**District Success Plan**

**Team Composition**

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

District Director – Emilie Taylor, DTM

Program Quality Director – Cate Arnold, DTM

Club Growth Director – Eldred Brown, DTM

Public Relations Manager – Kathleen Tully, DTM

Administration Manager – Paul Fanning, DTM

Finance Manager – Karen Semprivevo, DTM

Division Directors

Area Directors

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

Extension Chair – Rodger Cook, ACG, ALB

Conference Chair – Juan Coronel

Education and Training Coordinator – Phyllis Harmon, DTM

Club Coach Coordinator – Jim Robinson, DTM

New Club Sponsor Coordinator – Cleon Cox, DTM

New Club Mentor Coordinator – Leanna Linquist, DTM

Club Fitness Coordinator – Jim Dent, DTM

**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?\*

\*Members are the heart of District 7. Member experience matters.

\*We adhere to and support Toastmasters International’s core values of Integrity, Respect for the Individual, Service to the member, and Excellence.

**Team Operating Principles**

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

1. We practice collaborative partnership.
2. We focus on solutions rather than problems.
3. We work on clear communication. Speaking with openness and honesty however tough it can be is very important. Using positive and encouraging words in or communication and dialog is vital and we support this approach.
4. We have the freedom to experiment with ideas as long as it supports the Toastmasters Mission.
5. We provide a safe place to learn to be a leader and quality communicator, while holding team members accountable for actions and behaviors that may appear to be less than our core values.

**Potential Obstacles**

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

\*We have personal and work commitments. Our CGD works full time and may not make all kickoff/demo meetings and needs protocols in place. We work to having back up plans that making commitments are met in a seamless way.

\*We have weekly trio calls, DEC calls, Region 1 RA calls, committee calls, and other external calls. Communication is what Toastmasters is all about. Staying in communication vs second hand information is vital and supported by our calls.

\*We have different communication styles which pose challenges. The fact that we understand this enables us to learn which styles work best for each person. We are working on learning the styles that each has and understanding our differing styles. This is important for the trio as well as for communicating with members.

\*We have busy lives. We have responsibilities outside of Toastmasters. We will ensure to address issues as they come up.

**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.)\*

\*We have weekly trio calls. Mondays from 7-8 pm via zoom – online platform. Agenda usually covers status updates towards accomplishing District Goals.

\*District Director will make monthly calls to Division Directors.

\*Monthly DEC Meetings.

\*Bi-monthly Division Directors calls.

##  **Team Interactions and Behavioral Norms**

How will decisions be made?

We will make decisions following the Toastmasters values, policies and protocols, and with the Toastmasters 4 core values of Respect, Integrity, Service and Excellence in mind.

When making decisions that impact everyone, District trio will do their best to come up with team decisions using collaboration and consensus-building techniques. When there are conflicting positions, however, the District Director will have the final say.

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

1st Preference: Trio weekly meetings via zoom – online platform

2nd Preference: emails when there are emerging issues

3rd Preference: texts, when response/decisions are needed.

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.\*

We have busy lives with personal, work and other commitments.

1. Trio weekly zoom meetings work well.
2. We will strive for once-a-month face to face meeting.
3. Group text messages when quick responses are needed.
4. Emails provide back up for any and all communication when needed.

How will the team resolve differences of opinion?

\*We come to our role with a unique set of experiences. As we view the world from our own lens, we will strive to find common ground. We will focus on solutions rather than problems. We will focus on issues and not personalities. We will choose options/solutions that best serve all our members. We will look for solutions that are fiscally responsible and will benefit the District Mission and District Goals.

\*Whenever issues are beyond district's capabilities, we will ask the Region Advisor to come and help out.

How will the team support one another?

\*As District Director, Program Quality Director, and Club Growth Director, we each have our own set of responsibilities and priorities. We are expected to do our roles to the best of our abilities. This is not only for the trio, this also includes our division directors, area directors, and extended team members.

\*When there is request for help, we are here to support and encourage.

\*We will collaborate on projects.

\*We will ensure that we have open lines of communication.

How will the team ensure equitable participation when completing activities?

\*As trio members, we are expected to pull our own weight and do the best we can with our specific responsibilities and priorities. The same is true for all our District Leaders. When we see a team member struggling, we will offer support.

\*If there are occasions when a District Leader is found to be not doing their role, the District Director will provide additional direction. Region Advisor will be asked to help, if no progress has been made.

How will team members be held accountable for their responsibilities?

\*Team members have priorities and are accountable to accomplish these priorities.

\*Periodic checks though weekly trio meetings and DEC meetings are a way of monitoring progress.

\*Progress towards achievements in goals will be monitored in real time.

\*Quarterly review of the District Success Plan is implemented to make sure we are moving in the right direction.

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

\*We will have periodic recognition through our conference, TLIs and district events.

\*We will recognize through Voices, District Online Magazine, and other platforms such as Social Media.

\*We will have a Celebration of Leadership to recognize individual contributions.

**Goal 1: Membership Payments Growth**

Membership payments base



Distinguished (Membership payments base x 1.015)



Select Distinguished (Membership payments base x 1.03)



President’s Distinguished (Membership payments base x 1.05)



Smedley Distinguished (Membership payments base x 1.08)



**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.)

\*Membership has been in decline the past few years, partly due to the continued rollout of Pathways, and partly due to other factors. We lost 20+ clubs last year due to declining membership. District 7 faces a special challenge with its geographical expanse: most of Oregon. Divisions A, B, & C include a lot of small towns with only one Toastmasters club and at great distance from each other, limiting opportunities for clubs to be assigned coaches. Millennials are underrepresented.

**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.)

\*Build a strong team of trained sponsors, mentors, and coaches. (Looking for such people on a purely "as-needed" basis has not worked.) Expand our service to Millennials. Jim Dent has offered to revive our Club Fitness Program for clubs with 13-19 members. We have rolled out an incentive to inspire clubs to run open houses before Labor Day (September 2). CGD will run renewal incentives during membership renewal periods and membership growth incentives during the Smedley Award, Talk Up Toastmasters, and Beat the Clock program periods, together with other incentives.

Action 1

Appoint coordinators for the Club Sponsor, Club Mentor, and Club Coach teams.

Action 2

Establish training programs to ensure sponsors, mentors, and coaches are ready to succeed.

Action 3

Jim Dent to build our new Club Fitness Program.

Action 4

Work with Area and Division directors to increase membership with the goal of zero club loss.

Action 5

Run membership renewal 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

Past Division C Director, Jenny Thomas, is including in her HPL project a study of how we can successfully market Toastmasters to the younger generation. Jim Dent, DTM, has offered to rebuild our Club Fitness Program for clubs with 13-19 members. Jim Robison, DTM, has accepted to serve as our Club Coach Coordinator. District funds are allocated for incentives to build and retain our membership.

**Assignments**

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

CGD will appoint coordinators for our teams of club sponsors, club mentors, club coaches, and club advisors.

Action 1

CGD will appoint club sponsor, mentor, coach, and advisor coordinators.

Action 2

Team coordinators will coordinate training for their teams together with CGD

Action 3

Jim Dent will coordinate our Club Fitness Program.

Action 4

Area and Division Directors will work closely with clubs to build and retain membership.

Action 5

CGD will run incentives.

**Timetable**

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

CGD has already appointed coordinators for our teams of club sponsors (Cleon Cox, DTM), club mentors (Leanna Lindquist, DTM), club coaches (Jim Robison, DTM), and club advisors (Jim Dent, DTM). CGD will meet monthly with D7 Marketing Team (every 4th Monday). CGD will track progress via weekly check of TI's Distinguished Club Performance dashboard and via semi-annual check of the October and April Dues Renewal Status dashboards.

Action 1

July 2019

Action 2

Ongoing through the year

Action 3

Ongoing through the year

Action 4

Ongoing through the year

Action 5

Ongoing through the year

**Goal 2: Club Growth**

Club Base



Distinguished (Club Base x 1.015)



Select Distinguished (Club Base x 1.03)



President’s Distinguished (Club Base x 1.05)



Smedley Distinguished (Club Base x 1.08)



**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.)

District 7 faces a special challenge with its geographical expanse: most of the state of Oregon. Division I (High Desert) was disbanded for not having enough clubs--the few clubs remaining in the division were reassigned to other divisions. Oregon's fastest growing city, Bend, could support maybe double the number of clubs currently located there. Division A (Southern) has a small number of clubs, as well. The Portland business community is underserved, as is Multnomah County east of I-205. Many of our directors and advanced Toastmasters want to sponsor or mentor a new club to earn their DTM awards before the sunset of the traditional program on June 30, 2020.

**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.)

CGD will work with our Club Extension Chair to qualify club leads and assemble a team to run a kickoff meeting for each lead as quickly as possible. CGD will introduce a new club lead incentive, effective July 1, 2019, that will award a free Toastmasters Oxford shirt (value of $44) to any person who submits a new club lead that turns into a kickoff meeting. Additionally, we will buy a banner for every club we charter this year. CGD will work with Division A, B and C directors to build clubs in central and southern Oregon. CGD will harness the energy of our division and area directors and of our advanced Toastmasters as they make one last push to earn their DTM awards before the end of the traditional program.

Action 1

Club Extension Chair will qualify new club leads and schedule kickoff meetings.

Action 2

New club lead incentive. We will buy a banner for every new club we charter this year.

Action 3

Work with division and area directors to build clubs in underserved areas of Oregon.

Action 4

Work with club sponsor and mentor coordinators to build new clubs.

**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.)

We have Club Extension Chair, Club Sponsor Coordinator, and Club Mentor Coordinator to work with CGD to coordinate new club building efforts. Division and Area directors are available to work with CGD in their divisions and areas. We have ample funds to support all club growth efforts. Many members of clubs in District 7 have requested to be considered for assignment as club sponsors and/or club mentors.

**Assignments**

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

Club Extension Chair will qualify new club leads and work with CGD to schedule new club kickoff/demo meetings. Phyllis Harmon, editor of Voices! D7 Online Magazine, has already published an advertisement of the new club incentive. Club Sponsor and Mentor coordinators will help CGD assign sponsors and mentors to new clubs.

Action 1

Club Extension Chair: Rodger Cook

Action 2

Phyllis Harmon, editor of Voices! D7 Online Magazine

Action 3

Division and Area Directors

Action 4

Club Sponsor and Mentor Coordinators (Cleon Cox and Leanna Lindquist)

**Timetable**

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

One to two new club kickoff meetings per month

New club lead incentive already started and will run through end of year

Action 1

Ongoing through the year

Action 2

All year

Action 3

Ongoing through the year

Action 4

Ongoing through the year

Goal 3: Distinguished Clubs

Distinguished Clubs



Distinguished (Distinguished clubs x 0.4)



Select Distinguished (Distinguished clubs x 0.45)



President’s Distinguished (Distinguished clubs x 0.5)



Smedley Distinguished (Distinguished clubs x 0.55)

88

**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.)

\*Data for the last 5 years show the following Distinguished Club percentages for District 7: 33% for 2018-19, 31% for 2017-18; 38% for 2016-17; 44% for 2015-16; and 42% for 2014-15. While up 2% last year, our numbers continue to be lower than the 40% requirement for Distinguished Districts. Several factors contributed to this outcome: 1) While we had 57 Distinguished Clubs, another 41 clubs achieved educational awards/goals, but did not meet their membership requirements. 2) Club officers missed attending TLI and follow-up make training. 3) Based on last year’s Area Director Club Visit Reports, many clubs do not have Club Success Plan. 4) Many clubs are not using mentoring to support member achievement and personal growth. 5) While Education Awards have been consistently going up since 2013, and Pathways Educational Program awards greatly increased last year (834 Pathways and 396 Legacy Awards), we need to focus this year’s efforts on encouraging more Pathways adoption and Legacy credits to be completed and awarded.

**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.)

The goal for this year is to reach Smedley Distinguished of 88 clubs (55%), achieving Distinguished status by the end of the Toastmasters year. To achieve this benchmark and provide a meaningful club experience to club members, Club Officers and Area and Division Directors need to be trained to focus on the value of working to become Distinguished Clubs, Areas, and Divisions. We also need to encourage the use of Division and Area Councils. Also introduce Mastermind groups to create stronger, more experienced Directors and potential future Directors. We need to develop competent leaders to fill in holes in our Leadership Pipeline. This will allow experienced leaders to share lessons, provide guidance and best practices at every level. Club officers need to be trained to embrace the Distinguished Club Program (DCP), conducting of Moments of Truth workshops, and the adoption of Pathways for both new and seasoned members. Most importantly, all leaders should be encouraged to look at their leadership roles as opportunities to develop personal leadership skills, by practicing: (1) understanding their objectives, starting with striving to be Distinguished (2) planning how to achieve their objectives (3)having ongoing Mastermind opportunities to increase their skills, and (4) at the end of their service, getting feedback of what went well, what didn’t, and what they would do differently next time (5) sharing what they know and learned with their successors.

Action 1

All Area and Division Directors will be trained to ensure success in their respective roles. DEC meetings will include training sessions appropriately timed with deadlines and activities. Promote and conduct officer training, through TLIs, makeup training and additional district-wide training opportunities. Hold monthly Zoom interactive trainings on topics that will help officers/attendees learn tips for strengthening their clubs. Emphasis on conducting Moments of Truth workshops and the promotion of Club Success Plan.

Action 2

Focus on Where Leaders Are Made: Opportunities for members at all leadership levels to learn successful leadership and healthy club practices. Have this as the focus at Fall and Summer Toastmasters Leadership Institutes (TLI). Share successful Director Tips or best practices at monthly DEC meetings. Use D7’s 80th anniversary to focus on Members Are the Heart of Our District during the year and for our Spring Conference, the theme of 80 Years of Inspiration – Lead the Way!

Action 3

Have incentives for clubs who have a DCP goals entered in their November Area Visit reports; incentives for clubs who haven’t been distinguished in the last 3 years and make Distinguished this Toastmasters year. Additionally, recognition at the Summer TLI for all clubs that were Distinguished, and recognition for those who have been Distinguished for years in a row with a drawing for a few prizes for them.

Action 4

Encourage the formation of Mastermind groups focused on learning varying levels of communication and leadership skill development. Encourage Area Directors to form Mastermind groups that includes discussions of what’s working and what’s not in supporting their clubs Encourage members to form Pathways Mastermind Camps with the objective of helping each other completing Level 1 and Level 2 projects and getting going in the Pathways Mentor Program.

Action 5

Build our leadership pipeline by supporting and encouraging leadership/mentoring networking events like those that are being held in Divisions C and G. This is a way to provide enrichment and camaraderie to our members and potential new leaders.

**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 allocated resources for TLI and training venues. The PQD and her extended team including the Education and Training Coordinator and Conference Chair.

**Assignments**

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

As a district, we will continue to encourage and empower Division Directors and Area Directors (or designee) to conduct makeup trainings. The goal is to reach as many club officers as possible. PQD and our Education and Training Coordinator will coordinate additional monthly training for the district via Zoom and in person training.

Action 1

District Director will continue to assist in the training of Division and Area Directors. PQD, along with Division and Area Directors (and designees) ensure the successful training of club officers. Education and Training Coordinator.

Action 2

PQD and her extended team: Education and Training Coordinator; Conference Chair; Session presenters.

Action 3

PQD and her extended team.

Action 4

PQD and her extended team.

Action 5

PQD and her extended team.

**Timetable**

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

Action 1

Now through the year

Action 2

November and June TLI. Conference in April, 2020. Zoom calls start 1st Sunday of each month, starting in October.

Action 3

Announce at September 8 DECM. Talk about through Novembers 30.

Action 4

Start groups in October. Run through the year.

Action 5

Share information starting in September through May.

Additional Goals

* 80th Celebration
* To be a Distinguished District

**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.)

* District 7 will celebrate 80 years on June 2020. This is a big celebration for our district. The last time we had celebrated the District was in 2014 for its 75th anniversary. This will be an opportunity for all our clubs/members to take part in the celebration.
* Our goal this year is to become a Distinguished District. It has been 5 long years since D7 was honored with this distinction.

**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.)*

**80th Celebration**

Action 1

80th Celebration: Video promotion of MYWHY that will be featured in the November TLI. Club Contest on MYWHY that will commence January 2020 and will be awarded at the Spring Conference.

Action 2

Creation of an 80th D7 Pin. Communications and Public Relations Campaign to bring awareness of the celebration and promote Toastmasters and D7 membership.

**Distinguished District (stretch goal)**

Action 3

Distinguished District: Build New Clubs; Increase Membership Payments; Distinguished Clubs. Achieve the metrics set by Toastmasters International for this Toastmasters year.

**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.)

The district has allocated money in the budget for the promotion and celebration of our 80th anniversary. One of our past District Governors is working on an HPL and heading a celebration committee.

We are confident that our District will be Distinguished this year. We will work the goals set in this Success Plan to achieve this distinction.

**Assignments**

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

**80th Celebration**

Action 1

Phyllis Harmon’s HPL is coordinating the celebration. PRM for promotion.

Action 2

8oth Pin Committee with Paul Fanning, Phyllis Harmon, Kathleen Tully and DD.

**Distinguished District**

Action 3

District Director, PQD, CGD, Division and Area Directors, Extended team, club officers and members.

**Timetable**

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

**80th Celebration**

Action 1

From now until June 2020

Action 2

Committee is working on the pin. Will be forwarded to Toastmasters’ branding for approval.

**Distinguished District**

Action 3

From now until June 30, 2020