

# District Success Plan

## Team Composition

Name the members of the District’s core team.\*

- District Director: Lance McMahan
- Program Quality Director: Laura Gregory
- Club Growth Director: Donna Lewis
- Club Extension Chair: Louise Houdelette
- Public Relations Manager: Lynda Mendez
- Administration Manager: Sue Eisberg
- Finance Manager: Mirka Johnson
- Logistics Manager: Vacant
- IPDD: Denise Alder Gutherz

Name the members of the District’s extended team.\*

- DIVISION DIRECTORS: Angie Rodriguez (E); Lauren Carly (N); Felicia Borges (W); Chibwe Chungu (S); John Pasamonte (C).
- AREA DIRECTORS: Mary Kay Wagner (E11); King Zed (E12); Rowena Banks (E13); Kathy Broline (E14); Karen Ng (N21); Cole Garcia (N22); Vacant (N23, N24); Denise Flatt (W31); Rose Cooke (W32); Jihane Agdal (W33); Delores Gilbert (W34); MJ Kelly (W35); John Fox (S41); Ernelita Dacumos (S42); Vacant (S43); Duane White (S44); Joey Waldrop (S45); Ramona Marshall (C51); Aria Salehpour (C52); Hue Nguyen (C53); Stephanie Morita (C54); Mery Santos (C55)
- District Parliamentarian: Rick Sydor
- 22/23 Audit Committee Chair: Russ Steele
- 23/24 Audit Committee Chair: Ed Johnson
- Community Judging Chair: Herb Long
- Credentials Community Chair: Vacant
- District Leadership Committee Chair: Denise Alder Gutherz
- Pathways Manager: Angie Rodriguez?
- PDG/PDD Advisors: All are welcome
- ABM Proxy Chair: Denise Alder Gutherz

Realignment Committee Chair: Laura Gregory  
 Technology Manager:  
 Webmaster: Brandon Flatt  
 Zoom Manager: David Betowski

## 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?\*

- Integrity, in everything we do
- Respect for the individual
- Service for the member
- Excellence in service
- Collaboration with all

## Team Operating Principles

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

- Collaboration
- Open Communication
- Positive demeanor
- Open Discussion

## Potential Obstacles

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

- Members per club are slowly increasing. Smaller clubs make it harder to seek out leaders and can lead to burn out.
- Clubs are moving towards hybrid meetings which involves the need for funds to purchase equipment, locating locations for in person meetings and training on new technology.
- Diverse team members with various levels of experience will require being mindful of each other's strengths and weaknesses.
- The team will treat all levels of leadership with respect and helpfulness.
- Geographical separation.

## 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.)\*

The Trio (DD, PQD, and CDG) communicate daily through email, text, or phone, as needed, and meet every Wednesday evening with the AM and PRM, and as needed, the FM. Prior to meeting, each Trio member provides their Accountability Report to the Trio, the PRM, the Admin Manager, and the Division Directors. The Trio discusses accomplishments and plans for the next week, and any issues which require resolution. District Executive Committee Meetings (DECM) will be held twice per year to consider issues prior to the District Council meetings in September and May. The Trio will meet with the Division Directors twice monthly, or as needed.

The quad, Immediate Past PRM, and division directors are participating in Strategic Planning sessions lead by John Pasamonte to develop a longer term plan.

Core team will meet additionally as needed to conduct district business such as Budget and Success Plan. District Leaders will meet with their team on a regular basis. The Trio and PRM will meet with the Regional Advisor in peer calls monthly, and at least twice as a group with the RA before May 31.

## Team Interactions and Behavioral Norms

How will decisions be made?\*

Teams will work together with respect, positivity and collaboration.

Trio members will meet weekly to discuss business.

Items will be voted on by the District Executive Committee and/or District Council, as required.

District Director may consult with Advisors or Advisory team (Past District Governors/Directors), as needed.

Consult the membership of District 39.

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

1. Email
2. Text
3. Phone calls
4. Zoom
5. In person meetings

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.

E-mail correspondence as needed. Use subject line alerts. (with few exceptions, trio members will copy or blind copy each other on all email)

Opening salutation line will contain the individuals who will need to respond or take action on the communication.

Zoom calls or in person meetings as needed.

24-hour turn around on email responses. If more time is needed, provide the date the response will be provided.

How will the team resolve differences of opinion?

All core and team members will encourage open discussion and listen attentively to all opinions.

If team cannot settle differences of opinions the team may reach out together to Past District Directors/Governors. If issues cannot be resolved internally, the Regional Advisor will be consulted for guidance.

How will the team support one another?

All team members will treat each other with respect, patience and kindness, both publicly and privately.

All team members, regardless of title, will be treated as equals.

Unified message from Trio.

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.

When activities are assigned, take into consideration their level of experience, time availability, as well as personal and professional obligations.

How will team members be held accountable for their responsibilities?

Trio members prepare weekly accountability reports which are shared with the PRM, the Administration Manager and the Division Directors prior to the weekly trio meetings. Core team members will submit written and verbal reports at the DECM to advise the District of both accomplishments and possible challenges to meeting area, division and district goals. All DEC written reports are due to the Administration Manager eight (8) days before DEC meetings.

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

- 1) Verbal, public recognition
- 2) Recognition via social media, website, district newsletter
- 3) Trophies, ribbons, gi" certificates, thank you cards

## 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.)\*

Existing clubs and new clubs both impact Goal 1. The PQD is the lead for membership growth in existing clubs, and the CGD is the lead for building new clubs. The analysis in this section will focus on existing clubs.

Membership payments and clubs have declined since peaking in 2013/14. In 2021/22, D39 had 545 new

member payments and 2,939 renewal payments, for a total of 3,484 payments. With a base of 4,051, payments decreased 14% over the prior year (20/21). D39 began 21/22 year with 127 clubs and ended the year with 115, a loss of 12 clubs (no new clubs formed). Since July 1, one low membership club has come into good standing through the transfer of members from a club in good standing; the base is now 116, effective September 2022. For the 21/22 Year: 21 clubs were distinguished (16P; 1S; 4D), of which 5 had membership less than 20; two clubs with membership greater than 20 did not achieve distinguished status. For the year 22/23

On July 1, 2022, 18 clubs (16%) began the year at or above charter strength (20 members or more). 60 of the 116 Active clubs (52%) are eligible for a club coach (8-12 members).

Wildfires are continuing to disrupt D39 communities, as is COVID. The ongoing transition from on-line meetings to hybrid has the potential to disrupt membership for many clubs. The inability to search for clubs which meet in-person only, on-line only, or hybrid will continue to present challenges to prospective members.

## 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.)\*

Incentivize and recognize membership increases and early actions for clubs. Incentives will be promoted at DECMs, on the website, and via e-mail. This year the District will provide incentives for clubs to:

- 1) add members each month, and to get them engaged in the club by scheduling them for their first speech;
- 2) achieve 5 or more DCP goals by December 31;
- 3) renew the minimum membership before the term ends (September 30 and March 31);
- 4) achieve distinguished status by June 1;
- 5) have 100% of members enrolled in Pathways within 6 months of joining the club.

Items 1 and 3 are focused on gaining and retaining members, respectively.

Incentives will be provided in the form of tangible items and Toastmasters gift certificates.

District 39 is revising the Triple Crown Award this year to include the following:

- A) Complete any three of the 55 levels in the eleven Paths, credited to clubs in District 39; and
- B) Successfully complete any one of the following five activities by June 30, 2024:
  - a. Sponsor a new club in District 39;
  - b. Mentor a new club in District 39;
  - c. Coach a club in District 39 for six months, or have the club achieve distinguished status by June 30, 2023;

- d. Conduct a Speechcraft Program in association with a District 39 club of which you are a member; or
- e. Conduct a Youth Leadership Program in association with a District 39 club of which you are a member.

Each of these 5 activities would, or have the potential to, increase membership.

#### Action 1

Identify relevant promotion (e.g. 5 DCP goals by December 31)

#### Action 2

Coordinate promotion with PRM

#### Action 3

Identify opportunities to engage membership (e.g. forming Open House team to support club Open House)

#### Action 4

#### Action 5

## 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.) \*

PQD & PRM work together to prepare schedule and advertise. Funds have been set aside in the budget for current and new clubs for incentives.

Club Retention Chair to form Open House support team.

## Assignments

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

The PQD will monitor progress.

#### Action 1\*

Monitor Dashboard to identify clubs which increase membership and forward to PQD for recognition.

#### Action 2\*

Monitor Dashboard to identify Area Directors who have completed club visit reports and forward to PQD for recognition.

#### Action 3

Recruit and train club coaches and mentors.

#### Action 4

Monitor Dashboard to identify clubs which complete club officer lists.

Action 5

Develop and monitor strategies for membership building.

## Timetable

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

Actions 1-3 and 5 are continuous. Tactic 4 takes place in November and December, and May and June. The dashboard and various databases will be monitored.

Action 1\*

See above

Action 2\*

Monitor District Central to identify Areas and Divisions which have completed club visit reports.

Action 3

Focus Area Director training to encourage 100% of Club Visits

Action 4

Recognize and celebrate Area Directors who achieve 100% Club Visits

Action 5

## 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.)\*

New Clubs are considered in Goal 2. D39 chartered no new clubs in 21/22, and chartered two clubs in 22/23. The goal for this year is to open 1 new club per area, for a total of 23 New 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 appointing a club extension chair to pursue leads and scheduling demonstration meetings.)\*

In order to build new clubs, there are 2 distinctive paths the CGD will follow up on: 1) Engage identified warm leads and work to build new clubs 2) Travel to underserved areas in the District to identify opportunities for

new clubs through cold calls. CGD will provide initial and ongoing training to support targeted area like lead generation, paperwork, New Club Sponsor and Mentor training. Division and Area Directors have been engaged and trained in methods to identify viable leads. The existing team will need to grow in order to support the District goal.

#### Action 1

The Club Extension Chair leads all committees involved in generating, tracking, and converting leads to new clubs.

#### Action 2

Appoint a Marketing Team chair, preferably with input from the PRM

#### Action 3

Appoint a PR Team Chair, as needed.

#### Action 4

Appoint a Demo Team Chair, as needed

#### Action 5

## 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).)\*

The Club Extension Chair leads the New Clubs Team, which includes: Club Extension Committee and any additions focusing on club building (e.g. New Clubs Team, Demo Team) The Club Growth will collaborate with Club Extension Chair to determine further team members

## Assignments

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

Current Assignments: Donna Lewis, Club Growth Director; Louise Houdelette, Club Extension Chair. Further assignments will be made based on club growth activity.

#### Action 1\*

CGD: Determine the Chairs and Committee Members needed for the CG Team.

#### Action 2\*

CGD: Contact the Division Directors to build relationships.

#### Action 3



Working with the PQD's Training Manager, include Club Quality training of Division Directors, Area Directors, and Club Sponsors.

Action 4  
Club Growth coordinate with Web team for updates for review by Branding Committee and approval by District Director.

Action 5  
CGD support-office hours, training, New Club Sponsor/Mentor, Club Coach Open Houses.

## Timetable

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

- 1) Club Growth Team will contact and coordinate with the Division Directors/Area Directors Club Growth Teams.
- 2) Encourage all committee members to attend appropriate trainings offered by Program Quality team.
- 3) Following new clubs leads and developing new clubs leads will be on going.
- 4) Work with Public Relations Manager and her team update and refresh Web pages, Facebook, Meetup, and all social media frequently.

Action 1\*  
Begin immediately and complete by the September DECM.

Action 2\*  
Begin immediately and work with District Director to determine Division and Area Director's needs.

Action 3  
Begin immediately and monitor new club leads throughout the year. Present at DECMs.

Action 4  
Begin immediately monitoring the effects of our social media program on our club growth. Present at DECMs.

Action 5  
Begin immediately monitoring team workload and add additional team members as needed.

## 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.)\*

Last year (2022/23), District 39 had a base of 118 clubs. Twenty seven (22.8%) achieved distinguished status (or better); There were 9 Divisions which led to a struggle to fill Division Director positions. Data presented in the TI system does not always provide the needed information. District 39 currently has a base of 106 clubs, and it is possible additional clubs may be added back into the base as they come into good standing.

Club officer training focuses on how clubs can achieve success, so officers do have the opportunity to understand how to achieve success.

The Find A Club feature does not allow one to search for clubs which meet in-person, causing frustration to potential future and current members.

## 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.)\*

Prior year strategy utilized "District Bucks" which was not as successful as hoped.

This year the District will provide incentives are still being determined. Suggestions and feedback has been received from the Division Directors.

Division Directors have been requested to submit requests for marketing material and supplies needed.

Area/Division Director training will be completed with a focus on teamwork in club success. Emphasis on visiting 100% of clubs in each round

Focus on club engagement to motivate clubs in achieving goals

District 39 is revised the Triple Crown Awards in 2022-2023 to include the following:

A) Complete any three of the 55 levels in the eleven Paths, credited to clubs in District 39; and

B) Successfully complete any one of the following five activities by June 30, 2023:

a. Sponsor a new club in District 39;

b. Mentor a new club in District 39;

c. Coach a club in District 39 for six months, or have the club achieve distinguished status by June 30, 2023;

d. Conduct a Speechcraft Program in association with a District 39 club of which you are a member; or

e. Conduct a Youth Leadership Program in association with a District 39 club of which you are a member.

The three educational awards bring the clubs closer to achieving distinguished status, while completing one of the five activities moves the member closer to completing their DTM award. Completing the DTM award

would also move the club closer to distinguished status.

A Pathways Mentor team is formed to help members with Pathways questions.

Club officer training will be provided several each month during the training periods. Training in other districts in the pacific time zone will be identified and shared on the District 39 website. Clubs will be encouraged to attend training. An in-person Fall training event is scheduled.

#### Action 1\*

District leadership will work with the Pathways Mentor team to engage members and increase Pathways understanding

#### Action 2\*

Create a page on the district website devoted to the incentives

#### Action 3

Include information about the incentives, as appropriate, in the District 39 weekly newsletter.

#### Action 4

Recognize clubs and members for their accomplishments each month.

#### Action 5

Form team under Club retention chair which will support clubs in Open House efforts

## 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).)\*

The PQD is responsible for encouraging and tracking progress toward the DCP, and working with Division Directors to help clubs succeed. The PRM will help promote incentives and will publicize achievements through D39's newsletter, social media, and the website.

## Assignments

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

DawnMarie Times, Training Manager, is responsible for ensuring training for officers and members are manned.

Laura Gregory, PQD, is responsible for all other activities at the district level, in coordination with Division Directors and Area Directors.

Angie Rodriguez, Chair of Pathways Mentor Team will manage Pathways information sessions and additional

activities as appropriate.

Action 1\*

PQD will work with Angie Rodriguez and team to schedule Pathways sessions - on going

Action 2\*

PQD, with assistance from training manager, will create and conduct the fall and spring training schedule for club officers and District leadership

Action 3

Create, implement and incentivize the DCP for membership, education awards, training, and administration

Action 4

Create, implement and incentivize a recognition program for education awards, members, clubs, areas, and division.

Action 5

## Timetable

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

These items, except for Speech Contests, Leadership Gatherings and Spring Convention, will occur year round.

Action 1\*

The PQD will post winter training events on the calendar by October 15. Training events are publicized well in advance.

Action 2\*

The PQD will work with the webmaster to update the website on an ongoing basis

Action 3

Ongoing - All year

Action 4

Ongoing - All year

Action 5

Ongoing - All year

## Additional Goals

Selection of provider for new District Website and Toastmaster International approval to exceed

Administrative guidelines for annul budget.

## 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 District Website appearance and ease of use is due for an update.

## 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.*)\*

Identify new provider and replace current format with platform that is easy to read, locate information and provides information for prospective and existing members.

### Action 1\*

Trio and IPDD meet to discuss requirements and wants for the new District website.

### Action 2\*

District Director to identify companies and individuals to replace and support new District website.

### Action 3

Trio and IPDD interview prospective companies and individuals

### Action 4

Trio and IPDD select prospective provider

### Action 5

DD submits budget to TI World Headquarters to consider variance on administrative cost overrides needed.

## 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.)\*

Current and previous webmasters-George Jarosik, Wes Johnson, Amrik Chima, David Betowski and Brandon Platt to serve as consultants. Current webmaster, Brandon Platt to provide needed technical support as new

website is built.

## Assignments

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

Lance McMahan, DD, Laura Gregory, PQD, Donna Lewis, CGD, Lynda Mendez, PRM, Denise Alder-Gutherz IPDD, Mirka Johnson, FM, Sue Eisberg, AM, along with current and previous webmasters and end users were asked what they were looking for the new website to look like and current functionality issues to resolve. Two outside companies and one company that employs a District 39 Toastmaster in this industry were interviewed. Considerations for ability to meet the needs of the district and cost were taken into consideration. The preliminary budget was submitted to TI World Headquarters and approval was received to increase the administration budget to cover this cost was met.

Action 1\*

Trio and IPDD-Group discussion

Action 2\*

Action 2-DD with support from current and existing webmasters

Action 3

Trio and IPDD

Action 4

Trio and IPDD

Action 5

DD to submit preliminary budget to TI World Headquarters with input from PQD, CGD, PRM, AM and FM

## Timetable

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

This research for this process was started during the 2022-2023 Toastmaster year. All actions above were completed by August 2023

Action 1\*

Started May 2023, completed

Action 2\*

Action 2-Started in February 2023, completed in July 2023

Action 3

Started in June 2023, completed in July 2023

Action 4

Completed in July 2023

Action 5

Started and completed in August 2023