

District Central Conduct District Business

## Completed on 9/10/2017

Team Charter Membership Payments Growth Club Growth Distinguished Clubs Additional Goals Summary At a Glance

### District Success Plan

#### Team Composition

Name the members of the district's core team.

District Director, Ellen Pieklo  
Program Quality Director, Lillian Knight Faison  
Club Growth Director, Keith Maderer

Name the members of the district's extended team.

Administrative Manager - Colette Croop  
Finance Manager - Julie Ricchiazzi  
Public Relations Manager - Christine Wolbert  
Web Manager - Roger Morehouse  
Logistics Manager - Michael Reinbolt  
Division Directors:  
A Gordon, Glenn  
B Otto, Samuel  
C Mulgrew, Ray  
D Chaffee, Amanda  
E, Edwards, Jonathan

Division A - Area Directors:  
11 Moronski-Chapman, Karen  
12 Gorman, Pam  
13 Willavize, Susan  
14 Blake, Kenneth  
15 Engl, Ashley

Division B - Area Directors  
21 O'Brien, Amber  
22 Turner, Alex  
23 Predmore, John  
24 Irizarry, Diana

Division C - Area Directors

31 Wilson, Gina  
32 Brenda Billups  
33 Pieklo, Thomas  
34 Murphy, Gwen

Division D - Area Directors

41 O'Connor, Leo  
42 Morehouse, Roger  
43 Degristina, Sharon  
44 Okafor, Obiefuna

Division E - Area Directors

51 Sturtevant, Catherine  
52 Mowers, Mara  
53 Tucker, James  
54 Mioni, Anthony  
55 Moran, Julie  
56 Seccurra, Jo Anne

### 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 to uphold the Toastmasters promise and guide our clubs/members to follow the program to the best of their abilities  
Respect for each other, our members and all individuals who can benefit from the Toastmasters program  
Service leadership so we never forget the focus is on our members, not the leaders  
Excellence in everything we do and hope by showing this quality, others will strive for excellence as well  
Humor to ensure we don't take our role too seriously and forget that member's join because its FUN!

### Team Operating Principles

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

Core team: weekly conference calls and meeting in person at least bi-monthly.

There will be information sharing among the District Trio of all ongoing efforts to ensure better sharing and succession planning.

DEC will meet at least four times in person, including initial training, additional 2 to 3 meetings will be done virtually via web-based software to save travel costs.

Committees and other teams will meet as needed.

Much communication will be done via email and occasional phone calls.

### **Potential Obstacles**

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

- In rural areas, visiting clubs is a geographical challenge
- Time required often interferes with family quality of life issues
- Lack support systems to reach out to assistants to help with AD roles, e.g. to help with a club visit
- Procedures continue to be undocumented and not easily followed; need to update procedures manual and have approved/endorsed by TI.

### **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 Trio will host weekly conference calls and meeting in person at least monthly.

DEC will meet at least four times in person, including initial training, additional 2 to 3 meetings will be done virtually via web-based software to save travel costs.

Committees and other teams will meet as needed.

### **Team Interactions and Behavioral Norms**

How will decisions be made?

The District Trio will keep each other apprised of ongoing efforts so that all trio members are at least aware of activities taking place in the District. Regarding decisions, the trio will try to discuss and form consensus for most decisions; however, decisions made by team members without prior discussion are to be supported unless there are extenuating circumstances.

The District Director will attempt to minimize the use of final authority to make decisions, but we recognize there may be times when that is required.

The goal is for each team member to be free to make final decisions on things within their area of responsibility.

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

Email will be the primary form of communication to enable documentation of ongoing actions. For immediate need to discuss items, phone calls/text messages will be used.

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.

There is an expectation to meet at least weekly, Tuesday mornings at 9AM, limited to a 1 hour meeting. Sidebar discussions/emails will continue to keep all in the loop. The trio will assess the effectiveness and revise, as necessary regarding meeting time frames.

The District Director will have a bi-weekly meeting to enable the full DEC team to bring up issues, discuss ongoing efforts, etc. This will be an optional call, Known as Leadership Collaboration Call.

How will the team resolve differences of opinion?

Differences of opinion will be consensus based. As necessary, where consensus cannot be made, a third party will be invited to the discussion to help determine where differences may be resulting from communication issues, lack of resources, etc.

How will the team support one another?

The team will accept personal differences. When in discussions with others, the team will always be in agreement when in public and take discussions into private space to discuss differences. This will allow us to always appear to be on the same page. We will recognize the practice of praising publicly and having "discussions" privately.

How will the team ensure equitable participation when completing activities?

As necessary, the DEC members will reach out to others to ensure more collaboration.

How will team members be held accountable for their responsibilities?

The Trio will periodically assess where we are with Club Contests, Area Visits, dues, etc. The respective Trio member will follow up with the Division Directors to ensure members are reached for coordination and action of responsibilities.

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

The District will have an Area/Division Director of the month, recognizing those areas and divisions who are conducting visits, working with clubs, etc.

### 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.)

The District fell short by 425 members to earn the Distinguished District Member Payment Goal of

4, 114 payments. We ended the year with approximately 1670 members, showing a 50% retention rate.

While the rates are low, there approximately 9 clubs in various stages of the charter process, including 5 in Buffalo, 1 in Keuka College, 1 north of Oneonta, and 1 in Hornell, NY and 1 in Syracuse

### 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.)

The open house has been repeatedly the best venue to bring in more members. We plan to offer incentives to encourage open houses. We also offer Fun Meeting, Table Topics and Open House ideas each month in our Newsletter to help clubs find better and more effective ways to engage prospects.

Action 1

We will award \$50 to any club hosting an open house, with all incentives ending on May 31, 2018, for any expenses with receipts attached.

Action 2

For every club that brings in 4 new members, the District will pay the club \$25, with all incentives ending on May 31, 2018.

### 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.)

Our Division and Area Directors have been empowered to help clubs, their officers and members with ideas for membership building. The district will share materials and experiences during our DEC meetings that they can then pass along to their club officers and members. Most of these marketing materials are available as PDF's or free from TI, so the cost should be very reasonable.

### 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 are both incentives:  
Incentive will be updated in the District Success Plan for all members.  
All Post on the web site - Roger Morehouse  
Communicate the plan - Keith Maderer

Action 1

By October 1, the Trio will identify a chair for the Helping Hands to help create strategies in divisions to help struggling clubs, modeled after the Division A program. The team will include Toastmasters from each Division, to participate.

Action 2 The incentives will be identified and created in the newsletter and web site, upon approval of the DSP on September 9, 2017. At least once a month, the Trio will review incentives and update these to include new incentives, if necessary.

**Timetable**

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

Event will be promoted on September 9. Members will be responsible to submit information on open houses.  
The Finance Manager and District Trio will help to track the new members.

Action 1 Update incentives list by July 31

Action 2 Track incentives on an ongoing basis as add new incentives when new challenges arise.

**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.)

CLUBS:

- Two new Clubs were chartered during the year. 'Lawley Lingo' in Rochester and 'Toast the Grid' in Syracuse.
- Two Clubs [FLCoE in Cortland and Port City in Oswego] have not renewed their membership dues in April 2017.
- Three Clubs [Olean, Crown City, and Geneseo] have not met their minimum requirement of 8 members on the club's roster.
- The new TM year begins with 6 ATO's [Application To Organize] in process.

**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.)

We will work to ensure new clubs have a better support program in place to assist in new club building. In addition, we will continue to offer incentives to new clubs that charter.

Action 1 Create a Helping Hands program to enable each District to have access to resources to conduct demo meetings and to help struggling clubs. The Chair will be identified by

October 1 and will plan to have a group established by November 30, 2017.

Action 2

For every club that charters, the District will provide a banner or a lectern for the club. This will be provided at the time of charter.

Action 3

For a club that chartered in the past year, where the club is still active, the District will provide either a banner and/or lectern, if not already received from the District.

Action 4

Our new Help Wanted section of our Website will be a constant reminder of our District's need for help with sponsors, mentors and coaches. The links to the TI guidelines for these roles will help pre-qualify members that are interested in stepping up to help. This will be reviewed monthly by the Trio 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 a club extension committee, a demonstration team and [infokits@toastmasters.org](mailto:infokits@toastmasters.org).)

The District has access to marketing material from the prior year. In addition, Division A, where much of the growth is taking place, has access to Toastmasters who have been providing members at demo and new club meetings.

### Assignments

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

The District Trio and other DEC members are all participating in the development of new clubs, demo meeting and coaching new clubs. The Helping Hands program is open to non-DEC members as well. We will encourage help from any members that have the time and initiative to offer their guidance, efforts and expertise.

Action 1

Need to expand this effort and identify a single person to migrate this to a District level Plan

Action 2

The Club Growth Director will be responsible to create and manage the incentives here and make sure they are implemented across the District.

Action 3

The Club Growth Director will attempt to find a Club Growth Extension chair in each division to help with the delegation and implementation of the Club Growth plan.

The ideal objective is to work with these Club Growth Extension individuals and groom one

Action 4 or more to be offered and willing to become the next Club Growth Director for the following TI year.

### Timetable

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

We have already begun the process of training and development of our district leaders. This will be ongoing through out the year and be be adjusted as necessary based on leaders that excel and show desire for more responsibilities.

Action 1 September 1, will identify a POC

Action 2 District Incentives will be announced August 1.

Action 3 Incentives will be implemented as needed through out the year. New incentives may be offered as a challenge or need arises.

Action 4 By March, identify potential candidates who can be District Officers, including Club Growth

### 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.)

The District was short by membership payments, Paid clubs, and Distinguished Clubs to be Distinguished. The district fell short by 12 clubs to make the minimum 44 clubs to be Distinguished.

We also noted that clubs are not engaged in having Area Directors visit or competing in club contests.

#### 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.)

Need to ensure District and club officers are trained to ensure knowledge is brought forward to the clubs. In addition, need to listen to the members on key points, where the clubs are having challenges, such as club calendar and planning dates.

We also need to motivate the clubs to become more engaged. By provide a regular source of FUN meeting ideas via our new district newsletter, we plan to get club officers and their members more engaged.

- Action 1 Create an incentive to give \$25 to every club who submits a valid District Success Plan to the District by December 31, 2017.
- Action 2 Create a program, enabling the District and Area Directors to conduct makeup training of all club officers for the summer training and winter training by August 1, 2017.
- Action 3 Modify the calendar to enable clubs to better participate in club contests. The calendar will be updated monthly by the web site manager, as necessary.
- Action 4 Create an award for clubs that were underdogs and have succeeded in improving their club significantly, e.g. This award will be created by November 1, 2017.
- Action 5 Create a Road to DTM program to encourage individuals to earn their DTM as part of Pathways rollout, helping their own clubs be Distinguished. A monthly meeting will be held to enable members to learn more about the DTM.

### 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).)

5) Club member has given access to Zoom webinar software and a group has been established to discuss key projects for DTM and the group meets monthly. Present this concept at the TLI for the club members.

### Assignments

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

5) Ellen Pieklo will work to establish and monitor the DTM group. Entire DEC group will begin visiting and encouraging club officers to develop and submit their club success plan to help their club members reach their individual goals. If club members are reaching their goals, then club goals should be easier to achieve and more clubs will achieve Distinguished levels or better.

- Action 1 Incentives will be announced by DD on August 1.
- Action 2 The PQD is working with DD/AD to ensure makeup sessions are being offered by August 30,

2017 for summer training. .

Action 3

The calendar was modified to enable cub contests to be held until September 15 to ensure more club participation.

Action 4

This has been integrated into the concept of the District Pride Cup by the D65 Trio. We will ensure this is published as part of the incentives program.

Action 5

Continue to monitor the Road to DTM group and will be done by DD. At least weekly, this will be updated as part of the trio meetings.

### Timetable

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

- 1) Incentive will be approved September 9 at the DEC meeting. September 9, 2017
- 2) DEC officers have been trained by July 1. Officer training is in progress at this time. July 1, 2017
- 3) Calendar has been modified - June 30, 2017
- 4) Incentive will be approved September 9 at the DEC meeting. September 9, 2017
- 5) Group was established July 1, 2017

Action 1

Incentives will be announced on August 1.

Action 2

Ongoing, ending on August 31.

Action 3

Completed, calendar is on the web site with new dates.

Action 4

Incentives will be announced on August 1.

Action 5

Ongoing, ending June 31, 2018.

### 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.

Need to improve membership retention and ensure clubs are better monitored. Our goal is to help clubs have more fun while developing leadership and communication skills. Our most successful clubs are helping offer suggestions and guidelines that they use to help struggling clubs build a stronger meeting and member experience.

### 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.)

The D65 has a 50% retention rate of members and has lost several hundred members the past year. Feedback continues to come in that meetings are not TI compliant and that Area Directors may not all be submitting Area Director Reports.

### 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.)

We are trying to better engage the Area/Division Directors with their clubs. We ensured 100% training of the DEC and are working to ensure we have 10-30% more club officers trained.

Action 1    Ensure all DEC officers are trained, by at least 90% by September 30, 2017.

Action 2    Ensure training is provided for makeup sessions.

Action 3    Better monitor Area visits.

Action 4    Provide better outreach to the members using a newsletter with key events and highlighted information.

Action 5    Set up an Administrative Committee and Past District Director/Governor committee to evaluate challenges and opportunities in the District.

### 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.)

D65 used additional money to train DEC officers and ensure people had meals provided as part of this training. We also tried to provide better training sessions for club officers, with meals provided as well.

### Assignments

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

D65 will ensure DEC officers and club officers are trained. We will work to better monitor the pulse of the Toastmasters community.

Action 1

DD will ensure DEC occurs early and to provide makeup sessions to DEC by September 30, 2017.

Action 2

PQD is tracking officer training and DD/AD are being provided information to train those officers who require this.

Action 3

CGD will monitor the AD reports, at least monthly to ensure these are submitted and are being used to effectively help clubs become more engaged, build membership and help members complete communication and leadership awards.

Action 4

CGD, with webmaster and PRM will develop newsletter that will be published monthly.

Action 5

By October, the DD will appoint committee chairs.

### Timetable

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

Time table is still in draft form as Trio is actively working on developing the timeline in a fashion that can be implemented quickly and consistently throughout the year.

Action 1

All DEC training was completed by July 31, with 100% trained.

Action 2

Officer training is expected to be completed by August 30. D65 has had about 300 officers trained to date, of 700 potential officer roles.

Action 3

All ADs have been briefed on club visits and the CGD will monitor this for us.

Action 4 | The newsletter started in July 2017 and D65 has received favorable feedback.

Action 5 | By December 31, the PDD/PDG will come up with improvement opportunities.

PRINT

CONTINUE

**SUBMIT PLAN**