

District Success Plan

Team Composition

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

Diana Dee, District Director

Lori Shapiro, Program Quality Director

Christine Brady, Club Growth Director

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

Vicky Schroeder, Public Relations Manager

Mike O'Neil, Administration Manager

David Clark, Finance Manager

Lee Lance, Logistics Manager

Seven Division Directors

Thirty-two 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?*

Act with Integrity

Respect all individuals

Serve all clubs, all members and prospective members

Perform all actions with Excellence

Team Operating Principles

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

Communicate thoroughly and often with leaders and members

Give recognition often

Focus on the mission of the district ("Keep the main thing the main thing")

Balance planning as a team with working autonomously

Be creative

Trust each other

We have FUN and we get it DONE.

Potential Obstacles

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

Sickness or family emergencies

Work conflicts

Members challenging the district leadership

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 + PRM team will meet monthly for breakfast and weekly via GoToMeeting.

Task management will be handled using various Trello boards.

SLACK, email, phone, and text will be used for communication and collaboration

DELP meetings are every other month, in person and virtual meeting

DEC meetings are quarterly and in person

Fall District Council (DC) meeting will be virtual (per TI requirement this year)

Spring Conference will include the Spring DC business meeting and elections (in person meeting).

Division Council meetings will be in person and virtual

Team Interactions and Behavioral Norms

How will decisions be made?*

The team will discuss issues using Slack, email, phone, or in person. Decisions will be by consensus; if no consensus, the district director will make the decision.

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

1. We prefer using SLACK to collaborate and communicate within the Trio, District leadership, including committees, and private communication
2. We utilize Trello to detail our District Committee Activities: New Club Leads, Club Mentors, Club Coaches, Youth Leadership, Unpaid Clubs, District Success Plan, LACE/TLI, Learning Lab monthly sessions, and District Supply orders
3. We use phone calls for immediate response, and emails as well
4. We meet weekly, either in person (once per month) or using GoToMeeting
5. District trio leaders and the PRM participate in bi-monthly Region Adviser calls

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.

Monthly Trio+ face to face meetings, and weekly GoTo meetings (Sunday night) ensures the trio members are up-to-date with current issues and activities

Trello and Slack are updated daily for communication, posting photos and team collaboration

Emails are used to communicate with larger audiences (AD, DD, Clubs, Members)
District text messaging (SMS & MMS) is used to communicate upcoming events
District Facebook account is used to promote events, and post photos of the events

How will the team resolve differences of opinion?

We will get on a GoTo meeting/conference call (or meet in person if necessary) to discuss and resolve the issue(s). Differences will be discussed privately by the team. The District Director will make the final decision if differences cannot be resolved.

How will the team support one another?

The team will communicate regularly with each other.

If one person cannot meet his/her responsibilities due to an emergency, others will step in.

How will the team ensure equitable participation when completing activities?

Participation will be reviewed during weekly meetings.

Adjustments will be made as necessary.

How will team members be held accountable for their responsibilities?

Responsibilities will be reviewed during weekly meetings.

Awareness of responsibilities will hold members accountable.

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

Acknowledgement and appreciation for actions and accomplishments will be given often by one member to another.

Recognition will be given in articles appearing in the district social media.

Recognition of accomplishments will be given at DEC meetings.

The Spirit of Excellence Award (one or two) will be given at each DEC meeting.

At the Spring Conference, the Homer trophy will be awarded to a member of outstanding creativity, and the Roy D. Graham trophy will be awarded to the member who has given outstanding service to the district.

At the annual awards meeting (August 2019), the Gregory trophy will be awarded for outstanding mentoring excellence. Also at that meeting, all district leaders and committee chairs will receive a plaque or award for their service. The Division Director of the Year and Area Director of the Year awards will be given. At least one Spirit of Excellence award will be given. The Toastmaster of the Year award will be given.

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.)*

Last year was challenging to say the least. For the first six months, we had almost no new club leads and added just one club. We ended the year with a negative 366 member payments. And we lost a net of 4 clubs, one a high member club that left because they did not want to participate in the Pathways program. Some multi-club members scaled back to being in less clubs.

This year looks very promising. We have one club chartered, and another two very close to chartering within the first quarter. We continue getting a steady stream of club leads and have 11 in the pipeline. We have 25 clubs that have 12 or fewer members. This is a major concern and we have to build up our club coach team, and work on building club membership in all of our clubs to avoid a net club loss.

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.)*

STRETCH GOAL: Become a President's Distinguished District

STRATEGY:

1. NET CLUB GROWTH - 12 CLUBS (assuming a loss of 10 clubs, so build a total of 22 new clubs)

2. NET MEMBERSHIP PAYMENT GROWTH OF 473 PAYMENTS

Assuming all new clubs will have 22 members:

- build 2 clubs in Q1 (3x payment): 132
- build 5 clubs in Q2 (2x payment): 220
- build 7 clubs in Q3 (2x payment): 308
- build 8 clubs in Q4 (1x payment): 176
- less estimated club loss/member attrition: -240 (lose 10 clubs at average membership of 12 and average payments of 2)
- assume continuing clubs average no net membership loss
- Total member payment gain: 596

MEMBERSHIP BUILDING PROMOTIONS: The District promotes the Smedley, Talk up Toastmasters and Beat the Clock membership building drives. We will use Social Media, and have added Opt-out texting to our communication with members and officers. We also have quarterly Open House training events, and one Club Success and one Club Growth Workshop that focus on club membership building skills. We also ask each AD to add at least one club in their area during the year, which encourages them to become a President's distinguished Area. Also, we have been training and engaging Division Directors and ADs to help with building new clubs. We are offering a district-wide Club recognition event (Founder's District All Star Event) and a Club vs Club event to build excitement and recognition of club building activities.

CLUB/MEMBER RETENTION: We need to build a TEAM that focuses on training clubs to retain members. We encourage our stronger clubs to Adopt A Club and help a weaker club learn how to build new members and take a look at how they can make meetings fun and educational.

Action 1

Increase promotion of the Smedley/Talk Up Toastmasters/Beat the Clock awards district wide through Social Media and Division council meetings.

Action 2

Build a New Club team in every division so that they can take a lead and launch a new club

Action 3

Provide training to Div directors and Area Directors on how seek out and qualify new club leads, and how to enter them into our collaboration tool, Trello

Action 4

Provide weekly email blasts/newsletters to Club Leaders and emphasize membership renewals, and membership retention by providing ideas to keep members having FUN.

Action 5

Widely publicize the Club Growth incentives on foundersdistrict.org/incentives website.

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.) *

TRAINING: We have monthly learning labs with 9 different sessions for club members, club officers, Division and Area director team members on a variety of topics. The Club growth team must build up it's core team to support and train new club mentors, as well as Club Coaches. Every Division must have a New Club chair that knows how to work leads and launch new clubs, including completing the required forms.

BUDGET: The district has created a marketing budget, with funds allocated to Club Growth incentives and Club Growth training.

EVENT VENUES - National University can be used for events, at a very low cost. Norm Stein is the contact. Mesa Verde United Methodist Church is also available for evening and weekend events, also at a low cost.

Assignments

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

CHARTERING NEW CLUBS: Christine Brady, CGD, Lori Shapiro PQD, Diana Dee DD, Norm/Frannie Stein, John Barry, All 7 Division Directors and 32 Area Directors. Christine will lead the way, follow up

with Insightly leads post new leads that come in from Divisions/Area Directors to Trello. Make initial contact and work to setup our Charter meetings (lunch and learn, Demo meeting and Launch meetings). Others to assist with meetings and documents to send to WHQ.

TRAINING: Christine Brady, CGD, to organize the Club Success and Club Growth Workshops, and present club retention and club quality sessions to club leaders and members.

LEARNING LAB: Lori Shapiro, PQD. Available 2nd Sunday of the month, 1-4pm. 9 possible sessions to offer training for clubs - Open House, Member Retention, Club Quality topics

INCENTIVES: Both PQD and CGD offer membership and club building incentives. Recognition Chair Cliff Shimizu will track progress and present awards earned to club members

CLUB RETENTION: Kathy Hughes will train and assign Club Coaches for struggling clubs, and provide training at monthly learning labs. She will match clubs with coaches. CGD will assign through WHQ.

Action 1*

INSIGHTLY: Monitor Insightly leads, and enter into Trello - assign team members, and setup New Club launch meetings

Action 2*

CLUB GROWTH Workshops: 9/15 - First CG Workshop - Christine to lead. Spring workshop will also be planned.

Action 3

CHARTER NEW CLUBS: CGD leads a team, currently 1 club chartered, with 10 more in progress. Tracked on the Trello tool.

Action 4

LEARNING LABS: Location confirmed for all LL this year. Focus on Pathways Education, Coaching , Mentoring and Club Quality

Action 5

TRAINING: In progress throughout the year- Initial Div/Area Director training complete, Winter training schedule set, Club Officer training goal of 80%

Timetable

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

Founder's District Calendar is used to track all FD training events. Utilizes a google calendar that is shared and updated by District leaders . It is available to all district club members through Foundersdistrict.org/calendar

Progress tracked on foundersdistrict.org website, as well as our my.foundersdistrict.org website (available to all district club members.

Action 1*

EVENT CALENDARING: Competed for District, Division and Area events, with incentive dates listed as well. Learning lab schedule is posted a week to 2 weeks ahead.

Action 2*

COMMUNICATION: Event announcements and invites are sent out a few weeks ahead using Eventbrite, and Mail Chimp. Email blasts, FB posts and group texts are sent out as well

Action 3

PROGRESS TRACKING: The District Dashboards (on the TI site) are viewed monthly to monitor member payments, new club launches, clubs that need special attention.

Action 4

LOW MEMBER CLUBS: Division and Area Directors to contact low member clubs quarterly (or more frequently) to offer coaches, support, and training

Action 5

RECOGNITION: We are tracking membership growth, Smedley/Talk Up TM/Beat the Clock, award incentives at DEC and Business meetings.

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.)*

Last year the district had a net loss of 2 clubs.

We started this year with 77 clubs having 20 or more members, 37 clubs having 13 to 19 members, and 24 paid clubs having 8 to 12 members.

Our goal for this year is to add 20 clubs and lose no more than 8 clubs, for a net gain of 12 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.)*

To help struggling clubs, we will assign club coaches or use our Adopt-A-Club program to pair a strong, healthy club with a low member club.

To grow clubs, we will seek commitments from members to start 1 or more clubs, finding enough committed members to have the new club commitments add to more than 20.

Chartering a new club involves a 3-step process: 1. Lunch and learn meeting; 2. Demonstration meeting (all major meeting roles filled by a demonstration team); and 3. Launch meeting (team

provides speaker evaluators; new club members fill other roles, with coaching from launch team; charter paperwork collected and completed).

Action 1

Enough members will commit to starting or providing qualified leads for 1 or more clubs, so that commitments will total more than 20.

Action 2

A demonstration and launch team will be assigned to each prospective club.

Action 3

Club leads will be sought from Division and Area Directors. Also, sources like the Orange County Business Journal.

Action 4

Club coaches will be sought and assigned. Clubs will be sought for the Adopt-A-Club program.

Action 5

Club sponsors and mentors will be sought and assigned, to ensure the new clubs thrive.

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.)*

The District has a church that is open to us hosting events at. A Learning Lab that was instituted last program year is continuing this year. We are utilizing this once a month event to train club coaches and mentors and to also host round table discussion times for coaches and mentors to get the support they need to be successful. The District is hosting a club success workshop in September and a club growth workshop in February to better help our current clubs succeed and to train anyone on how to take a club lead and turn it into a viable club charter. The District has a variety of promotional materials to create information folders for corporate meetings and also for potential club lunch and learn events.

Assignments

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

The club coach and club mentor chairs each help with the monthly learning lab events as well as vetting of new club coaches and mentors. There is a questionnaire for club coaches and mentors so the team can find the right match. For the coaches, there is also a questionnaire for the club to fill out.

Action 1*

Vet, train, and support club coaches and mentors at once a month learning lab events.

Action 2*

Create new member kits with applications and promotional material to hand out to potential new club members.

Action 3

Create promotional material folders for corporate meetings with promotional material.

Action 4

Host a club success workshop to help our existing clubs go from good to great.

Action 5

Host a club success and club growth workshop to help our Division and Area Directors learn to take a club lead to a chartered club.

Timetable

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

The club coach and club mentor training and learning lab events are a carry-over from last program year. The previous chairs kept the project management tool in Trello up to date. The current club coach and club mentor chairs are continuing this process. the promotional kits are also a carryover from the previous program year. These are continuously created to keep the supply well stocked.

Action 1*

Started last program year and continues at learning lab, hosted on the 2nd Sunday of the month.

Action 2*

Continuous. Goal is to have a continuous supply to be able to attend corporate meetings and lunch and learn meetings at a moment's notice.

Action 3

Continuous. Goal is to have a continuous supply to be able to attend corporate meetings and lunch and learn meetings at a moment's notice.

Action 4

Fall Club Success Workshop scheduled for September 15, 2018.

Action 5

Winter/Spring Club Growth Workshop scheduled for February 2, 2018

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.)*

Typically, more than 50% of clubs in the district reach Distinguished or better status. Last year, however, only 46% of clubs were Distinguished or better, because many clubs did not meet the membership requirement.

In our district leader training and our club officer training, we ensure the Division and Area Directors, and club officers, understand the Distinguished Club Plan goals and the qualifying membership requirement.

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 its excellent education program, with even more emphasis on club quality. We will have a special event December 1 that will have a "best club" competition. This fun event will emphasize club quality and attracting new members.

Action 1*

In our Division and Area Director training, we have emphasized understanding of the DCP and had a special session on how to promote it to clubs as a measure of how the clubs are meeting member needs.

Action 2*

We have a major incentive for clubs that achieve at least five DCP goals, with at least one of the achieved goals a Pathways goal, by December 31, 2018.

Action 3

Distinguished Club Plan forms, with space for participating officer signatures, have been distributed to all clubs. Descriptions of club and member incentives are available on the Founder's District web site.

Action 4

Area Directors will be asked to submit first term club visit reports by mid-October. The District Director and/or Program Quality Director will read the reports and muster resources to help clubs that need it.

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

Our Club and Member Achievement committee is co-chaired by last year's Club and Member Achievement chair and a former Division Director. We have \$3000 budgeted for education incentives and more for membership incentives (see Goal 1).

Assignments

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

Actions 1 and 2: PQD Lori Shapiro

Action 3: Club and Member Achievement committee, Cliff Shimizu and Vijay Chidambaram, co-chairs.

Action 4: The Area Directors, and District Director Diana Dee and PQD Lori Shapiro.

Action 1*

All Division and Area Directors have been trained.

Action 2*

PQD Lori Shapiro and the Club and Member Achievement Committee will monitor club DCP goal achievement

Action 3

The Club and Member Achievement Committee ensure that a ribbon is given to each club that submits its DCP to the Committee by September 30.

Action 4

Club visit reports will be monitored. Reports will be read as they are turned in. Needed responses will be coordinated with the Divisions.

Action 5

Timetable

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

See below.

Action 1*

Begun June 23, 2018. Completed by mid-August.

Action 2*

Begun July 1, 2018. Will be completed December 31, 2018.

Action 3

Begun July 1, 2018. Will be completed September 30, 2018.

Action 4

Begun July 1, 2018. Will be completed by the end of October, 2018.

Action 5

Additional Goals

Founder's District is working to improve the learning opportunities in the monthly learning lab by finding additional locations and additional dates during the week to better serve our corporate clubs. The monthly learning lab continues to provide focused Pathways training to help members navigate the assessment as well as training to the base camp managers. We also offer new member orientation at learning lab. This is a session designed to answer all of the burning questions our new members have. Founder's District has also increased the incentives offered to our members to include more achievable goals related to Pathways. Founder's District is working to have more members enrolled in Pathways by offering specific incentives related to the percentage of active members enrolled per club.

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.)*

STRUGGLING CLUBS: We have 22 clubs that need coaches. We are continuing a club coach mentoring program to help our club coaches maximize their success. We are challenged in that we don't have enough qualified coaches to meet the needs of the 22 clubs needing coaches. We have found that not all clubs that need coaches want the help.

PATHWAYS: The district rolled out Pathways on December 5, 2017. There has been resistance to change. In order to facilitate Pathways adoption, and to assist all new clubs and club members learn Pathways, we have setup a District-wide team.

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.*)*

The monthly learning lab has increased the visibility of the club coach program as well as the new club mentor program. The learning lab attendance is not as robust as it could be. The District has implemented a District-wide texting program, to increase attendance at all District events. As more

texts are sent for our events, we will be able to analyze the success of using texting to reach our members.

PATHWAYS ADOPTION: The district has TWO Pathways Education Co-Chairs, and each Division has a Pathways Education Chair. Clubs are being encouraged to create a Club Pathways Mentor who will help train new members on the use of the Pathways system. The District and Division Pathways Education Chairs are tasked with becoming the District Pathways leaders. They are being asked to present at our LACE/TLI sessions, at Division Council Meetings and club meetings.

Action 1*

Find additional locations and days for the learning lab to best reach members in both the north and south side of our district.

Action 2*

Continue to interview and qualify club coaches and mentors. Assign these members as soon as opportunities become available.

Action 3

Continue to train Division Pathways Education Chairs to be able to train Area Directors and Club Pathways Mentors

Action 4

Provide incentives for Pathways adoption - both PQD and CGD have setup a variety of incentives available through the foundersdistrict.org/incentive website

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 past district directors, area and division director, the district website, and a nomination committee.)*

District funds have been budgeted for incentive programs, club coach training, and recognition for achievements. Our Division and Area Directors are a great resource to identify midweek learning lab locations. They are also a great resource to find additional coaches and mentors. Our goal is to help as many members as possible to not only have successful clubs but to also reach their own goals for the DTM award before June 30, 2020.

Assignments

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

PATHWAYS: Lori Shapiro is actively working on improving the monthly learning lab sessions as well increasing attendance. Lori also implemented the Division Pathways Education chairs and they were all trained at the July learning lab. There are monthly Pathways training sessions, and Pathways roundtable events at the learning labs. At LACE/TLI we will hold an hour session for Pathways training for club officers and members.

CLUB COACHES AND CLUB MENTORS: Christine Brady has David Moore to assist with Club Mentors and Kathy Hughes to assist with Club Coaches

Action 1*

Encourage Division and Area Directors to provide learning lab opportunities within their immediate geographic area.

Action 2*

Engage District and Division Pathways Education Chairs at Division Council meetings, and offer up training and mentoring to club members

Action 3

Award Incentives either on the spot, or at quarterly DEC, LACE/TLI and business meetings

Action 4

Pathways Communication: Create a Founder's District BLOG to provide Pathways education and to recognize Incentive earners

Action 5

Timetable

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

Work began before the start of the program year, with each office officially transitioning duties to the next officer. the transition was seamless and work that began in the last program has continued. A strong start is critical to the success of the District. Progress is tracked using the District Trello Project Management tool.

Action 1*

Division and Area Directors to report at DEC/DELP meetings potential learning lab dates and locations within their geographic area.

Action 2*

Continue to offer monthly sessions at learning lab to all members for Pathways enrollment, base camp manager training, and one on one tutoring.

Action 3

Use Trello to track all incentives. Award as earned.

Action 4

FD Blog to be established and initiated by October 31, 2018

Action 5