


**TOASTMASTERS**  
INTERNATIONAL

2020-2025

## **District 66 Toastmasters Five-Year Plan**

The Five-Year Plan is a long-range, strategic plan for District 66 Toastmasters.

In particular, the District Five-Year Plan represents the vision and strategy for District success over the next several years.



June 1 , 2020

The Strategic Planning Committee for District 66 is pleased to present this strategic plan to the District's Leadership (TRIO). The strategic plan provides a clear vision consistent with the vision of Toastmasters International but also provides practical steps for implementation.

The committee took into consideration the evolving landscape for businesses and the need to develop new innovative and creative approaches to learning. A good strategic plan must provide strategy, systems, and accessible resources to increase the sustainability of Clubs while at the same time fostering a culture for members and leaders to thrive.

We recognize the hard work and the continuous efforts of the TRIO and District 66 leaders. However, we also recognize the need for strong internal controls, effective management systems, and that standardized operational processes provide the necessary foundation for success. It is our hope that this document will guide the future and continuing success for District 66.

We are grateful for the time and effort of all those who took time to answer questions and contribute to the development of this useful resource.

Sincerely,

Juanita S. Farrow, MBA, ACB  
Strategic Planning Committee, Chair

# Introduction

Recognizing the need for a strategic plan, the District's leadership appointed a strategic planning committee in 2015 to develop the first strategic plan for District 66. To review and build on the existing strategic plan, a committee was appointed to develop a strategic plan for the next five years.

The instructional guidance for the development of the plan was provided by the District's leadership and was as follows:

## **Background:**

“Toastmasters District 66 Five Year Plan is expressed in continuing general principles regarding important, high-level and strategic subjects, adopted and revised by a committee appointed by the District Director. The District's Five-Year Plan is a rolling plan. The content of the five-year plan is a statement of direction for the district. The content must be audited periodically to eliminate confusion, redundancy or irrelevance that can occur over time.”

## **Committee Assignment: (Complete audit of the current five-year plan)**

- Review each section to ensure clarity and accuracy
- Ensure there is no conflict with District/TI By-Laws
- Ensure the plan is updated to reflect real-world practice
- Review to any other recent District recommendations that impact the District/TI By-Laws
- Follow the Methodology Chart and Priority Matrix to define, plan, budget, measure, and prioritize the Committee's work recommendations.

## **The Committee is NOT tasked with:**

- » Creating a new five-year plan
- » Making changes to five-year plan that are philosophical
- » Change or modify permissions or restrictions to operations

This plan is designed to take advantage of technology innovation and the evolving landscape for businesses and organizations. Although the principal audience for the strategic plan is the District's leadership, the plan contains pertinent information for all District leaders and Club members.

Every attempt has been made to make the plan user friendly by providing a "how-to" for implementation with a continued focus on sustainability. This plan follows the 2015 Toastmasters International Strategic Plan characterized by three elements with the exception that *GOALS have been modified to reflect Desired Outcome:*

- » **DESIRED OUTCOME,**
- » **SUCCESS MEASURES, AND**
- » **STRATEGIC INITIATIVES.**

The areas of focus for this District 66 five-year plan closely track the results of the strategic planning committee for Toastmasters International:

- 1. SUPPORT CLUB EXCELLENCE**
- 2. ENCOURAGE MEMBER ACHIEVEMENT AND**
- 3. INCREASE AWARENESS, ENGAGEMENT, AND PARTICIPATION.**

For each of the focus areas, the goal is defined along with the success measures. The strategic initiatives further outline the theme, objective(s), and recommendation(s). The plan references additional content in the **ADDENDA**.

*"The purpose of the addenda is to strengthen the plan's effectiveness and increase sustainability by providing a "roadmap" or a structured approach for implementation. The strategic plan developed allows for ongoing measurement of success along with a bottom up approach to Club members' education. The committee proposes a strategic planning steering committee to assist the District 66 TRIO as they lead the District and our members into the future."*



# District 66 Toastmasters Five-Year Plan 2020 - 2025

*The Five-Year Plan is a long-range, strategic plan for District 66 Toastmasters.*

*In particular, the District Five-Year Plan represents the vision and strategy for District success over the next several years.*

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**ADDENDA**

- ADDENDUM - OVERVIEW**
- ADDENDUM - DISTRICT 66 GUIDANCE COMMITTEE**
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- ADDENDUM - METHODOLOGY CHART**
- ADDENDUM - MEMBER EDUCATION SECTION**
- ADDENDUM - VPPR**
- ADDENDUM - VPM**
- ADDENDUM - VPE**

# Planning Committee

**DISTRICT TRIO:**

**WILLIAM D. TYREE III, DTM, DISTRICT DIRECTOR (2020 – 2021)**

**MAGGIE GEOGHEGAN, DTM, PROGRAM QUALITY DIRECTOR (2020 – 2021)**

**AL TUTEN, DTM, GROWTH DIRECTOR (2020 – 2021)**

**PLANNING  
COMMITTEE  
MEMBERS**

**PLANNING COMMITTEE MEMBERS:**

**JUANITA FARROW, ACB - CHAIR**

**REGIE FORD DTM**

**VINCENT LIEU, DTM**

**ROBERT TURCOTTE, DTM**

**DISTRICT 66 GUIDANCE COMMITTEE, CHAIR**

**LINDA KENNEDY, DTM, PAST DISTRICT DIRECTOR, (2020 – 2021)**

# Mission Statements and Core Values

**Toastmasters  
International  
Mission**

We empower individuals to become more effective communicators and leaders.

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**District Mission**

We build new clubs and support all clubs in achieving excellence.

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**Club Mission**

We provide a supportive and positive learning experience in which members are empowered to develop communication and leadership skills, resulting in greater self-confidence and personal growth.

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**Core Values -  
Toastmasters  
International**

Integrity  
Respect  
Service  
Excellence



# Vision Statements

**Envisioned  
Future -  
Toastmasters  
International**

To be the first- choice provider of dynamic, high- value, experiential communication and leadership skills development.

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**Vivid Description  
of the  
Envisioned  
Future -  
Toastmasters  
International**

Toastmasters International is recognized by its members as relevant and invaluable for their personal and professional success. Employers recognize Toastmasters International as an essential component of their employees' professional development. Through its clubs, Toastmasters International provides a vibrant, growing, and successful communication and leadership development program. Club members receive a high- quality, customized experience in a supportive environment that responds to individual and community- specific needs. A clear path to success is known. Members take risks and experiment knowing that they are supported and encouraged by others to maximize their potential in reaching personal and professional goals. Toastmasters International uses technology effectively to save time, communicate and deliver services. Toastmasters International is globally recognized as a progressive, responsive and experiential program that changes individuals and the world for the better.

# Planning Principles

## Origins of the Five-Year Plan

Our efforts in District 66 are in concert and in agreement with efforts by Toastmasters International. From the 2015 Strategic Plan for Toastmasters International. Using our assumptions and aspirations about the future, the Strategic Planning Committee and Board of Directors began the creative and deliberative process necessary to develop the 2015 Strategic Plan in August 2014. Each group conducted a SWOT analysis and reviewed an environmental scan prepared by World Headquarters. In November 2014, the Strategic Planning Committee synthesized and prioritized the results from both groups. Three areas of focus emerged:

1. Club Excellence
2. Member Achievement
3. Awareness, Engagement and Participation

## Strategy for the Five-Year Plan

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This 2015 Toastmasters International Strategic Plan is characterized by these elements:

- ♦ *GOALS* are outcome-oriented statements that guide and measure the organization's future success. The achievement of each goal will move the organization toward the realization of the Envisioned Future. \*

\* District 66 has opted to use **DESIRED OUTCOME** to more accurately reflect the intent of this strategic plan.

# Planning Principles

## Strategy for the Five-Year Plan continued

- ◆ **SUCCESS MEASURES** further clarify direction and are statements that describe what the organization needs to accomplish in order to reach the goals.
- ◆ **STRATEGIC INITIATIVES** focus on achieving specific objectives or closing the gap between a measure's performance and its target.

The critical success factors, as detailed in the District Success Plan for that year, should be informed by the objectives outlined in this strategic plan.

The areas of focus for this District 66 five-year plan closely track the results of the strategic planning committee for Toastmasters International:

1. **SUPPORT CLUB EXCELLENCE**
  2. **ENCOURAGE MEMBER ACHIEVEMENT**
  3. **INCREASE AWARENESS, ENGAGEMENT, AND PARTICIPATION**
-

# Support Club Excellence

**Desired Outcome:** Ensure that clubs consistently deliver on the brand promise

**Success Measures:** Membership Payments: 3% growth in years 1-2, 5% growth in years 3-4, 8% grown in Year 5

## Strategic Initiatives:

| Themes  | Objectives   | Recommendations  |
|---|--|--|
| <p><b>Develop Future Leaders: Get club leaders to commit to overall club operations (education, membership growth, and culture)</b></p> | <p><b>Achieve Average 8+ Club Members attendance at TLI</b></p> <p><b>Use current statistical number as a base to monitor and calculate the progression of leader attendance.</b></p> <p><b>Improve the quality/content of TLI training sessions: increase knowledge of Toastmasters leadership program with focus on club operations and can-do attitude toward club leadership.</b></p> <p><b>75% of Elected Offices contested</b></p> | <p><b>Year 1. Develop Leadership Development Plan (<u>Addendum - District 66 Guidance Committee</u>), including more options and flexibility for additional follow-on leadership training on-line, (high quality leadership training webinars)</b></p> <p><b>Revitalize training program with rich-content leadership program with focus on club-excellence approaches to each officer role, e.g. Membership, PR, Club Finance, etc. (<u>Addendum - Member Education Section</u>)</b></p> <p><b>Year 2. Launch leadership development plan Create an on-line certification process for or trainers. (Trainers should be held to a higher standard). Continuously get club leaders to engage in strategic planning, i.e., Club Success Plan, ensuring progress being tracked and monitored. (<u>Addendum - Member Education Section</u>)</b></p> <p><b>Year 3. Assess emergence of leadership potential (<u>Addendum - District 66 Guidance Committee</u>)</b></p> <p><b>Year 4. Mentor emerging leaders (<u>Addendum - District 66 Guidance Committee</u>)</b></p> <p><b>Year 5 New leadership to train/identify new leadership (<u>Addendum - District 66 Guidance Committee</u>)</b></p> |

**Strategic Initiatives continued:**

| Themes   | Objectives  | Recommendations  |
|--|---|--|
| <p><b>Strengthen Technology Infrastructure and Support</b></p> | <p><b>Develop a technology task force to assess and implement long range technology plan</b></p>  | <p><b>Year 1. Develop long range technology plan to include survey/needs assessment.</b><br/> <b>Examine what is working; Connect Internal Board of Directors and attach to VPPR plan:</b></p> <ul style="list-style-type: none"> <li>♦ <b>Technology assessment of infrastructure and support systems</b></li> <li>♦ <b>Develop recommendations based on assessment</b></li> <li>♦ <b>Analyze recommendations and feasibility based on budget</b></li> <li>♦ <b>Implementation plan developed</b></li> <li>♦ <b>Implement</b></li> </ul> <p><b>Year 2. Develop standards and best practices from other Regional and District.</b><br/> <b>Year 3. Integrate into WLI and SLI training. (<u>Addendum - Member Education Section</u>)-</b><br/> <b>Year 4-5. Continue to assess and monitor progress</b></p>                  |
| <p><b>Obtain Club Strength to charter or higher</b></p>        | <p><b>Achieve club strength of 20.0+ members</b></p> <p><b>Utilize dashboard to analyze current statistical numbers across District as bases for tracking monitoring for progress. Adjust plan as deemed necessary...</b></p> | <p><b>Year 1.</b></p> <ul style="list-style-type: none"> <li>♦ <b>Implement WLI and SLI standardization models for VPE, VPPR and VPM (<u>Addendum - Member Education Section</u>).</b></li> <li>♦ <b>Align club evaluation expectation between club officers and area directors. i.e. Develop a more comprehensive assessment process for Area Visits including pre-site visit prep with President/designee, visit, on-site Technical Assistance and Corrective Action Plan with follow-on monitoring. (<u>Addendum - Member Education Section</u>)</b></li> </ul> <p><b>Year 2.</b></p> <ul style="list-style-type: none"> <li>♦ <b>Evaluate success of strengthening clubs</b></li> <li>♦ <b>Develop portfolio of “Best Practices” or “Promising Practices” “Lessons Learned” scenarios that can be (cont.)</b></li> </ul> |

**Strategic Initiatives continued:**

| Themes  | Objectives                     | Recommendations   |
|---|--------------------------------|---|
|   |                                | <p>submitted by Clubs. i.e. Club that increased membership by 25% in one year: Problem, Solution/Implementation, Results (Highlight some of these scenarios at Dist. Conf but make examples accessible to Clubs online as reference).</p> <p>Year 3-5 Continue to evaluate success on strengthening Club membership.</p>  |
| <p>Retain members at the club level</p>                       | <p>Reduce attrition to 25%</p> | <p>Year 1. Develop formal retention plan and rollout to Clubs. Implement Retention strategy using VPE model (<u>Addendum - VPE</u>)</p> <ul style="list-style-type: none"> <li>◆ Create individualize performance plan for each new member; implement ongoing monitoring process to track each member's goals for joining TM against actual accomplishments; assess quarterly performance.</li> </ul> <p>Year 2. Implement additional creative strategies to support retention. i.e. Develop networking opportunities for members; networking based on common interests, based on like skills etc; professions, businesses etc. across Areas, Divisions. Offered to members interested in participating and serves as a resource to strengthen relationships and build community within TM.</p> <p>Year 3-5 Continue to strengthen retention efforts.</p> |
| <p>Increase community presence and communication strategy</p> |                                | <p>Years 1-2: Craft targeted advertising strategy for District 66</p> <ul style="list-style-type: none"> <li>◆ Use technology to aid the effort to increase public awareness (traditional and modern media). (<u>Addendum - VPPR</u>)</li> <li>◆ Increase awareness in the community by targeted advertising/developing strategic</li> </ul>  |

### Strategic Initiatives continued:

| Themes | Objectives  | Recommendations  |
|--------|---|--|
|        | <ul style="list-style-type: none"><li>• Increase opportunities for partnerships/ speaking engagements for members in the community</li><li>• Strengthen Club public relations strategy.</li></ul> | <p>partnerships with community groups.</p> <p>This ties in with the third strategic initiative goal (<i>Awareness, Engagement and participation</i>).</p> <p>Year 3-5 Continue to increase community presence and communication strategy</p> |

# Encourage Member Achievement

**Desired Outcome:** All clubs deliver a consistent, high-quality member experience.

**Success Measures:** Distinguished District Program: Club base 40% in years 1-2, club base 45% in years 3-4, club base 50% in year 5 and 55%

## Strategic Initiatives:

| Themes   | Objectives  | Recommendations  |
|--|---|--|
| <p>Utilize standard communication channels known to everyone</p> | <p>Establish a baseline District survey/needs assessment for to determine communication needs</p>   | <p>Year 1: Conduct baseline District survey for communication needs/channels</p> <p>Develop action plan based on the survey results</p> <p>Conduct annual Town Hall meetings with Divisions</p> <p>Year 2: Conduct follow-up survey district wide</p> <p>Year 3-4 Continue to assess levels of improvement in communications. Implement action steps based on survey results.</p> <p>Year 5: Conduct survey 90% positive rating by end of year</p> |
| <p>Leadership Opportunity</p>                                    | <p>Strongly encourage leadership through team building</p>  | <p>Need Individual commitment with willingness to serve to clearly see the benefits of being a leader. (<u>Addendum- District 66 Guidance Committee</u>)</p>   |
| <p>Education Training</p>  | <p>Encourage educational training frequently enough for members and club officers to focus on education programs. Give all members the opportunity to be familiar with the program including leadership such as taking on meeting roles and club officer roles.</p> | <p>Encourage clubs to promote education and leadership with internal training to increase member participation.</p> <p>Establish Education Program Committee (EPC) chaired by VPE with support from committee members.</p> <p>Monitor member progress. (<u>Addendum - Member Education Section</u>).</p>   |



**Strategic Initiatives continued:**

| Themes   | Objectives   | Recommendations   |
|--|--|---|
| <p>Integrate technology into the member experience.</p> <p>Create Education resource centers</p> | <p>Create Education Program Committee (EPC)</p> <ul style="list-style-type: none"> <li>◆ Identify Technology/Social Media resource experts to assess channels and content</li> <li>◆ Create accessible education materials to all club members<br/>Create education library to house all learning materials with clouds.</li> <li>◆ With and assist using WLI and SLI (<i>Member Education Section</i>)</li> </ul> | <p>Year 1 Connect at TI Board to determine Club experience</p> <ul style="list-style-type: none"> <li>◆ Conduct assessment of Technology/Social Media content and channels</li> <li>◆ Years 1-2: Update website to current technology/update social media channels with content. Education library to house all learning materials on clouds</li> <li>◆ Years 3-5 Identify new social media channels</li> </ul> |
| <p>Enhance understanding of incentives to drive member success</p>                               | <ul style="list-style-type: none"> <li>◆ Develop or utilize an existing committee such as the proposed Leadership Committee to assess the incentive program</li> <li>◆ Encourage consistent mentorship program with realistic Personal Education Plan</li> </ul>   | <p>Year 1</p> <ul style="list-style-type: none"> <li>◆ The committee evaluates and puts together recommendations on how to more effectively utilize the incentive program.</li> <li>◆ Design member and Club incentive program with a designated group responsible for oversight of incentives.</li> <li>◆ Orient members/Clubs to incentive program along with the oversight of the program.</li> </ul>        |

## Strategic Initiatives continued:

| Themes  | Objectives   | Recommendations  |
|---|--|--|
|   | <p>(PEP) to monitor progress with awards and incentives</p>  | <p>Year 2-5</p> <ul style="list-style-type: none"> <li>♦ Monitor the member and Club's success and the impact on recruitment and retention. (<u>Addendum - District 66 Guidance Committee</u>)</li> </ul>  |
| <p>Position member personal development as an investment</p> <p>Member Satisfaction</p> | <p>Conduct member satisfaction Surveys across District.</p> <p>Increase member satisfaction and fulfillment.</p> <p>Create club atmosphere conducive to learning with fun-filled experience.</p> <p>(<u>Addendum - Member Education Section</u>)</p> | <p>Year 1: Conduct baseline District wide member satisfaction and thereafter every six months. Implement VPE personal development plan</p> <p>Develop/adjust action plan based on the results of the survey</p> <p>Conduct annual Town Hall meetings with Divisions.</p> <p>Implement District-wide New Member Orientations</p> <p>Year 2: Re-assess Conduct follow-up survey district wide member satisfaction survey</p> <p>Year 3-4: Continue to assess improvements based on District-wide member satisfaction surveys.</p> <p>Year 5: Re-assess Conduct survey - 90% positive rating by end of year</p> |

# Increase Awareness, Engagement, and Participation

**Desired Outcome:** Increase awareness of Toastmasters with community at large.

**Success Measures:** Club Growth: 3% growth in years 1-2, 5% growth in years 3-4, 8% growth in year 5

## Strategic Initiatives:

| Themes  | Objectives  | Recommendations   |
|---|---|---|
| <p>Integrated digital tools and training (social media, website, etc.) into marketing and educational strategy</p> <p>Create club brand</p> | <p>Years 1-5 +75% of Clubs actively participating in social media</p> <p>Establish District 66 knowledge</p>  | <p>Implement VPPR strategy (<u>Addendum - VPPR</u>).</p> <p>Establish District 66 knowledge: Create virtual library/toolkit, FAQs, Videos, best practices.</p> <p>Develop a suite of digital tools for marketing and educational strategy</p>   |
| <p>Develop and Implement a sustainability/succession plan</p>   | <ul style="list-style-type: none"> <li>♦ Develop/Implement succession planning at the Club and District levels</li> <li>♦ Develop/Implement high performance leadership program.</li> </ul> | <ul style="list-style-type: none"> <li>♦ Assess succession plans/strategies at the Club, Area, Division and District level.</li> <li>♦ Area reports of Club visits demonstrate an analysis of Club's succession plan.</li> <li>♦ Implement leadership orientation program.</li> <li>♦ Emphasize leadership opportunities at the club and District Level</li> <li>♦ See also: Leadership Development and Succession Plan</li> <li>♦ (<u>Addendum - District 66 Guidance Committee</u>).</li> </ul> |

**Strategic Initiatives continued:**

| Themes  | Objectives  | Recommendations  |
|---|---|--|
| <p>Embrace continuous improvement philosophy</p> <p>Maintain consistent "quality" of club's overall operation and programs in education</p> | <p>Years 1-2 Establish and evaluate District 66 knowledge base.</p> <p>Update District 66 knowledge base for marketing, TLI, Conference, District, etc. execution.</p> <p>Education and encourage clubs to actively participate in strategizing social media and online presence with tools and resources such as knowledge library and blog, district trainings and conferences</p> <p>Years 3-5 Reassess District 66 knowledge base</p> <p>Understand the essential of club success with structure and workable "system" in place</p> | <ul style="list-style-type: none"> <li>◆ Develop a continuous quality improvement resource team with representation from each Division lead by established leadership from i.e. past District Directors and other "seasoned" DTMs.</li> <li>◆ Integrate digital tools and training ( social media, website, etc.) into marketing and educational strategy</li> <li>◆ Promote club's quality services in education program i.e. quality communication and leadership well-structure programs.</li> <li>◆ (<u>Addendum - District 66 Guidance Committee</u>).</li> </ul> |

## Conclusion

“Envisioning and developing a strategic plan can be challenging. Toastmasters, like most organizations has more opportunities and needs than can be simultaneously addressed...What is often the more challenging part of the strategic process comes next: execution. Execution encompasses balancing and potentially adjusting priorities, project analysis and planning, resource acquisition and management, change and risk management, development of success metrics and finally, measuring milestones and outcomes.”<sup>1</sup>

The District 66 strategic plan is a living document and as such constant review and examination must take place to ensure a “pathway” to success for the District. The proposed District 66 Guidance Committee will assist the Trio in their efforts to implement the plan which is designed to be a plan whereby each year builds on the successes of the previous year. The plan is creative, practical, and ambitious but it is also manageable.

Lastly, Toastmasters District 66 must be adaptable and resilient in the face of a changing external environment. We must find the balance of developing new innovative and creative approaches to learning while at the same time we must foster a culture for members and leaders to thrive. Finding a balance will take time and resilience to achieve our desired outcome.

**“It is literally true that you can succeed best and quickest by helping others to succeed.”**

**~ Napoleon Hill**

<sup>1</sup> Toastmasters International Strategic Plan 2015

# A D D E N D A

# District 66 2020-2025 Strategic Plan Addendum Overview

## Overview

- In this addendum we propose a framework for three areas:
  - Strategic plan development and measurement
  - Member education
    - Member education methodology (chart)
- Essentials
  - Build from club level to District level - bottom up
  - Built on existing Toastmasters club and district structure - simplicity
  - Build support from all levels - club member to District Director

# 2020-2025 Strategic Plan Addendum – District 66 Guidance Committee

“The calendar is relentless.”

Al Tuten, past District 66 District Governor, Past Regional Advisor

District 66 Guidance Committee:

- Chaired by the immediate past District Director
  1. If the IPDD is not able to serve, then the Trio will appoint a knowledgeable and connected chair
  2. All past District Governors/Directors who are active members are invited to participate
  3. The Program Quality Director is invited to participate
- The committee is to guide the District 66 Trio as they lead our members today and into the future
- Initiatives
  1. Act as a guide to the Trio to cooperatively lead the district with the future in mind. Vision and mission are the fundamental guiding principles along with District 66 core values. District leadership continuity and operational resilience are key
  2. To work with the Trio to appoint an annual strategic planning committee
  3. To evaluate the effectiveness of the strategic plan and its application. To provide this evaluation to the strategic planning committee
  4. To direct a Leadership Development and Succession Planning model. See next page\*\*\*
  5. To advise in preparing the District Success Plan
  6. To hold a minimum of six meetings a year



Time line:

- 2020-2021
  1. Continue initiative two
  2. Begin initiatives one, three, four, and five
  3. Initiative three is detailed below. \*\*\*
  
- 2021-2025
  1. Continue initiatives one through five
  2. Fine tune the Trio relationship and document the methods used for future use

**\*\*\* Leadership Development and Succession Planning model details**

**Overview**

- Provide a method to ensure a successful District 66 future for every member

**Identify and recruit future leaders**

- Establish a committee to find and recruit new leadership for Toastmasters annually
- Develop a purposeful and organized method to build a strong leadership team that is needs driven, talent filled, and personally recruited
- Repeat recruitment several times during the year, especially just before a Toastmasters year ends
- Assist nomination committees to provide information about emerging leaders
- Include existing leadership plus a wide cross section of Toastmasters members in the planning efforts

# District 66 2020-2025 Strategic Plan Addendum – Member Education Overview

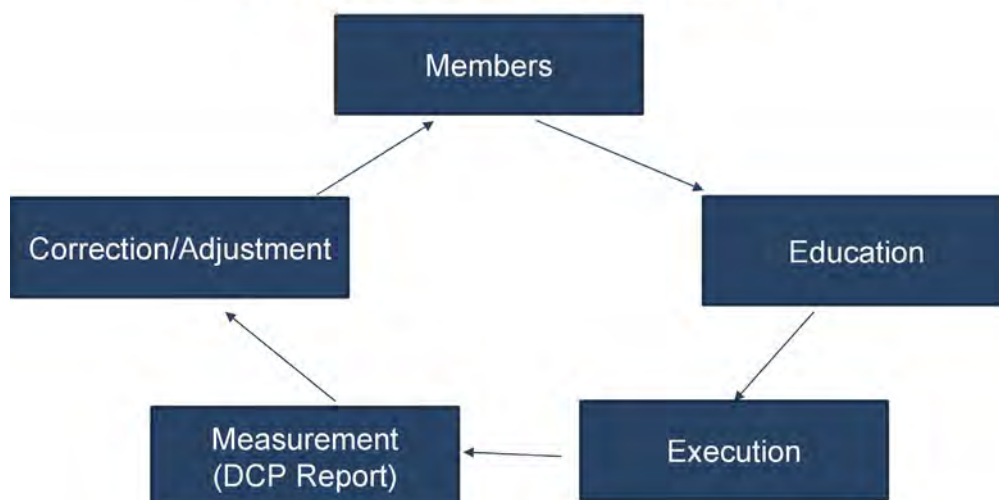
To establish a framework for membership and leadership development.

- Build the base from club level to District level - bottom up
- Built on existing Toastmasters club and district structure - simplicity
- Must have support from all levels – club member to District Director

# District 66 2020-2025 Strategic Plan Addendum – Member Education Methodology



## Methodology Chart



### Description of Methodology Chart

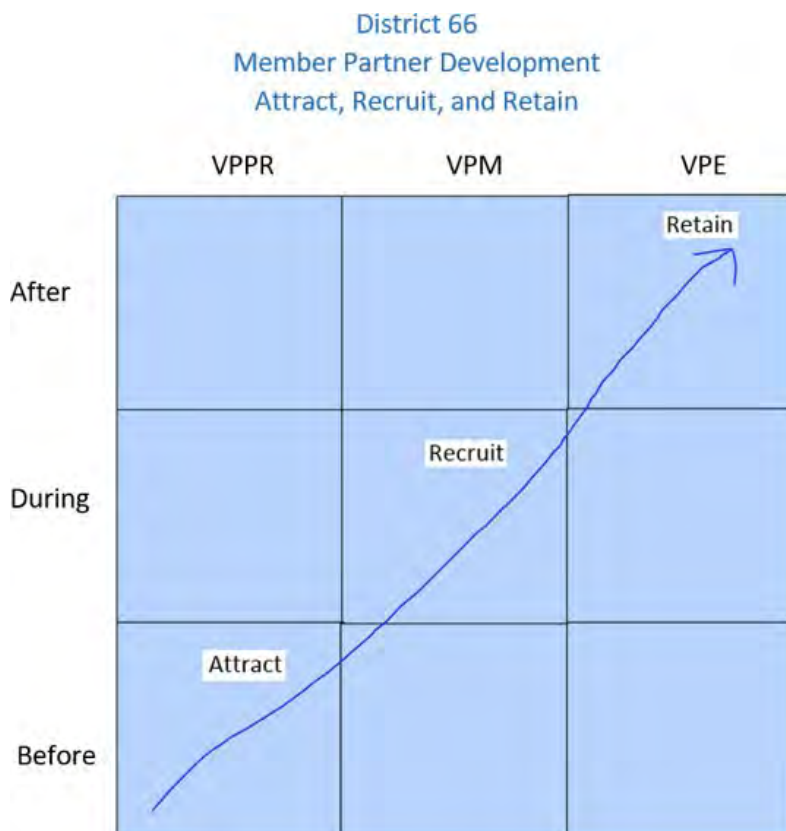
The objective of the Methodology Chart is to guide the process in a systematic manner methodologically. Our aim is to build the chart with circular approach simply because it entails the system components that linearly aligns with the members, education program, and the approaches involved in the process flow.

The first element that drives the initiation of the process is the members. The education element comes next as a must-have to allow members to develop the necessary skillset for successful achievement of the program. Subsequently, it is necessary to have the mechanism in place to allow the implementation of the education program that may drive the success for members. Likewise, the progression of success of the implementation can be monitored and tracked with reporting coupled with the measurable metrics for gauging the progress. The purpose of the correction or adjustment is to take any necessary steps for the purpose of improvement and enhancement of the education program. Such cycle would then start again with the members as the initial methodological process. The cycle will continuously and systematically progress through each element once again.

# District 66 2020-2025 Strategic Plan Addendum – Member Education Overview

## Membership development overview

- With a strong membership base that we make every effort to retain, we will gather strength over time. This increasing strength will allow us to begin in the second and succeeding years of our plan to train, mentor, and grow our leadership abilities. Indeed we will achieve our vision of “Where leaders are made.”
- Build from the base of the triangle – member and club first.
- Bottom up approach with support from area, division, and district leadership.
- To attract member partners who are truly committed to the Toastmasters pledge.
- Attract (VPPR), recruit (VPM), and retain (VPE) member partners rather than simply members.
- Align club evaluation expectations between club officers and area directors for a consistent understanding of how a successful club should operate.
- Authors:
  - VPPR – Kathy Reynolds
  - VPM – Robert Turcotte
  - VPE – Kathy Reynolds and Robert Turcotte



# VPPR

## Overview

- Provide appropriate training and guidance for use of marketing tools and resources such as the branding portal, social media, “elevator” speeches, to create interest in club that results in visitors
- Provide planning tools:
  - 1) A formula that based on club data, working backwards from required number of new members, determines numbers of guests, invitations, reach, and views required to meet goal.
    - Actual data for club is best; however, example uses historical data from Toastmasters
  - 2) Marketing Plan Template that allows VPPR to lay out the entire Toastmasters year including when to partner with VPM and VPE.

## Before the Meeting

- Determine number of new members needed to meet DCP.
- With VPM’s closing ratio and attrition data, Secretary’s attendance record and SAA’s guest register, calculate number of guests, invitations, reach and views to garner those members (see Formula)
- Develop, implement and manage a marketing program (see Tools & Avenues and Plan of Action with Milestones) based on target demographics, niche and persona (see Demographics, Niche and Persona).
- Monitor and respond to inquiries about visiting the meeting.
- Provide Guest Packets to SAA.

## During the Meeting

- Greet guest(s) and make introductions (See VPM Dance)
- Assist VPM with determining best fit for kindred spirit.
- Hand-off management of guest relationship to VPM.

## **After the Meeting**

- Circle back and repeat Before the Meeting to ensure a steady stream of potential members/guests.
- “Advertise” meetings and projects to members.
- Develop core and continue to train members in “elevator” speech(es) and other guest/potential guest communication.

# VPM

## Overview

- Recruit
- Provide an example of a great VPM procedure that club leadership can use to ensure that we qualify, and recruit committed partners

## During the Meeting

- “What brings you to our meeting?”
  - Listen and remember the reason – repeat in every introduction
- Introduce visitor to their kindred spirit
- President introduction from lectern - name, reason visitor is at the meeting, and a short introduction by the president or the visitor
- Tell visitor what to watch for in the meeting – prepared speeches, table topics, evaluations
  - Sit with visitor and guide through the meeting – kindred spirit?

## After the Meeting

- Reconnect with visitor – kindred spirit?
- “How did it go?” “Do you believe that Toastmasters can help you to strengthen (repeat their reason for visiting)”
- Meet the VPE – “I am here to make sure that you’re successful.”
- Treasurer – how to enroll.
  - Write a follow-up note, or call

## Before the Meeting

- Train and work with your club members
  - Especially VPPR and VPE
- Ready a visitor’s packet and visitors register
- Know that you have a visitor coming – name

# VPE

## Overview

- Retention
- Provide a method to ensure member success – not simply to fill the agenda with speakers

## After the Meeting

- Use the results of the previous meeting to determine how to best enrich and retain current members
- Meet with members, understand their why and determine how achieving their own goals will contribute to meeting the club goals established in the DCP
- Work with new members as well as struggling members to “assign” mentors/coaches
  - Mentor for longer term, broader guidance
  - Coach for overcoming an obstacle or dealing with a specific issue
- Check in with mentors on their thoughts about mentee progress shared during the last meeting, adjustment of goals
- Be accessible to members to discuss goals, obstacles, etc.

## Before the Meeting

- Based on your observations after recent meetings, plan programs based on the following:
  - Meet individual personal growth goals
  - Meet club success goals
  - Make it “Sellable” for marketing to guests
  - Make it “Enjoyable” to maintain member attendance
- Contact, advise, and mentor member partners to help them get the most from their membership
- Assist with creating a Club Success Plan, specifically education goals and program planning



## VPE

- With the help of the Secretary, VPPR and your web/social media, communicate the programs and confirm associated member responsibilities
- Provide President/Toastmaster education awards to recognize member achievement

### During the Meeting

- Observe member partners as they perform their roles
- Ask yourself, “How can I as VPE help this member achieve at a higher level?”
- Be enthusiastically involved in the meet and greet, give them a “focused VPE elevator speech” with customized details learned from the story shared by the guest
- During the business portion, report progress on DCP, relate it to specific member educational achievement, and confirm progress with member goals

### Before the Meeting

- Based on your observations after recent meetings, plan programs based on the following:
  - Meet individual personal growth goals
  - Meet club success goals
  - Make it “Sellable” for marketing to guests
  - Make it “Enjoyable” to maintain member attendance
- Contact, advise, and mentor member partners to help them get the most from their membership
- Assist with creating a Club Success Plan, specifically education goals and program planning
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# Reference

(Addendum - Overview)

(Addendum - Strategic Planning Steering Committee)

(Addendum - Member Education Overview)

(Addendum - Methodology Chart)

(Addendum - Member Education Section)

(Addendum - VPPR)

(Addendum - VPM)

(Addendum - VPE)