

# D25 Strategic Planning Committee Charter and Plan 2023

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## Introduction

Like many organizations, Toastmasters International creates a multi-year Strategic Plan to address challenges and take advantage of opportunities, both current and in the future. A corresponding five-year District 25 Strategic Plan would facilitate progress towards achieving excellence in serving the member and member clubs. To accomplish developing a District 25 Strategic Plan, the District created a Strategic Planning Committee (SPC).

The Strategic Planning Committee is an advisory board. All final decisions regarding any part of the plan lie with the District Trio (District Director, Program Quality Director, Club Growth Director).

## Purpose

Produce a Strategic Plan to support District 25 leaders in pursuit of the District mission: *We build new clubs and support all clubs in achieving excellence.*

## Scope

The focus is achieving and sustaining District growth. The SPC will

- Analyze, assess, and understand the District's current membership and growth status
- Create an overall Strategic Plan outcome (e.g. *Double the clubs & double the retention in five years [playing off the numbers in the District: 2 and 5]* or another phrase that can be repeated throughout the District)
- Work with District Leaders to create strategies and goals for District growth.

## Deliverables

The SPC will develop one, two, and five-year Strategic Plans by ascertaining the District's current state, researching trends that affect the District, and identifying areas (e.g. District bylaws, actions, resources) where changes are needed.

- The one-year plan addresses immediate needs, trends, etc.
- The two-year plan focuses on elements within the District to be addressed during this period; this may also be a continuation of the one-year plan.
- The five-year plan identifies the overall vision that the District will work toward.

The plan will include objectives and tasks to support the strategies and goals. These objectives will be reviewed and adjusted as the District changes. The number of objectives may increase or decrease, as well, depending on the District status. Tasks may include updates to the bylaws.

The Strategic Plan will include this charter for clarity, understanding, and continuity.

Each phase will address Key Performance Indicators (KPI), which serve as a foundation to achieve long-term sustainable Distinguished District status:

- Membership Growth and Retention
- Club Growth and Retention
- Education and Training

- Revenue & Funding.

Each phase will provide strategies, objectives, and tasks to improve the District KPIs. The SPC will work with District leaders and monitor objective and task implementation.

## Strategies

### Strategy 1: Be Transparent

“Leadership is always a relationship, and truly successful leadership thrives in a group culture of high openness and high trust.” *Humble Leadership: The Power of Relationships, Openness, and Trust* (2018) Edgar H. Schein and Peter A. Schein

The SPC will provide a plan in concise, plain language. SPC Chairman, or designee, will present a report of the Plan to the District Executive Committee and District Council.

A minimum of one Town Hall meeting will be held annually to inform the general membership of the District’s status, specific goals, and the progress made toward said goals. This forum will be used to also gather suggestions for additional goals, objectives, tasks, or changes to be included in future plans.

SPC meetings minutes will be posted in a place accessible by any District Member.

### Strategy 2a: Identify and Develop Future Leaders

“Strong leaders demonstrate a continued willingness to learn, who have a growth mindset, who are willing to be mentored, and who can clearly communicate a vision.” *Willpower Doesn't Work* (2018) Benjamin Hardy

The SPC will assist with identifying, encouraging, and mentoring individuals who demonstrate positive leadership capabilities. These individuals may exhibit (a) demonstrate the ability to lead; (b) adhere to the Toastmasters core values, (c) indicate a willingness to serve as a leader, (d) demonstrate a commitment to the District, and/or (e) exhibit a commitment to their personal growth. Identification of perspective leaders will be achieved via discussions with fellow SPC members, interested members, and/or the current District Director, Program Quality Director, and Club Growth Director.

### Strategy 2b: Mentor and Retain Current Leaders

“No one really achieves anything wholly by themselves.” *The Law of the Inner Circle* (2019) John Maxwell

Leaders often need assistance and guidance. The SPC may provide experienced leaders who can mentor the members of the District Executive Council as the Trio feels necessary. The goal is to assist the leaders to realize their greatest potential while performing their leadership roles with the objective of achieving the Distinguished District Status.

### Strategy 3: Enhance and Monitor Active Marketing Plan

As the marketing environment changes, the SPC will research current and future marketing trends to determine possible strategies to market the District. The SPC provides this data to the Club Growth Team to assist in creating the Marketing Plan. The SPC will track the effectiveness of each method of marketing used by the District.

## SPC Members and Tenure

**Number of Committee Members:** The SPC consists of seven (7) voting members. The Trio are Ex Officio members to provide added information on agenda items. One of the seven member slots is reserved for the Immediate Past District Director to become a member if they desire to participate in the committee.

**Member Composition:** Ideally, the SPC represents a diverse makeup in District membership. Therefore, the selection of a member is based on the following:

- Geographic (location where the person's club or service is located)
- Demographic (diversity of cultures)
- Toastmaster Experience (length of membership and service to club and District)
- External Experience (leadership experience outside Toastmasters)
- Type of club membership – Open (Community) & Closed (Corporate)

**Committee Organization and Term of Membership:** To ensure the transition and continuation of the committee, the committee members will annually select the following officers:

- **Chair** – Oversees all objectives as set forth by the Committee. The Chair or their designee will be the representative of the Committee at meetings with the Trio and the District Executive Council. The Chair or their designee will be the representative to deliver the report on the condition of the District, the status of the Strategic Plan, and the progress thereof to the District Council at the May Business Meeting. Chair should be a second year member or longer, when possible.
- **Vice Chair** – Performs all said duties of the Chair in the absence of the Chair.
- **Secretary** – Records the minutes of all meetings as appropriate. Said minutes will be available to be examined by any District member requesting access to the minutes. This is in keeping with the value of conciseness and full transparency to the District and its members.
- **Parliamentarian** – Advises the Chair and/or Vice-Chair the appropriate protocol and ruling in conducting various issues as they may arise in a meeting. The SPC will follow Robert's Rules of Order to conduct meetings in a professional and concise manner.

**Committee Selection:** The general membership of the Committee will identify prospective members. The aim is to never have an empty seat on the Committee. Therefore, a list of said prospects will be reviewed by the District Trio (District Director, Program Quality Director, Club Growth Director) for approval. The District Trio has 2 weeks from date of submission to approve or disapprove all or part of the list provided. If the District Trio fails to respond back to the Committee with its decision(s) within the stated time frame, the Committee has the right to accept all the persons listed as members of the Committee. In addition, the following results of said review may apply:

- If the District Trio approves all individuals listed, individuals will begin their term of membership on May 1 or closest date possible that applies to filling an unexpected SPC vacancy.
- The District Trio approves some individuals and not others on the list.
- The District Trio provides valid reasoning for each individual not approved.
- The SPC can override said disapproval with 2/3 vote after consideration of the District Trio's reasoning.
- If the District Trio disapproves, the individual may be placed on a future listing to serve on the SPC once the issues concerning the District Trio have been rectified.
- SPC membership is approved by the District Executive Council at the Spring business meeting.

**Term of Membership:** Each SPC member is appointed for a 2-year term. The term of membership will begin on the first day of May and end on the last day of April two years hence (i.e. May 1, 2022 thru April 30, 2024). The initial SPC members may serve 3-year terms or until a full SPC is functioning as set out in this Charter. The initial members will be rotated off the SPC in a manner to have at least one original member on the SPC at the end of the third year.

**Exceptions to serving full term:** There may arise a situation when a member cannot fulfill the full term. The Committee can appoint a new member as follows:

- Less than 1 year remaining in the original term: The new member will complete the original term and may opt to continue to serve for an additional full 2-year term. For example: The original member leaves with 4 months remaining in their term. The new member can finish out that term and serve an additional full term.
- One year or more remaining in the original term: The new member will serve out the original term but will be replaced at the end of the term. The new member can return to a full term after taking a year off the Committee.
- Members who have served full terms must be replaced at the end of the full term. They may return to serve another full term after taking one year off.
- Once the Committee is fully functioning, half the Committee membership will be rotated off the membership.

**Governance of Member's Conduct:** SPC members are to uphold the Toastmaster values, conduct themselves in a professional manner, maintain equanimity, and confidentiality throughout their term of membership and beyond. If a member becomes disruptive to the SPC's processes and function, the SPC has the right to remove said member by a 2/3's vote of the SPC's general membership.

## Planning Process/Dates

The SPC will meet at least four times during the year formally with additional meetings added as needed. The formal meetings are included on the District Key Date Calendar. Each meeting will focus on reviews (i.e. Bylaw Objectives, timelines, etc.) as well as new business

### January

- Current District Director, soon to be IPDD, tells us if they are joining
- Hot Topics Article to ask for Applicants
- Applicants due to SPC Jan 31

**February**

- Recruiting begins if no applicants
- 4th in person meeting
- Get on trio calendar for March
- Committee elects next Chair

**March**

- Plan sent to trio for review and approval (remind to put us on DEC agenda)
- Slate to trio for review, replace 3 or 4 depending on the year

**April**

- Plan to DEC for review and approval
- Committee elects its officers

**May**

- SPC present plan to DC at District Business Meeting
- New SPC committee takes office at close of District Business Meeting
- Plan becomes effective at close of District Business Meeting
- Charter also effective, material charter changes can be DEC approved as needed (log these)
- SPC hosts a virtual meeting after conference (welcome new members)
- Mentors get set up/meetings get sent (helping people be successful, follow up, getting buy in)

**June**

- Plan year post mortem: what worked, what didn't
- Town Hall (Example: 4th Thursday-put on key date calendar-June 22, 2023)
- First informal meeting of the SPC
- 1st in person meeting

**July**

- SPC formal meeting
- Town Hall dates to trio to be placed on key date calendar
- Committees picked by members

**August**

- 2nd in person meeting
- SPC assists trio in review of district success plan and marketing plan
- IPDD if joining joins committee, committee down a person until August

**September**

- SPC report at DC

**October**

- 3rd in person meeting

**November**

- call for new members at Summit



## December

- Hot Topics, application starts

## Plan

*See Appendix*

## Appendix: Plan for 2023

### Goal Setting

The District will generally set goals based on the Distinguished Club Program (DCP) baseline. The following goals are in addition to the DCP goals and meant to focus on building a plan to be a Distinguished District within the next 4 years and maintain at least that status.

- Club Growth and Retention
- Membership Growth and Retention
- Education and Training
- Revenue and Funding (*addressed within other sections as applicable*)

### 5 Year Plan

Year 1: July 2023 – June 2024

Year 2: July 2024 – June 2025

Year 3: July 2025 – June 2026

Year 4: July 2026 – June 2027

Year 5: July 2027 – June 2028

### SPC Target Minimum Goals based on TI Metrics

Year Ending June	Paid Clubs	Member Payments	Distinguished Clubs
July 2022 -3	Net 0	Net 0	30%
2024	1%	1.50%	40%
2025	1.50%	1.50%	45%
2026	1.50%	3%	45%
2027	3%	5%	50%
2028	3%	5%	50%

### TI Performance Goals (for reference)

Percent growth from baseline, July 1 of year

	Paid Clubs	Member Payments	Distinguished Clubs
Distinguished	1.50%	1.50%	40%
Select	3%	3%	45%
President	5%	5%	50%
Smedley	8%	8%	55%

## Club Growth and Retention

### Marketing Plan

The first real task of a newly elected Club Growth Director (CGD) is to develop a marketing plan. Most CGD rely on the foundations of the previous plan or with the experience of the other two Trio members to form the initial plan. Over time, the plan becomes more and more disconnected on where the focus should be to get the most benefit on maintaining growth within District 25.

Here are some of the issues the CGD faces when writing their plan:

- Lack of in-depth knowledge of previous plan successes or failures
- Creating the District budget before it is fully understood where and how much is needed to support the new marketing plan
- Growing new clubs in the first quarter of the Toastmasters year
- Having a small marketing team or a passive marketing team

This plan is not meant to serve as a step-by-step, but more of a guide on how to build the foundation of the plan.

### Accountability

It is recommended for the District Trio to review the District Success Plan (DSP) with the SPC to ensure the SPC monitors the progress of the plan throughout the Toastmasters year. The SPC should provide periodic reports that indicate whether the District marketing plan is on-track or needs realignment to get back on track. Reviewing the DSP with the SPC will also ensure there is clear understanding with how the SPC can help support the marketing team

### Methodology to Develop Marketing Plan

The following items are some suggested areas to focus on or questions to ask while developing the marketing plan. While it is not an all-inclusive list, they should illustrate the type of areas that can be explored further.

Topic	Sources	Areas to focus on
How to understand the previous plan	<ol style="list-style-type: none"><li>1. Previous CGD</li><li>2. Previous marketing team</li><li>3. Former Trio members</li><li>4. TI dashboards and trending reports</li></ol>	<ol style="list-style-type: none"><li>1. Study current plan as soon after the election as possible</li><li>2. Ask questions about marketing successes and failures</li><li>3. Discuss how new ideas can be implemented</li><li>4. Understand geographical constraints – where did the previous plan focus and why?</li></ol>

		<ol style="list-style-type: none"> <li>5. Is there enough or too much focus on retention of current clubs – how do you reduce attrition?</li> <li>6. Use reports to determine trends and how they relate to current plan</li> <li>7. Conduct a survey with recently dissolved/suspended clubs to better understand constraints</li> </ol>
How to manage the district budget	<ol style="list-style-type: none"> <li>1. Current Trio</li> <li>2. Previous Finance Manager</li> <li>3. Recognition chair</li> <li>4. Previous budget</li> </ol>	<ol style="list-style-type: none"> <li>1. Were the previous incentives effective in growing/retaining clubs?</li> <li>2. How much will your new ideas cost? Can the budget afford them?</li> <li>3. Does the cost support the District mission?</li> <li>4. Start researching as soon as elected</li> <li>5. Ask current Finance Manager to explain how budget limits for each category</li> </ol>
How to develop new leads	<ol style="list-style-type: none"> <li>1. Previous marketing team</li> <li>2. Previous CGD</li> </ol>	<ol style="list-style-type: none"> <li>1. Are any leads from previous year viable?</li> <li>2. Make 10-15 cold calls per month to create 15 min Q&amp;A sessions with key stakeholders</li> <li>3. Leave marketing material at new business locations that have 200-500 people in the location</li> <li>4. Have proactive reporting of pipeline</li> </ol>
How to create a marketing team	<ol style="list-style-type: none"> <li>1. Previous marketing team</li> <li>2. Previous CGD</li> <li>3. Former Trio members</li> </ol>	<ol style="list-style-type: none"> <li>1. Empower all chairpersons to form a committee – extension chair and leads especially</li> <li>2. Hold marketing team accountable by asking for reports on cold calls</li> <li>3. Expand teams beyond the marketing team and District Executive Committee to all club members</li> </ol>

		4. Over communicate the need to have more leads than just what is sent by Toastmasters International
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**Year 1:** Complete 2022-2023 year retro and write plan for future years.

## Membership Growth and Retention

### District Success Plan

Each year the Trio submits a District Success Plan (DSP) to Toastmasters International World Headquarters. This is the plan for the year on how the leadership will serve their members. When creating the DSP the trio should focus the incentive portion on the Distinguished Club Program. Earning DCP goals is designed to create happy successful members that creates strong and healthy clubs that accomplish the District mission. Consider a plan to Communicate Nemileta success stories to members.

### Communication to Membership

#### Year 1:

Getting the right information at the right time to the right members is an ongoing challenge in Toastmasters. The 2022-2023 PRM has seemed to crack the code on some of this. Their knowledge and plans executed this past year should be documented and reviewed to be replicated in the coming years.

#### Year 2:

Toastmasters International and District 25 have an abundance of opportunities that aren't utilized. It's believed that most of the membership is not aware of the opportunities. Research and then a plan needs to be developed to get the information to the member.

#### Year 3:

The District uses a monthly newsletter called Hot Topics to communicate information about events, success stories from our members, and celebration of milestones. The open rate and read rate are not where we want it. Research should be done to discover how we can get the read rate higher.

### Quality Member Experiences

Having a quality member experience is paramount to retention. Clubs in District 25 will benefit from materials, education, and general awareness of how to accomplish a quality experience for all members in the club and outside of the club.

#### Year 1:

Create a plan of action to update/review/remove club and meeting resources on the D25 website as well as how to make members aware they exist. Consider having Area Directors trained to lead their clubs to the website and find the plethora of knowledge.

The following are suggestions to add to the current resource. The website should make clear these are just suggestions to use as a resource and in no way are mandatory to use.

**How To:**

1. A template to create a quality meeting Agenda
  - a. Ensure meeting quality - agenda
  - b. thoughtful (designed to provide value)
  - c. pre-prep
  - d. organization
2. Reach out to members who are not present; you are missed, not why weren't you there, encourage not nag
3. Email recap – hey we missed you, and here is what you have missed, come back, opportunity to fill a role
4. Timing of meetings – as a club, you can change the day/time to make it easier to attend
5. Promote and refine virtual component -hybrid

**Research/Define:**

1. What is the definition of successful club – not just DCP goals, not just distinguished
2. Have enough members to do roles/not get burnout
3. District events to other areas – Mineral Wells, Waco, increase demographic area for larger events
4. More training, more sessions, different trainings, more opportunities for training around increasing efficiency
5. Charge correct amt \$\$\$ for virtual attendance – figure out what this amount is and what virtual experience we want to offer with what value

**Year 2:**

Add to the list above:

**Research/Define:**

1. District holds a quality meeting as an example: Tune in to a quality meeting possible addition to Nemileta 9
2. Hybrid strain – how to address?
3. Sponsor/mentor – revitalize this program, accountability buddy (Buddy System)– CALL, check in in between times, guidelines, checklist – 3 speeches?
4. Mentoring – more robust - Back to mentor
5. Nemileta 9 extra component to mentor a member outside your club? No experienced TM to mentor new ones in a particular club, how to overcome that

**How to:**

6. Communications – update website weekly; officer weekly update with reminders (corporate clubs possibly good at this, how to mirror in community club)

**Year 3-5:**

Add to the list above

**Research/Define:**

1. How to use a monthly resource team
2. Use monthly club dues to create fund for members of club to attend
3. Event committee and culture committee
4. Open house, election demos
5. Cross club officer meetings, VPPRs get together (PRM), VPPR FB page; member to member
6. Sponsors - scholarship fund

**How to:**

7. Personalized communication from Pres, reminder that they are wanted, inclusion, nice piece first (promote accountability),
8. Remind to speak and achieve in pathways,
9. Balance comms – not too little, not too much

[Understanding the ROI & WIIFM](#)

**Year 1:**

Members need to understand What's In It For Me (WIIFM) also known as Return on Investment (ROI) in order to take on anything outside of being a club member.

A plan needs to be created to communicate/make available the ROI/WIIFM for:

1. All District Officers and Staff
2. Contests
3. Pathways adoption

While creating these plans, member burnout cannot be ignored but planned on how to avoid.

**Year 2:**

Add to the above list:

1. Club Success Plan
2. Distinguished clubs
3. Area Council
4. How DCP goals impact other DCP goals
5. Involvement at Club, Area, Division, District, and beyond

With these plans, involvement from the Area Director is imperative to create and maintain a relationship to the clubs. The Area Directors will be the voice of the plans/documents.

**Year 3-5:**

Develop metrics or implement those already available to watch and encourage clubs. These should be used by all District Officers and Staff.

## Recognition

Recognition works to not only celebrate the achievements of our members but to also showcase that goals can be achieved. There is no one size fits all - recognition comes in many forms, can cost as little as nothing, and is easily achieved by continuous praise!

Recognition should be Individual and most important consistent to keep our members engaged.

## Member Recognition

### Year 1:

Develop a more individual and consistent template of how to recognize our members.

To better 'lighten the load' of the plan, make use of current roles including recognition and outreach chairs to recognize:

1. Charter Anniversaries
2. Membership Anniversaries
3. Level Completions
4. Path Completions
5. DTM Achievement

## President's Breakfast

### Year 1:

In District 25 we have a tradition of a formal Club President's Breakfast during the winter TLI season. This breakfast is the opportunity to reach out to those who hold the CEO role for our clubs to feel a part of the District and begin to look toward District Service.

This recognition should include, but not limited to:

1. Breakfast (if able)
2. Keynote speaker
3. Specialized Presidents Training
4. Leadership Panel/Open House Supplemental (unopposed)

### Year 2:

With a plan created in Year 1, determine how to allocate TI bucks (gift Cards) or donations to be used for scholarships to District Events

## Identify Future Leaders

There are no lack of leaders in District 25, but our members lack direction on how to channel their skills and energy into serving the District. Creating a direction puts them on a leadership path that motivates them to stay beyond the initial first year of service.

**Year 1:** Review and update leadership roadmaps and sample roadmaps.



Create a plan to keep members from the Leadership Open House and Area Director Reports engaged and progressing in their leadership path. When planning, consider a mentoring program, focusing on creating a bench of leaders to help with succession, and having an assistant for all leadership positions including how to use one.

## Leadership

### **Knowledge Transfer:**

#### **Year 1:**

We must not lose knowledge gained by members. Each year there will be a knowledge transfer activity, to not start later than June 1<sup>st</sup>, to ensure a good start on July 1, the first day of the Toastmasters' year for all District Officers and Staff.

Knowledge Transfer (KT) will include (but not limited to):

1. Documents
  - a. Anything created/used during the previous year
  - b. Templates
  - c. Notes
2. Lists of interested members
3. Lists of involved members
4. Key dates for the role
5. Contact information as needed
6. Lessons learned specific to the role/best practices

KT is best done face to face in person or over a virtual platform. The pace of the meeting is dependent on the learning/absorption rate of the incoming member. The outgoing member remains open to further KT meetings as needed.

### **Understanding the Commitment**

#### **Year 2:**

Stated obstacles for District Leadership is time and the want to better understand the 'true' commitment. It's easy for leaders to undersell and be misunderstood about the commitment in conversation. A one page document (for example) should be created to outline the specific job tasks, deadlines, responsibilities, and time commitments to level the conversation. This should be done for all District Officer and Staff positions. This is to be more specific task-oriented descriptions that enhances the information already available from TI.

### **Corporate Club Participation**

#### **Year 2:**

A plan should be created to target corporate club members for the purpose of District participation.

## **Remove barriers to serving**

### **Year 3:**

1. Encourage co-chairs to lighten the load and share knowledge
2. Encourage splitting of tasks for more to learn and lighten the load

### **Year 4 – 5:**

1. Focus on the right person for the job, not just a warm body
2. Consider budgeting for travel reimbursement (i.e. mileage, hotel, food, any other possibilities)

## **Mentor and Retain Current Leaders**

Step one of any leadership program is having a member say yes to volunteering for a leadership position. Step two is making sure they are successful at that position. Step three is to motivate them to continue saying yes to future opportunities. Seems like a simple plan, no?

Here are some of the roadblocks most leaders face:

- Managing priorities of assignments
- Having a work/life balance
- Procrastinating deadlines; then rushing to complete the action
- Having minimal training opportunities
- Knowing where to turn to get answers

This plan will outline some suggestions on how to mentor and retain current leaders.

## **Accountability**

The SPC should be an active part of mentoring the current and future leaders. During the meetings with the Trio, the SPC should get feedback on progress for establishing and retaining leaders.

## **Mentoring**

A mentor is defined as a person who has the knowledge to guide the protégé for the leadership position they currently have or are seeking. They should primarily listen and offer suggestions that help guide the protégé towards a solution. The protégé should plan all meetings and provide a written agenda prior to or at the beginning of the meeting. This will help the meeting stay on track.

Having a mentor with regularly scheduled meetings is a proven path to success. To neglect this path is to state you know all and can do it all by yourself.

The following should be the minimum that is implemented in each Toastmasters year:

1. All Trio members should have at least one mentor. A former Trio member is an excellent choice but is not required. Meet with this mentor at least once a month.
  - a. All Trio Members should begin their mentoring sessions as soon as possible after the Annual Business meeting.

- b. CGD - See marketing plan for focus areas.
2. Trio should meet with the Division Directors at least once a month; one-on-one sessions can be established as needed
3. Division Directors should meet with Area Directors at least once a quarter in addition to the District Executive Committee/Training meetings
4. Trio should meet with the Finance Manager, Public Relations Manager, and Administrator Manager at least once a month
5. SPC should meet with the Trio a minimum of once a Toastmasters quarter; more regularly if more discussions are needed. SPC should be focused on how to support the Trio. SPC and Trio discuss important updates from Toastmasters International World Headquarters.

The meetings described in 1-5 above should focus on, but not be limited to:

1. Review Action Items from last session
2. Where are you (status of functional area)
3. What help they need
4. What questions they have
5. What guidance is needed
6. What's on the horizon (next steps to be successful)
7. Plan Action Items for both parties

Meetings are virtual or in person and of a length that satisfies the need. They can be quick 15-minute chats or longer multi topic meetings. Meetings should allow for one-on-one time but should also allow for group meetings.

**Years 2-5:** Expand the above to include all District Officers and Staff.

## Education and Training

### TLI

#### **Year 1:**

Offer Speaker to Trainer Workshop at least 2 times per year, one before each TLI season begins. Maintain list of willing and able facilitators for this workshop, so as not to rely on just one or two people who can facilitate it, perpetually replenish the list. Build requirement to take this as part of best practices for TLI trainers. Maintain list of eligible TLI facilitators as part of best practices.

Update President, VPED, and Secretary training modules (focus on base camp managers first)

Create a TLI sub-committee; TLI Supplemental session around DCP but called something different; retaining members; Alternative venues, set up – educational institutions, community centers, hotel; Make a process document for how to run a TLI that includes what is expected of each role, minimum people needed, Speaker to Trainer workshop process, suggested schedule, suggested locations, format, WIIFM, etc.

Offer more trainings, more sessions, different trainings, more opportunities for training around increasing efficiencies.

**Year 2:**

Update all other officer training modules. Build a process to evaluate and update all on a regular cadence.

Research and create a plan to enhance the virtual attendee learner experience.

**Year 3:**

Continue adding value to the virtual attendee learner and consider recorded training that is easily accessible. Consider learning avenues such as TLI On Demand.

### District Officer Training

**Year 1:**

Standardize Division Director Training before Leadership Retreat

1. Formalize and set expectations of Division Councils (cover at DD training)
2. Create and share templates: wording for renewing dues - Communicate why to renew
3. Create and share templates: scripted communications for DD/AD to communicate down to AD/Clubs respectfully

**Year 2:**

Division Director deeper dive into all subjects – focus on operational Expand Division Director training (i.e., Division Directors start at 6am, Area Directors at 9am)

**Year 3:**

District Leadership Development – all of this boils down to training (expanded DD training, TLI, AD)

### Conference/Summit

**Year 1:**

Cost is a stated barrier for many of our members to attend the Summit and the Conference each year. The District has an obligation to make each event as affordable as possible without compromising quality. An avenue to decrease costs is sponsorships for the event. Each event cycle, Corporations of our clubs should be approached to sponsor agenda items or in general. Templates and process documents should be created to help with this effort.

**Year 2:**

Most members are not aware that we offer a virtual experience for our large events. An effort to plan marketing, specifically to our outlying areas, should be developed to increase participation in District events.

**Year 3:**

Cost being a barrier to our outlying areas to attend District events in person and research the appetite for host houses – locations members can stay for a night or two to attend events.