goal 2: Club Growth

Situation 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.)

2016-2017 9 clubs lost

New club building challenges:

Members in remote locations may not know how to generate interest in new clubs.

Not enough Club Sponsors & Mentors in remote locations

Goal: 1 net new club per Division; 5% net club growth in District

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 appoint -ing a club extension chair to pursue leads and scheduling demonstration meetings.)

Focus on training division directors and area directors on club building

Focus on training more sponsors & mentors in each division & area

Focus on developing & using Assistant Division Director CG in Divisions.

Action 1 Div Dir., Area Director Training - Club Builder Training

Action 2 Establish a Club Demo Team in every Division

Action 3 Recruit & Train Sponsors

Action 4 Recruit & Train Mentors

Action 5 Assign Club New Source Research Chair

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.)

District Marketing Team

Club Extension Committee

Club Demo Team

Club Mentor Committee

Assignments

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

Each Chair will work with District Marketing Team & their committee to complete assigned actions.

Action 1 Extension Chair & Sponsor Committee - Div Dir., Area Director Training - Club Builder Training

Action 2 Extension Chair & Sponsor Committee - Establish a Club Demo Team in every Division

Action 3 Club Extension Chair & Sponsor Committee, Recruit & Train Club Sponsors

Action 4 Club Quality Chair & Mentor Committee, Recruit & train Club Mentors

Action 5

Club Growth Director - Assign Club New Source Research Chair

Timetable

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

Training Events usually happen in July & December
Recruit & Train Sponsors & Mentors on a Quarterly basis, more frequently if the need is there.

Action 1 July , December - Div Dir, Area Dir training include Club Building Activities

Action 2 Establish a Club Demo Team in every Division

Action 3 Recruit & Train Sponsors Quarterly

Action 4 Recruit & Train Mentors Quarterly

Action 5 August 1 - Assign New Club Source Research Chair

Goal 3: 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.)

40% or more clubs in District 39 are typically Distinguished or better each year.
25% of clubs miss being distinguished due to lack of membership.
Analysis indicates the biggest road block to distinguished clubs have to do with membership thresholds.
The district consistently produces education awards and a high percentage of trained club officers.

Pathways will impact DCP achievements -- learning curve challenge for both clubs and members in submitting awards.

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 directors on the Distinguished Club Program.)

In 2016-2017, the District created a Divisional Leadership Model. In 2017-2018, the District will continue to support the Divisional Leadership Model to support division directors in leading their Areas and, ultimately, Clubs to success. Our DCP incentives will include a membership component. Our club officer training programs will include Success 101, "Recruit, Retain, Reward" components.

Goal: Retain all members; Clubs gain 2 members every quarter.

Action 1 Incentivize membership development and retention programs

Action 2 Set COT expectations to include Success 101, "Recruit, Retain, Reward" components.

Action 3 Empower division directors to recruit Assistant PQDs to manage and implement club officer training.

Action 4 Educate Area Directors on all aspects of successful DCP clubs

Action 5 Provide a resource for Club Quality to help clubs create enjoyable and successful clubs using the Distinguished Club Program.

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 directors and the **Distinguished Club Program and Club Success Plan** (Item 1111).)

The district is committed to provide financial resources, mentors and support to division director and their assistant program quality directors so they may provide effective club officer training and enrichment sessions to their members.

Assignments

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

District CORE and Extended Team Members and COT Trainers

- Action 1 PQD Jane Taff, DTM and District CORE Team
- Action 2 PQD Jane Taff, DTM; Deb Cullifer - District Training Manager; Division Directors & Assist. PQDs; COT Trainers
- Action 3 District CORE and Extended Team Members
- Action 4 PQD Jane Taff, DTM; District CORE Team; District Area Director Training Manager, Joey Waldrop, DTM, PDG
- Action 5 PQD Jane Taff, DTM; District CORE Team; Marty Taub, DTM - District Member Experience Manager

Timetable

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

Each action item will begin immediately and continue throughout the 2017-2018 TM year. The incentives will be tracked by club DCP points earned and through increased club membership. COT: Winter/Summer Sessions: tracking through evaluation forms, DCP points earned and through increased club membership. Recruitment of Division Assist. PQDs completion date target August 31. ADs: Monthly training sessions; tracked evaluations; DCP points earned; increased club membership.

- Action 1 Begins 7/1/17
- Action 2 COTs tracked by evaluations at the conclusion of each session.
- Action 3 Division PQDs by August 31.
- Action 4 AD training will be conducted during several months of the year.
- Action 5 Club Quality: Identify and recruit team members by Aug. 31.

Additional Goals

Answer the same types of questions to reach each additional district goal. Additional goals might have to do with alignment challenges, new leadership opportunities, or better service to members. Where else is there room for improvement in the district?

Goal

What specific, measurable, attainable, and relevant additional goal can the district meet? (An example of a goal is to add one new division and three new areas.)

Guiding Principle: "We forward a divisional leadership model which empowers Area Directors to help our clubs create a dynamic member experience".

1. Reinforce a Divisional Leadership Model & Introduce Area Leadership Model
2. 100% Pathway Guide visits by October 31, 2017
3. Build a dynamic club growth & retention team
4. Deliver 2018 Strategic Plan
5. Graduate Area Directors after 1 year of comprehensive training program

Situation 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.)

Pathways is the biggest change we have. District 57's membership declined from the beta roll-out, and we expect a similar problem. District 39's number one problem is clubs with low membership. 25% of all clubs have 5+ DCP goals, but fail to make distinguished because of lack membership.

District 39 is continuing the Divisional Leadership Model, and looking to the future with a strategic planning committee.

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.)

Phase 1: Division Leadership Model/Area Leadership Model
 Phase 2: Pathways
 Phase 3: Build Growth & Retention Team
 Phase 4: 2018 Strategic Plan
 Phase 5: AD Graduation

Action 1 Reinforce Division Leadership Model and Introduce & Incentivize Area Leadership Model

Action 2 Complete Pathways Guide club visits

Action 3 Growth/Retention Team - Recruit from Division Councils and teams

Action 4 Form 2018 Strategic Planning committee around IPDD

Action 5 Build Area Director Graduation committee

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 governors, area and division directors, the district website and the district nominating committee.)

Division Leadership Model- Staff: Execs, Division Councils, ADs; Resources: Incentives
 AD Graduation- Staff: Form committee; Resources: \$2500 for event/food
 AD recruiting, OAR forms, order badges- Staff: District Director & Division Directors
 Pathways Visits- Staff: District Director, PQD, Chief Guide, Chief Ambassador; Resources: classroom rentals, printing, thumb drives, website
 2018 Strategic Plan- Staff: IPDD, District Director, committee; Resources: TM Intl Plan, printing, meeting rooms

Assignments

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

Division/Area Leadership Model: Execs, Division Councils, ADs, Club Officers
 AD recruiting, OAR forms, order badges: District Director & Division Directors
 Pathways Visits: District Director, PQD, Chief Guide, Chief Ambassador
 Growth/Retention Team: CGD, Division Councils and ACGDs
 2018 Strategic Plan: IPDD, District Director, Strategic Planning Committee, past division directors
 AD Graduation: Form committee: IPDD, committee, ADs and Division Directors

Action 1 Division Leadership Model: District CORE team, Division Directors, Division Councils, ADs and Club Officers will participate

Action 2 Pathways Visits: District Director, PQD, Chief Guide, Chief Ambassador

Action 3 Growth/Retention team: Division Councils and CGDs, Demo teams, others

Action 4 2018 Strategic Plan: IPDD, District Director, Strategic Planning Committee

Action 5 AD Graduation: Form Committee with IPDD

Timetable

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

Phase 1: Division Leadership Model
 Phase 2: Pathways
 Phase 3: Growth/Retention Team
 Phase 4: 2018 Strategic Plan
 Phase 5: AD Graduation

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- Action 1 Division/Area Leadership Model: Start July 1 - Complete 6/30/18

 - Action 2 Pathways: Visit 115 clubs by 9/15/2017; Visit all clubs by 10/31/2017

 - Action 3 Growth/Retention: Build the team and transition to the next team by 6/30/2018

 - Action 4 2018 Strategic Plan: Form Committee by 10/1/2017; Deliver Plan 5/31/2018

 - Action 5 AD Graduation: Form committee December 2017; Select location by December 2017; Target date Summer/Fall 2018

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SUBMIT PLAN