



# The Club Coach Playbook

**A Step~by~Step Guide Toward  
Achieving Success As A Club Coach**



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## ***The Club Coach Support Program... Welcome***

Congratulations, you have been assigned as a Club Coach to help a Club reach new levels of growth, vitality, and success. Your assignment is the first step of a journey that will challenge your leadership and communication skills in profound ways. At the end of your journey, you will have touched the lives of many people by helping them reach new goals and achieve new successes.

***Your mission is to empower Clubs with twelve or fewer members to achieve Distinguished Status within one Toastmasters' year. Successful completion of this mission will result in untold benefits to you, your team, and to the members of the Club(s) you guide to health and long-term growth.***

Providing the Club Coach with guidance, support, and the resources needed to successfully complete Club Coach assignment is the focus of this manual. In fact, this manual is but one component of an overall resource and support system developed by a dedicated team of Toastmasters with more than 125 collective years of experience in Business Consulting, Training, Executive Coaching, Education, and Behavioral Psychology. Under the direction of this team, the Club Coach Support Program continuously evolves and improves as we seek to achieve our primary goal... **YOUR SUCCESS!**

We want your experience as a Club Coach to be rewarding to you and the Club, thus, our support does not end with the training workshop you attended prior to your assignment or this manual you hold in your hands. We are dedicated to help you achieve success as a Club Coach, and when you accepted your mission as a Club Coach... we too accepted that mission.

The Club Coach Support & Development Team

***Richard S. Hockett and Bill Jacky***

## ***Introduction***

What is the Club Coach Support & Development Program? Where did it come from, and how does it augment the Club Coach Program? For that matter, what is the Club Coach Program? How do I help a Club be Distinguished? Is there any training or support in place for a Club Coach, or are we to follow our instincts? Will every Toastmaster be a successful Club Coach? Do these questions sound familiar? Toastmasters the world over are asking these questions of themselves, and others, as we venture onto the field as a Club Coach.

In short, the Club Coach Support & Development Program's mission is to help Club Coaches be the best Club Coach they can be, and to help – by providing training and support – the Club Coach achieve success in their endeavor. This manual is your guide – your ***Playbook*** - to success. It contains the information, many of the tools, and a list of resources that will help you help the Club return to health.

# ***What is the Club Coach Program?***

## ***The Club Coach Mission***

***The mission of the Club Coach is to guide Clubs through the process of effectively identifying and maximizing their strengths to realize their potential, and to provide the resources and the tools that enable and empower the Club to achieve its long term strategic goals of continuous growth.***

Most Toastmasters are familiar with the program that Club Coach replaced – the Club Specialist – yet there confusion persists regarding the Club Coach Program’s requirements, expectations, procedures, and processes.



The Club Coach Program is, foremost, an Organizational Development intervention into an organization that is failing. The purpose of

The Club Coach Program is truly about people helping people to become highly motivated, high performance teams. The Club Coach Program embraces the Mission of a Toastmasters’ Club by helping Clubs build a mutually supportive and positive environment.

this intervention is to guide the organization (i.e., the Club) through the process of taking responsibility and accountability for problem solving, strategic planning, and the design and implementation of a long-term growth action plan. The expected end result is a highly motivated high performance team. Simply speaking, the Club Coach program is designed to help Clubs attain long-term growth, health, and success by helping them help themselves.

The Club Coach Program places the responsibility and accountability for organizational health precisely where it belongs... on the Club itself! When implemented correctly, the Club Coach Program improves the inter-personal communication process within the Club and between Club members. The program fosters a mutually supportive learning environment through facilitated discussions that identify the strengths and opportunities a Club has, and the

development of an action plan that will turn weaknesses into strengths and eliminate threats to the Club's survival and prosperity. It helps Clubs understand what they are about and where they want to go. It is, as Terry Pearce states in his latest book... *Leading Out Loud*... (Pearce, 2003).

The key difference between the Club Specialist and the Club Coach Program is in the approach to problem solving. The Club Specialist was expected to get the Club to a membership count of twenty members within a twelve month period. However, the program did not assess, or address, the underlying behavioral problems within the Club that were cause for excessive member churn (i.e., turnover). Falling membership, or excessive member churn, is a symptom of underlying behavioral problems within the Club, and the Club Coach Program - properly implemented – helps the Club addresses these areas.

Another noteworthy advantage of the Club Coach program is the timeliness of the intervention. Rather than waiting for a Club to be in a death spiral with eight or less members, the intervention now takes place when the Club's membership levels reach twelve members. Since the primary identifier (i.e., the most visible symptom) of a Club at-risk is low membership, early identification of Clubs in need enables the Club Coach to interact with the Club at a much earlier phase in the process; thus, there is likely a higher level of moral – and hope.

## ***Advantages of the Club Coach Program:***

- ◆ Up to two (2) Coaches may be appointed to each Club
- ◆ A Club Coach ***may not*** be a current member of the Club upon assignment from the District Governor. In fact, we strenuously advocate that a Club Coach remain a non-member of the Club(s) being coached until their assignment is successfully concluded. This recommendation arises from the historically proven fact that when you join a Club you are coaching, you lose your objectivity; thus, your effectiveness as a coach is diminished. In other words, upon joining, you become part of the problem rather than helping the Club find workable solutions for themselves.
- ◆ The Club Coach assignment is a **short-term** assignment. Club Coach assignments last until the end of the current Toastmaster year (July 1<sup>st</sup> through June 30<sup>th</sup>) if distinguished status is achieved. Assignments last until the end of the subsequent Toastmaster year (July 1<sup>st</sup> through June 30<sup>th</sup>) if Distinguished Club Status was not obtained during the first year of the assignment. A request for an extension of the assignment must be submitted through the District and approved by Toastmasters International.
- ◆ ***Recognition*** factors of the Club Coach Program are appreciably different from those of the Club Specialist Program as well.
  - ☆ The Club Coach receives a ***Club Coach*** pin upon assignment as a Club Coach.
  - ☆ Toastmasters International strongly recommends that District, Division, and Area publicity and recognition is given to newly assigned Club Coaches. Club Coaches are, for all practical purposes, turnaround specialists and they deserve mention of their appointment and accomplishments in the exercise of these skills.
  - ☆ The Club Coach is granted credit toward their Advanced Leader Award upon the successful completion of their assignment.



- ☆ Club Coaches, with the approval of their Leadership Excellence Committee, can fulfill the High Performance Leadership (HPL) Project requirements toward achieving their Distinguished Toastmaster (DTM) designation if they use their Club Coach assignment as their HPL project.
- ☆ Upon the successful completion of their assignment, the Club Coach is presented with a Toastmasters International Certificate.

The Club Coach Program is designed for success... success of the Club Coach and of the Club. The program has built-in long-term benefits that affect the member, the Club, the Club Coach, and Toastmasters International. A few of these long-term benefits include:

- ☆ Learning how to develop highly motivated teams
- ☆ Learn how to conduct a strategic analysis, develop a workable strategic plan, and effectively execute the plan
- ☆ Learn to be an effective facilitator.
- ☆ Clubs will grow stronger and learn to achieve long-range growth.
- ☆ Learn how to help an organization define its personal vision, and to help that organization crystal it into a unified goal every member wants to achieve.
- ☆ Learn how to effectively motivate a non-profit organization to action through communication.
- ☆ Help Clubs reduce member churn and improve member retention rates.
- ☆ Clubs benefit from strong leadership skills, and the Club Coach will benefit as their leadership skills are strengthened and demonstrated.
- ☆ Fewer “lost” Clubs
- ☆ Increasing numbers of Distinguished Members, Clubs, Areas, Divisions, and Districts means growth in all areas.

## ***The Club Coach Support & Development Program: An Overview***

Early in the 2002-2003 Toastmasters year, a distinguished gentleman, and fellow Toastmaster from District 23, Bill Jacky, moved to Las Vegas, Nevada and promptly joined a Club (or two) in District 33. Bill brought to District 33 his High Performance Leadership Project: entitled ***F.A.S.T.*** ***F.A.S.T.*** was a proven methodology for turning low-performance Clubs into highly motivated, high performance organizations. In November 2002, Debra Ann Ristau, the District 33 Lieutenant Governor of Education and Training at the time, introduced Richard Hockett to Bill Jacky and asked if Richard could help Bill with his project. The rest, as they say, is history!

***F.A.S.T.*** (Facilitation and Support Team) was developed to help Club Specialists achieve higher success rates in a program where successes were few and far between. The concept of the original ***F.A.S.T.*** program, indeed, the present Club Coach Support & Development Program is simple: *provide the support and resources that Club Coaches (then, Club Specialists) need to successfully complete their assignment.* Help and ongoing support is provided to these committed individuals through interactive training in facilitation skills, organizational analysis skills, negotiation skills, developing and implementing action plans, and most important... teaching Clubs that it is the Club's responsibility for achieving long-term growth – not the Club Coach (Specialist).

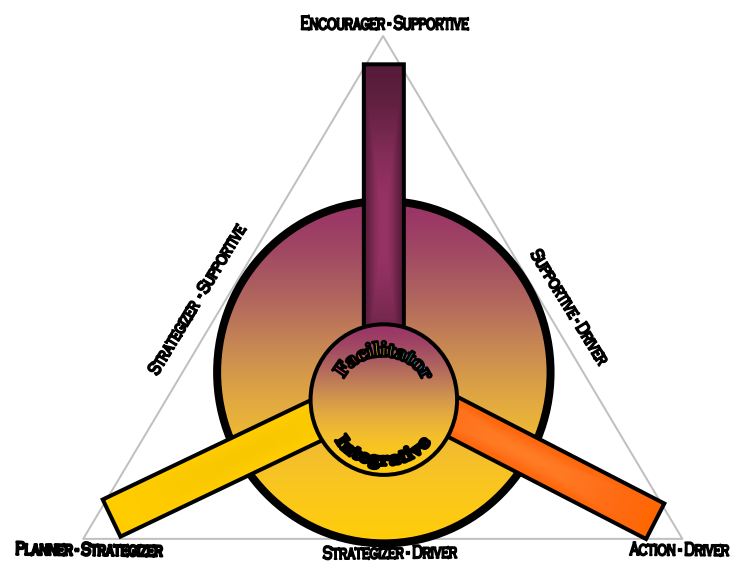
Every Club Bill worked with achieved their immediate goal of twenty or more members, and was positioned for continued growth. The majority of these Clubs had been staring the Grim Reaper in the eye sockets when Bill was assigned to work with them; in the end, 5 out of 6 Clubs had reached President's Distinguished Status within one year.

Why does the Club Coach Program work more effectively when complimented by the Club Coach Support & Development Program? The answer is that the two programs are

inseparable, as well as the fact that **F.A.S.T.** was built upon the solid foundation of Dr. Edward Deming's fourteen step plan to continuous improvement. With Richard's coaching (add a little prompting) and Bill Jacky's desire to continually improve the program, the Club Coach Support & Development Program has evolved to significantly enhance the Club Coach Program in the areas of organizational development and behavior, strategic analysis and planning, and braking down of organizational communication barriers.

The underlying communication and leadership model (*The Maximum Impact System*) that provides Club Coaches, Field Coordinators, Area Governors, Division Governors, and so forth, the ability to identify individual communication and leadership styles, and to effectively motivate behavioral changes in an organization, was developed by Richard S. Hockett, MBA, ATMG and Dr. Fred Elias. It is used here with permission. This model provides a 360o Feedback system enabling the Club Coach to help an at-risk Club uncover the source issues resulting in falling and/or high membership turnover, low performance levels, and low morale.

### ***The Maximum Impact System***



In August 2003, a team of professionals from the disciplines of Clinical Psychology & Neurolinguistics (Dr. Barbara Linde, DTM), Marketing and Organizational Behavior (Richard Hockett, MBA, ATMG), Educational Technology (Sue Bauer, D.Ed, DTM), and Education (Bill Jacky, MS, DTM; Cheryl Baker, BA: Education, DTM; and Marilynne Brothers, DTM) was pulled together to develop a training workshop that fulfilled the primary promise of the Club Coach Program: providing Club Coaches with levels of training and support that were sorely

needed – and usually absent – in the Club Specialist days. The product of this development team is a one-day, highly interactive training workshop at which prospective Club Coaches learn the skills of facilitation, strategic analysis, establishing a personalized vision and a mission for the Club, and how to design, implement, and measure the performance of an action plan. The workshop is comprehensive in scope and a requirement for all Toastmasters wishing to be assigned as a Club Coach.



Program author, Bill Jacky (right) explains the newest addition to the training & development program to trainers John, (left), Jo Ellyn (center), and Vicki (next to Bill)

Moreover, the Club Coach Support & Development Team has established a support network of trainers, staff, and resources that any Club Coach in Toastmasters International can pull from. The development team believes the Club Coach Support & Development Program enhances the Toastmasters International program because, “...it

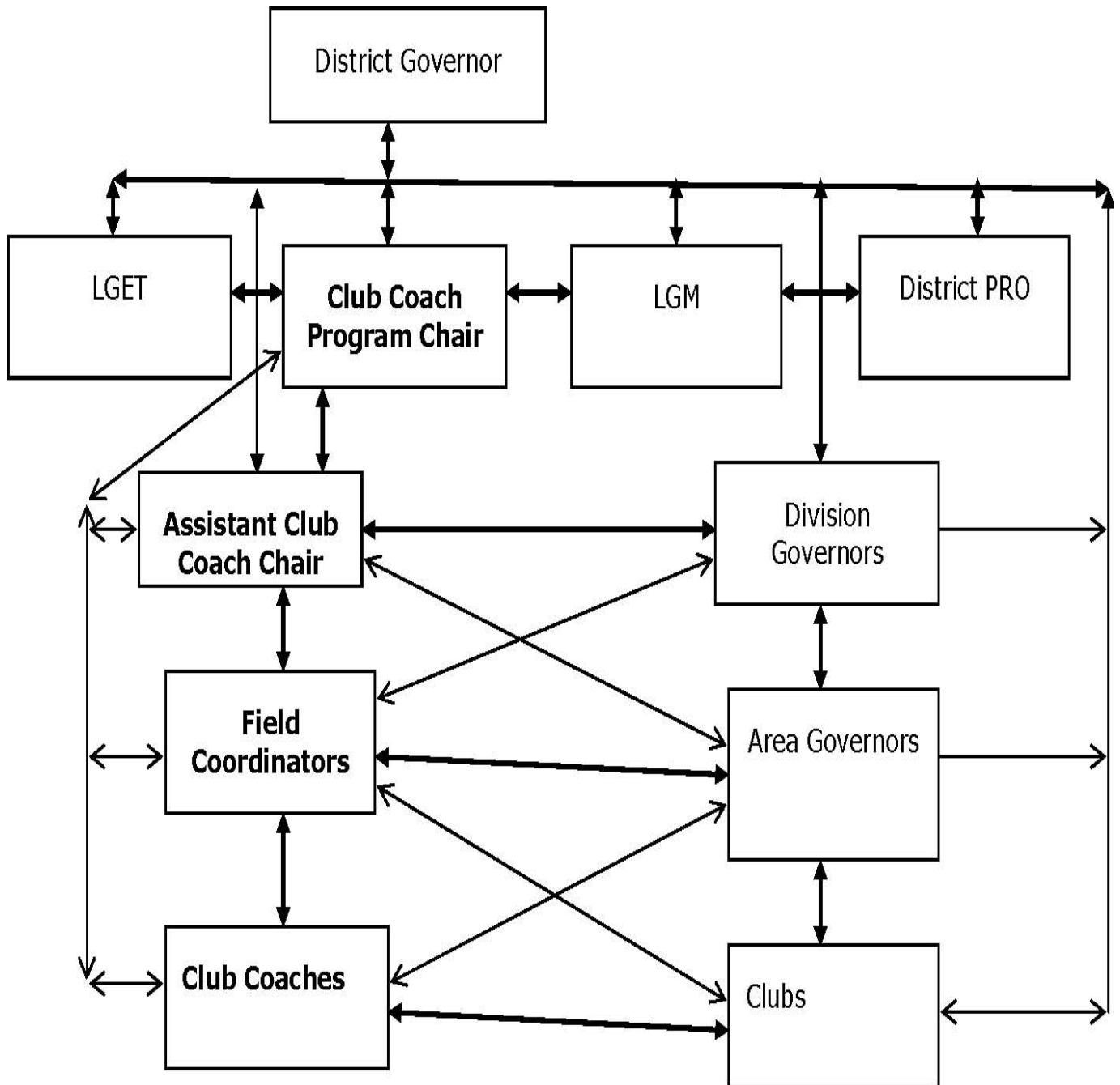
provides several layers of training and support for the Club Coach in the field that enables the Club Coach to empower the Club to meet new goals and achieve higher levels of success.” The support team is a resource for the Club Coach to draw upon when and if the need arises. This team is “mission-critical” in helping the Club Coach successfully fulfill their assignment and receive credit toward their Advanced Leader (AL) certification.

The Club Coach Support & Development Team developed, and is presently implementing in Districts throughout Toastmasters International, a well trained support network that utilizes the Toastmasters International organizational structure to great

effectiveness. Like the Club Coach Program, this is an ongoing and an evolutionary process; moreover, the response and adoption of the Support & Development Program is outstanding. By year-end, the program is expected to be wholly implemented and fully operational.

## **The Club Coach Support Program: The Organizational Overview**

Every organization has an organizational framework it relies upon to facilitate decision making, organizational communications, and to keep some semblance or order for the flow of information. We have included an “organization chart and organizational communication chart” as an example of how a Toastmasters International District might structure the Club Coach and Club Coach Support & Development Program. This chart is only a guide: adapt and adopt an organizational structure that best fits the needs of the District, its Club Coaches, and most important... its members.



Arrows represent suggested, effective information flows throughout the District and are not all inclusive.

Field Coordinator acts as Assistant to Division Governor, Supporting Area Governors and Clubs, obtaining District Resources to assist the Clubs.

Area Governors play a pivotal role in the Club Coach Support & Development Teams' strategic game plan. Area Governors are the "Scout" that identifies an "at-risk" Toastmasters Club in need of a Club Coach. It is the Area Governor's responsibility to give their team captain (the Division Governor) the scouting report in order for the game to begin. Once aware

of the need for a Club Coach to enter the game, contact is made with the assigned “***Coach Coordinator***” for the Division. The ***Coach Coordinators***, teaming with the Division and Area Governors, and the Club Coach Chair (each District may have a different title for this chair, and we leave it up to the District’s discretion of what title to assign), will help coordinate the training and placement of a Club Coach with a Club. Moreover, the ***Coach Coordinator*** is tasked with recruiting new Club Coaches, Coach Trainers, and in ensuring that trainers, themselves, and coaches have been trained.

Critical to the success of the Club Coach Program, and adamantly enforced by Bill, Richard, and all involved in the program is, “... ***no Club Coach will be placed before they are trained.***” Divisions and Areas can expedite the training process by providing resource materials to Field Coordinators and Toastmasters interested in becoming – or already assigned - Club Coaches. The diagnostic and training tools utilized by the Club Coach Support and Development Team trainers can be found on the Toastmasters International website (<http://www.toastmasters.org>). The team strongly recommends that all Clubs purchase, the members read and become familiar with, and Clubs regularly utilize the following Toastmaster International publications and tools:

- ☆ ***The Moments of Truth*** module from the Successful Club Series
- ☆ ***How to Rebuild a Toastmasters Club***
- ☆ ***How To Be A Distinguished Club***
- ☆ ***The Distinguished Club Plan*** (This tool is mission critical!)
- ☆ Additional Club Coach Support & Development Information can be found at <http://clubcoach.freesevers.com> and on the District 33 Website at <http://www.d33goldensage.com>.

## ***What is a Club Coach?***

The questions most likely going through your mind at this point are, “What is a Club Coach?

What is the Club Coach expected to do? How do I successfully accomplish my assignment as a Club Coach?

First things first: What is a Coach in general, and a Club Coach in particular? The fact is that a Club Coach may appear to be many things: “...*a counselor, a facilitator, a strategic consultant, and a mentor all wrapped into one; for at one time or another, a Club Coach may end up being each of these...*” (Hockett, 2003). An excellent description (paraphrased) of what a coach is comes from Dr. Edward Dreyfus (2003).

“Coaching is related to consulting. However, in coaching, the coach not only helps the client develop a plan of action to achieve a desired set of goals, the coach also stays with the client to help implement the changes and goals. A coach will help you explore options... [they] will assist you in discovering alternatives that fit your agenda, rather than tell what to do. A coach will **empower you** to find the answers to your questions and develop a strategy for your life [business, or organization] that is consistent with your values and beliefs. Generally speaking, coaching goes beyond consulting to incorporate all areas of your life [this applies to your organizational life as well] rather than the narrower focus commonly found in consulting.”

Dr. Dreyfus sums up the responsibilities of a coach (and this truly applies to Club Coaches) by describing what coaches focus on:

- ☆ Helping people set better goals.
- ☆ Asking their clients (i.e., the Club) to do more than they would on their own.
- ☆ Helping their clients to focus better so as to produce results more quickly.
- ☆ Providing clients with the tools, support, and structure to accomplish more.

Club Coaches focus on these same areas in order to coach the Club to achieve continuous growth. The Club Coach Support and Development Team helps the Club Coach locate and provide the tools, support, and structure to the Club in order that the Club is empowered to achieve Distinguished Club Status time and again.

How does coaching work? Dr. Dreyfus’s description is an excellent guideline that



applies to the Club Coach Program. He suggests that, “...coaching works best when there are regular appointments. In order to maintain focus and honor commitments, continuity is necessary. However, coaching is not limited to face-to-face meetings. In fact, most coaching takes place over the telephone. Coaching is not limited to geographical location, and one can be coached from any location. Coaching sessions are usually thirty minutes in length with three or four sessions scheduled per month.” In the training workshop, Club Coaches will find that we suggest 30 minute sessions with the Club as well as one or two thirty minute sessions with the Executive Committee.

“What is the Club Coach expected to do? How do I successfully accomplish my assignment as a Club Coach? As a Club Coach, you are a ***Facilitator - not a director*** – and it is understood you will not be able to change the Club culture. A coach helps individuals and organizations move forward into new areas of growth. Coaches are focused on the present and the future (Dreyfus, 2003). Only the Club’s members can change the culture and climate of the Club. On the other hand, the Club Coach ***can*** influence change and guide the change in a positive direction.

As a Club Coach, your task is to help the Club discover the root causes for their present status, and to help them understand that they need to take ownership of the process. Furthermore, the Club must embrace and implement the actions required to accomplish change if they are to achieve enduring growth and success.

As a Club Coach, it is expected that you will lend support to the Club and its officers by providing the tools, education, information, and guidance in their endeavor to complete the Distinguished Club Plan (DCP). In fact, the DCP becomes the metric against which the Club measures its performance: as does Toastmasters International. Using the DCP as a traveler

does a compass, guide the Club through the rocky shoals of new growth toward the port of Distinguished Club Status.

Under your guidance, help the Club learn how to hold high-energy professional and productive meetings. Teach the Club how to build a strong membership base, and how to continuously recruit new members into the organization. This will, in most cases, require behavioral changes within the Club; therefore, encourage the Club to deal with these issues by adding performance metrics into the strategic plan. Teach the Club how to sponsor Club Membership Building Campaigns, or Contests, that are allied with Toastmasters International's membership building programs: such as the Smedley Award Club Building Program. For example, this membership building contest is the perfect kick off for achieving the DCP objective of a net-growth of five members.

## ***The Club Coach as a Facilitator***

Foremost, a Club Coach is a facilitator. Some of the key characteristics and attributes of an effective facilitator are listed below. In their entirety, these characteristics describe the model or idea facilitator. It is not expected that each Club Coach – any facilitator, for that matter - possess all of these qualities. However, many are crucial to the success of a facilitator.

1. High degree of self-confidence
2. Understanding of, and commitment to, the client's need to undergo cultural change in order to remain competitive (or operational)
3. Low ego needs – takes support role rather than the “limelight”
4. Focused on the needs/expectations of the client (internal and external)
5. Assertive – not pushy, aggressive or offensive
6. Enthusiastic – energetic self-starter
7. Achievement orientation – keeps teams moving toward results
8. Willing to take well-conceived risks
9. Understanding of and commitment to the client's improvement initiative(s)
10. Pride in the client (Club)
11. Active listener
12. Above average verbal communication and presentation skills
13. Positive attitude
14. Able to establish rapport with all types of individuals
15. Able to coach team members through difficult tasks
16. Charismatic – able to inspire other, create a sense of urgency
17. Able to observe and provide feedback about group behaviors

18. Interpersonal competence
19. Political savvy and diplomacy
20. Well organized
21. Flexible and adaptable –possess a high tolerance for ambiguity
22. Able to forgo instant gratification
23. Enjoys variety in his/her “job”
24. Desire to see the client’s market share (member base) and earnings improve
25. Ability to model behaviors consistent with member involvement.

### ***The Ideal Facilitator: A Summary:***

An effective facilitator/integrator is an individual with diplomatic skills, one who is organized, understanding, and achievement oriented. The facilitator is sociable and well liked. They are flexible and appreciates being known as an individual that can adapt readily to different challenges and situations. The facilitator Wears many hats simultaneously and is open and responsive to the needs and wants of others. Experiments with different ways to respond and act with the group. An effective facilitator actively encourages others to participate and provides recognition for contributions and accomplishments. Additionally, the effective facilitator is an energetic coordinator who offers facts, opinions, ideas, and relevant information to further discussion and decision making.

The effective facilitator works best in an environment that is sociable and democratic; flexible, yet still structured enough to provide necessary challenges, resources, and recognition for both individual and group contributions and accomplishments. The organizational culture and climate (the organization’s environment) encourages personal interaction through coaching, goal setting procedures and processes, and team building initiatives.

## ***Mentor versus Facilitator***

While facilitation is similar to mentoring in several ways, the differences are significant.

### ***Similarities:***

1. You are an implied role model.
2. You are viewed as the expert, and, in fact, relied on for your expertise.

### ***Differences:***

1. You are NOT the leader, but a team builder and process expert.
2. You must deal with group dynamics and conflict.
3. Although you may BE the expert, you should generally AVOID playing the expert role by offering “silver bullets.”

## ***A Facilitator's Goals***

1. Design and model an efficient process for a group to accomplish its work.
2. Help a group learn how to identify when they are acting inconsistently.
3. Help the group develop processes that lead to effective Club operations and problem solving.

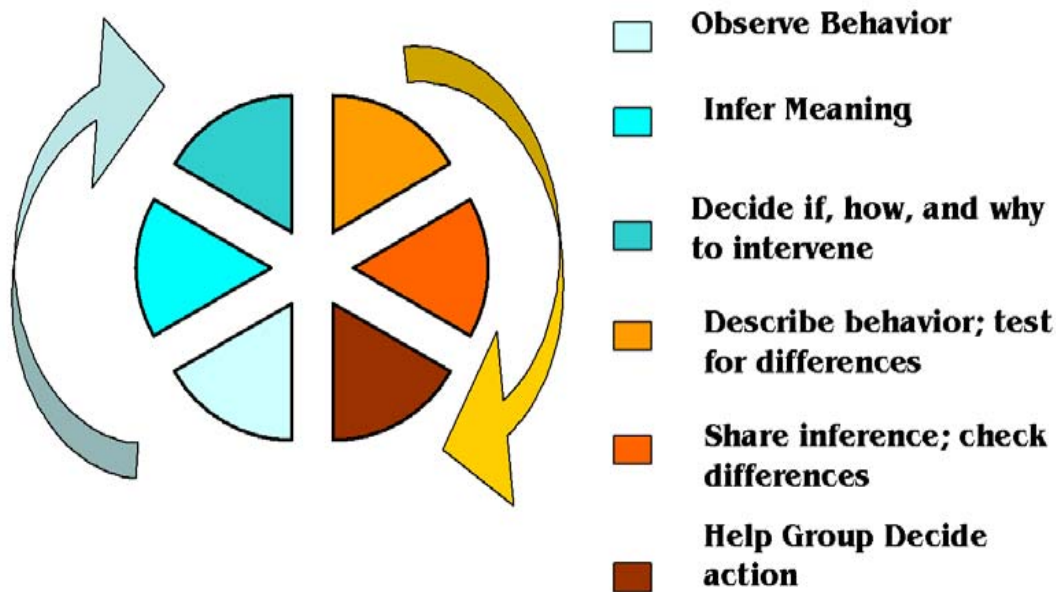
## ***The Role of a Facilitator***

- ☆ The role of a facilitator is to ensure that healthy team (Club) functioning by managing the group dynamics and progress toward resolution of quality (e.g., meetings, educational programming, structure, etc.) and productivity (e.g., membership growth, DCP goal achievement, CTM, ATM, etc.) related problems.
- ☆ When necessary, the facilitator regains team member's focus on the task of discovering the root causes of specifically defined problems.
- ☆ Serving as a guide, the facilitator assists a team in working through each step of a structured problem-solving process.
- ☆ It is also the function of the facilitator to coach team members who do not contribute appropriately during team meetings.
- ☆ The facilitator should strive to reduce the team's dependence on him/herself and assist the team in becoming self-facilitating.
- ☆ Members of management (e.g., District Officers, Field Coordinators, Area Governors, etc.) who serve as facilitators have the additional responsibility of encouraging team members to challenge the status quo, and search for ways to improve.
- ☆ Members of management (i.e., the Club's officers, District Officers, Field Coordinators, Club Coach Support Staff, etc.) must also enable team members to act more autonomously by increasing their competence, using techniques of coaching and empowerment.

## ***Measuring Success***

The Club is positioned for long-term growth. They hold quality meetings that capture the interests of the members and meet the wants of the membership. There is solidity of structure, yet the format is flexible enough to flow with necessary changes. Team members work together to build the Club and tasks are shared. The Club's climate is warm, inviting, and welcoming to members and guests alike. The Club consistently builds its membership base by turning guests into members, and involves new members in the Toastmasters International program within 2 meetings. The Club actively pursues the objectives and goals established by the Distinguished Club Plan (DCP), meeting 5 out of 10 goals on a consistent basis. The Club Coach has successfully completed their assignment when the Club achieves Distinguished Status.

## *The Schwarz<sup>1</sup> Diagnosis/Intervention Model*



- ◆ Observe Behavior.
- ◆ Infer meaning. Is response focused, following logical steps in the progression of problem resolution?
- ◆ Decide if intervention necessary.
- ◆ Decide how to intervene.
  - $\frac{3}{4}$  Rule: Intervene if:  $\frac{3}{4}$  of the Ground Rule is Broken:
    - Information being withheld. (All items open)
    - Comments off subject matter (stay focused)
    - Assumptions are implied but not stated (Require to know the WHY)
    - Failure to explain reasoning (Need to know the WHY)
- ◆ Personal attacks (Stay focused and objective)
- ◆ A subject matter is not being discussed (group think, non-discussable issue?)
- ◆ Side taking (Stick to the issues, or compromise)
- ◆ Debates on definitions, examples (review goals, meanings, levels of acceptance)
  - $\frac{3}{4}$  Ground Rules Broken (cont.):
    - Incessant talk (Limit discussion – all to speak)
    - $\frac{3}{4}$  Discussion contrary to Core Values of TI or your role.
    - $\frac{3}{4}$  Discussion stalemated. Not moving forward (Redirect, defer decision, ...)
- ◆ Describe observation, test for different views.
- ◆ Share inference; verify if your conclusion is correct.
- ◆ Ask others to share their inferences.
  - Here you express your observation (step 1), ask if your observation correct.
  - (If you decide to do so) You repeat your inference (step 2) and ask for concurrence.
  - (If you decide to do so) You Help group make appropriate response.
- ◆ The facilitator may decide to terminate the process at steps 2-6, based on the response.

## **Summary**

Facilitation is a process of improving group effectiveness in improving processes and structures. It is primarily directed toward problem solving and conflict resolution. A Club Coach is a facilitator is not a decision maker or problem solver, but instead ensures a logical, consistent process is followed by the group in attaining goals consistent with Toastmasters International and the Distinguished Club Program (DCP).

## ***Master Facilitator Certification Competencies*** ***Bring PACE to every engagement:***

1. Presence:
  - A. Projects confidence in own skills and own ability to lead the group.
  - B. Demonstrates warmth and caring.
  - C. Understands the impact of energy on participants and expresses in an energetic style appropriate for the audience and the session topic.
  - D. Makes adjustments in own style and language to adjust to the group.
  - E. Demonstrates awareness of own strengths and weaknesses.
2. Assessment:
  - A. Asks the questions to assess a client need and gains agreement with the client on the relevant scope and products.
  - B. Plans and prepares for the session effectively and collaboratively, including learning about the participants.
  - C. D develops customized processes to meet the specific requirements of clients.
  - D. Recognizes when a planned process is not working effectively and is able to diagnose the cause.
  - E. Demonstrates the ability to define alternative processes to reach desired outcomes.
  - F. Evaluates experiences, identifies learning and applies learning to new situations.
3. Communication:
  - A. Listens effectively, making sure to playback and confirm important points.
  - B. Demonstrates the ability to process information quickly and is able to differentiate content issues (e.g., outcomes from strategies).



- C. Isolates critical points in a discussion and creates potential bridges for agreement.
- D. Asks appropriate starting questions that effectively help groups to engage.
- E. Asks appropriate follow-up questions that clarify, probe and redirect.
- F. Delivers instructions that are accurate, clear and concise.
- G. Effectively identifies and verbally summarizes agreements.

**4. Control**

- A. Creates and maintains a productive environment in which participants engage in interactions that stay focused on achieving the goal.
- B. Creates and maintains a safe environment for people to speak openly without fear of retribution.
- C. Creates and maintains an environment that takes into account and fosters respect for diverse cultures and styles.
- D. Maintains an appropriate pace and manages the group's time during the session.
- E. Understands types of disagreement and demonstrates techniques for effectively guiding a group through conflict.
- F. Understands different types of dysfunctional behavior and consciously takes action to prevent, detect and resolve dysfunctional behavior.

**5. Consistency:**

- A. Understands and consistently applies best practice techniques for starting the session.
- B. Understands and consistently applies best practice techniques for focusing and controlling the group.
- C. Understands and consistently applies best practice techniques for recording information.
- D. Understands and consistently applies best practice techniques for closing the session.

**6. Engagement:**

- A. Knows and uses multiple techniques and tools for keeping a group engaged in the work and interacting and uses these techniques as needed.
- B. Knows and uses multiple techniques and tools for problem solving and decision-making and uses these techniques as needed.
- C. Knows and uses multiple techniques and tools for promoting creativity and uses these techniques as needed.
- D. Knows and uses multiple techniques and tools for raising energy and utilizes these techniques as needed

## ***The Club Coach Strategic Process: Analysis to Action***

1. Initial “needs analysis” (first meeting, usually unofficial) by the prospective Club Coach.

Coach visits the Club and observes the meeting (or lack thereof) and makes notes for later discussion with the co-Coach or with one of us. This meeting and needs analysis is simply a “grounding” exercise for the Club Coach so that they (he/she) has an idea of some of the behavioral and other issues that might be encountered throughout the rest of the process.

Furthermore, this initial analysis is used to help the prospective Club Coach make a decision if it is a good match between themselves and the Club. The analysis can include private notes for later review and/or conversations with Club members; in other words, whatever it takes to make a “do now or process further” decision.

2. The 1st official visit as a Club Coach (after training, and being assigned by the District Governor) now moves the Club Coach into the realm of the consultant, counselor, guide, and effective communicator. Prior to this meeting, the Coach needs to be in contact with the Club’s Officer’s to help them understand what is about to happen, and to schedule time to address the Club in its entirety at the next meeting. This is important to establish the communication pipeline and to begin the communication process regarding the Coaching Program and Process.

- a. The Club Coach will hopefully be granted 10 to 15 minutes to address the Club. A Club with 12 people in the Club, the chances are – and it is historically proven – that only 5 or 6 members attend meetings; thus, there should be no problem in scheduling speaking time.
- b. Use the allotted time to “introduce” the Club to the Club Coach Program, tell them what is expected of them, of the Club Coach, and tell briefly tell them the process: the next step is....!
- c. Hand out the questionnaire(s) to all members. Remember, the Officers of the Club

receive 2 sets with the instructions that they are to look at the Club from the viewpoint of Executive Officers (and their own performance in that role) as well as from the viewpoint of the “regular” member. Request that all forms be anomalously completed and brought to the next meeting. The only identifier to be found on the forms is that one set (7 officers) will have EXO written (or printed) in the upper left corner of the form. No names, just the designation. These forms will be handed to the Club Coach at the next meeting.

- d. At the conclusion of the Club Coach’s presentation, the Club Coach requests a 30 minute time slot for the next meeting to begin the coaching process that will help he Club return to health – as long as the Club truly desires to return to this state – and requests that everyone put on their thinking caps and try to identify & write down 5 to 10 Strengths and 5 to 10 Weaknesses they feel the Club demonstrates. (I recommend that they use a simplified “Moments of Truth” checklist to jog the memory, and that can be passed out by the Club Coach.) Following this step will make the next meeting be more effective and time efficient.

### 3. The 2nd Official Meeting:

- a. The Club Coach collects the forms from the members and the Club’s Executive Officer Corp. These forms are taken home by the Club Coach for review and will be returned to the Club at the next meeting.
- b. Begin the discussion of strengths and weaknesses (use white board or flip chart to write on) of the Club. The Coach does not collect anything from the members other than the analysis forms discussed earlier, and is now acting as a facilitator and guide to help the Club identify as an entity what strengths they possess and what weaknesses might be hindering their growth and success. This session will set the stage for the 3rd meeting when Opportunities and Threats are discussed.

- c. Following the discussion of the Club's Strengths and Weaknesses, close on a positive note and congratulate the Club members for their honesty, and their desire to be a vibrantly, vital, and vigorously successful Club. Also, set the next meeting time allocation (again 30 minutes) for discussion on Opportunities and Threats. Request that the members again "put on their individual thinking caps" and see if they can identify 5 to 10 opportunities that support or cause Club growth and success, and 5 to 10 Threats to their very survival. Note: It will be necessary for the Club Coach to "explain" – most likely through example – what opportunities and threats are.

#### 4. The 3rd Official Meeting:

This meeting runs similar to the last meeting. At the conclusion of the Opportunities and Threats discussion, bring the Strengths and Weaknesses back to the table and do a brief review of the entire picture. The end result of this exercise is to identify where we do things well, if we rely too heavily and for too long on those things we do well, what our weaknesses and threats are so we can develop specific action plans to eliminate threats and turn weaknesses into strengths so we as a Club can capitalize on the opportunities we have identified. This will take about 5 to 10 minutes to wrap up after the initial discussion, so I would recommend that 30 to 45 minutes be allocated for this particular meeting. Regardless, this will be dependent on meeting times, personnel, and the Club's willingness to discuss the matter. After the discussion and review, set the next meeting's time parameters so that the Club Coach and help the Club walk through the Vision and Mission phase (something that is specific for the Club), and begin developing the Action Plan needed.

Remember, the Club is to do the above - not the Coach! The Coach only guides and facilitates the discussion and the meeting. This is approximately meeting 4 as the Club Coach.

The vision and mission statements should be personalized for the Club, otherwise there is no “ownership” by the Club, and there is no reason to develop and implement an action plan. DO NOT SKIP THE ESTABLISHMENT OF A VISION AND MISSION STATEMENT SPECIFIC TO THE CLUB!

The action plan comes from the Mission Statement and is very specific in its objectives and performance metrics. This step may take more than one meeting and is sure to be highly interactive. Club Coaches will have to be on their toes for this stage and their facilitation skills will be tested. Coaches must be aware of individual behaviors within the group and highly vigilant for members that wish to have their will become the “law” over the true wishes of the group. This may even call for the Coach to end the session and begin fresh at the next meeting. The goal is to continuously keep the Club moving forward with small accomplishments throughout the process, and these accomplishments should always be recognized and praised by the Club Coach.

When setting the Action Plan, the Club Coach should be using the DCP as their guideline for objectives and help the Club establish performance parameters (deadlines) to achieve the objectives that will lead them to Distinguished Status. Some of the performance are established by WHQ and are not subject to change, while others are completely under the control of the Club.

Once the Action Plan is completed, it must be implemented – hence the word ACTION! – Or it is of no use. Once implemented, the plan is subject to periodic review (Club establishes these parameters when they develop the Action Plan), change, and continued implementation.

Note: Please remember that we are dealing with individual behaviors here.

Continuous membership growth and development is the foundation upon which the organization builds, and if no one is willing to talk to people “on the street” and

invite them to meetings... the Club Coach needs to get the members talking and find out the real reason as to why! For example, it has been my experience that when Clubs cease to build membership it is because the members have – for one reason or another – lost their belief in the ability of the Club to meet their needs. Because of this, existing members either stop coming to the meetings, drop out of TM altogether, or at the very least refuse to invite new people in because they are “embarrassed” to do so. In short, they have lost faith in their Club to fulfill its mission to the members and rather than complain or address the situation the members silently – and more often than not, slowly – kill the Club.

## ***The SWOT Analysis***

The best scenario is to do all of this in one meeting. However, based on the individual Club circumstances, you can either present this as a whole Club presentation or in two meetings, one with only officers and another with members and officers. Another option is to break this information into two meetings, i.e. cover strengths and weaknesses and the next cover opportunities and threats.

**Objective:** Getting the Club to take ownership of the challenges they face and guide them toward setting attainable goals and objectives. The SWOT analysis is the first step in the strategic process.

- A. What is your ultimate dream? (Club vision)
- B. What is your business? (The answer to this question is the foundation for the Club's personal mission statement.)
- C. Identify Strengths, Weaknesses, Opportunities and Threats.

### **Example:**

#### **Strengths (internal):**

Quality meetings                      Motivated, Participatory Members                      Strong Educational program                      Effective Mentoring program

#### **Weaknesses (internal):**

Untrained Leadership                      Lack of participation inside and outside of the meeting  
Cliques                      Membership burn out/apathy                      Low Membership Retention Rates

#### **Opportunities (external):**

Time and place                      Switch from closed Club to open Club                      Switch from advanced Club to regular Club  
Penetrate new market                      Broaden the membership base

#### **Threats (external):**

No new members in x amount of time                      High membership turn over                      Membership burnout  
Business goes out of business

## ***After the SWOT:***

### **Review:**

The Vision

- A. Why they are here.
- B. Identify Strengths, Weaknesses, Opportunities, Threats

### **Planning:**

- A. Vision (destination)
- B. Mission (pre-planning)
- C. Attract new members
- D. Meet in atmosphere that promotes long term learning and transferable job skills

### **Addressing Challenges:**

Proposed method of resolution

### **Present DCP and Successful Club Model:**

Easy goals of the DCP to accomplish are:

1. Officers trained
2. Paperwork – dues and officer lists
3. 4 members plus 1 (net growth of 5)
4. 2 CTM's
5. 2 CL's The Club, if they follow the DCP and work at changing the Club culture to attain these goals, have now accomplished 5 out of the 10 Distinguished Club Program objectives and are now a distinguished Club. If the Club has achieved this goal within the Toastmaster Year you were assigned as the Club Coach, well... technically your job is successfully completed. We recommend that you stay in touch with the Club for a few more months and continue to guide them to the next level of success – Select Distinguished!



**Examples of Mid-Range Goal(s):**

- . •Members – net growth of 5
- . •Every speech a manual speech]
- . •Everyone find a guest within the next two meetings

**Prioritize the objectives when writing the action plan:**

Example: Priority #1

- . •Objectives:
- . •Advertise in the paper every week beginning by (date).
- . •Conduct fun meetings
- . •Membership campaign/drive (set up awards) Starting next meeting until 9/30 (Smedley Award)

Speechcraft Coach may need to tap District resources. At next meeting, evaluate results, and talk to folks who were unable or unwilling to bring new guest, get their duty done, etc. to discover underlying reasons why they were unable to complete their assignment.

## ***SWOT Analysis Grid: Facilitated Exercise***

Each group is to imagine that they are working with a Club as a newly assigned Club Coach. When completing this exercise, help the members of “Club” you are working with to identify some of the strengths, the weaknesses, opportunities and threats they face. Walking the Club through this exercise begins to build communication bridges and helps the Club take ownership for the problems and the solutions.

<b>Strengths</b>	<b>Weaknesses</b>
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
<b>Opportunities</b>	<b>Threats</b>
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.

## Club Coach Troubleshooting Guide

1.	Members sincerely want their Club to be successful.	5 4 3 2 1	Members don't seem to care whether their Club succeeds or fails.
2.	Members are willing to work together to solve the Club's problems.	5 4 3 2 1	Personality conflicts and bickering are barriers to problem solving.
3.	Members are enthusiastic about Toastmasters and their Club.	5 4 3 2 1	Members have a negative attitude about Toastmasters and their Club.
4.	The Club's meeting place is convenient and offers a good environment for meetings.	5 4 3 2 1	Membership growth is hampered by an inconvenient or inadequate meeting facility.
5.	Meetings begin and end on time.	5 4 3 2 1	Meetings often begin late and/or run over time.
6.	Meetings are fun and Club programs are varied and dynamic.	5 4 3 2 1	Meetings are dull, lacking in variety and enjoyment.
7.	The key participants at each meeting are prepared and phone participants in advance.	5 4 3 2 1	Participants usually "wing it." Speakers and evaluators are never contacted in advance.
8.	All members are expected to speak from manuals.	5 4 3 2 1	Members frequently present non-manual speeches.
9.	Speakers are well prepared and deliver each speech to the best of their ability.	5 4 3 2 1	Most speeches reflect hasty or inadequate preparation.
10.	Evaluators build self-esteem and offer positive direction for improvement.	5 4 3 2 1	Evaluations are often overly harsh or overly glossy.
11.	Members are supportive of one another and take pride in each other's accomplishment.	5 4 3 2 1	Members are primarily concerned with their own self-development.
12.	Club Officers perform their tasks diligently.	5 4 3 2 1	Officers frequently fail to fulfill their responsibility.
13.	Club Officers thoroughly understand their role and responsibilities.	5 4 3 2 1	Officers don't understand what they are expected to accomplish.
14.	Officers use the Distinguished Club Program/Club Success Plan as a tool for planning and goal setting.	5 4 3 2 1	Officers are either unaware of the DCP or we are unwilling to use it
15.	There are guests at most meetings.	5 4 3 2 1	Guests rarely attend Club meetings.
16.	Guests are warmly received and made to feel welcome.	5 4 3 2 1	Guests are left to fend for themselves.
17.	Each guest receives a follow up invitation to attend the next meeting.	5 4 3 2 1	No follow up is made.
18.	Most guests who attend meetings eventually join the Club.	5 4 3 2 1	Guests rarely return for a second time.
19.	New members are enthusiastically welcomed, and given special attention and support.	5 4 3 2 1	New members do not feel welcome in the Club and receive little attention.

## ***Reference and Reading List***

**The Maximum Impact System** <sup>©</sup>, Richard S. Hockett, MBA & Frederick Elias, Ph.D., Copyright © 1999

A systems tool for helping perspective Coaches improve Individual, Group, and organizational Communication and effectiveness.

**Building a Team**, Toastmasters International, # 316, Leadership Excellence Series

**Working in the Team Environment**, Toastmasters International, #258, Building Your Leadership Power

**How to Build a Toastmasters Club**, Toastmasters International, #121

**The Skilled Facilitator** (New and Revised), Roger Schwarz, Jossey-Bass, 2002

Roger Schwarz is an organizational psychologist, founder and president of Roger Schwarz & Associates, Inc., an organizational consulting group that helps organizations create fundamental change.

**The Art of Facilitation**, Dale Hunter, Anne Bailey, Bill Taylor, Fisher Books, 1992

The second book by the authors of *The Zen of Groups – A Handbook for People Meeting with a Purpose*. Their first book has been accepted internationally. *The Art of Facilitation* exposes how groups can be more effective by focusing on the roles and skills of the facilitator. All authors are skilled facilitators.

**Take Action**, Susan Bixler and Lisa Scherrer, Ballantine Books, 1997

Susan Bixler is a widely recognized author and speaker, President and Founder of The Professional Image, Inc., the first company to focus on the image and communication needs of corporations and businesses. Her client list is straight off the Fortune 500 leadership list. She is referred to by the national media as the leading expert in her area. She is the author of *The Professional Image* and *Professional Presence*, the former having been translated into three different languages.

Lisa Scherrer is director of training for The Professional Image, Inc., and co-authored *Professional Presence* for Merck Managers, and assisted in the year long development of “train-the-trainer” program for Merck & Company. She currently runs highly acclaimed. Seminars for Fortune 500 companies

*Take Action* outlines fundamentals for success in today’s business environment, changing opinions and attitudes.

**Getting to Yes** (Second Edition), Roger Fisher, William Ury & Bruce Patton, Houghton Mifflin Company,

*Getting to Yes* is a concise strategy for negotiating by developing agreements by focusing on issues, and the fundamental problems, not personalities. Roger Fisher teaches negotiation at Harvard Law School. William Ury is a consultant and author, as well as a lecturer on negotiation. Bruce Patton is deputy director of the Harvard Negotiation Project and the Thaddeus R. Beal Lecturer on Law at Harvard Law School.

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*Getting Past No* was an extension of the ideas expressed in *Getting to Yes*. It covers five specific Strategies to overcome barriers to negotiation. The author is a consultant, lecturer, and author.

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*Healing the Downsized Organization* outlines strategies leaders need to follow in having their company, those “surviving,” AND those leaving from a major business downturn. Delores Ambrose, Ed.D. is the author of *Leadership; the Journey Inward*, outlining her fifteen years of consulting with business, government, and social services organizations as they transformed themselves by downsizing, restructuring, and other means. She is owner of Ambrose Consulting and Training, a Pittsburg-based manufacturing consulting firm with customers including AT&T and Westinghouse. She is adjunct professor of management at Carnegie Mellon University and a speaker much in demand.

**Harvard Business Review on Change**, Harvard Business School Press. 1998

*Harvard Business Review on Change* outlines the fallacies and challenges of change, both at the individual and at the corporate level. Each chapter is written by different subject matter experts:

Anthony Athos, co-author of *The Art of Japanese Management* with Richard Pascale. Norman R. Augustine, past CEO of Martin Marietta and Lockheed Martin, recent recipient of the National Medal of Technology by the President of the U.S.

James C. Collins, Management research in Colorado, co-author of *Built to Last: Successful Habits of Visionary Companies*.

Jeane Daniel Duck, Boston Consulting Group, author of several articles on organizational change, taught at University of Alabama, Birmingham and Pratt Institute.

Tracy Goss, author, lecturer, co-founder Center for Executive Re-Invention.

John P. Kotter, Professor, Harvard Business School, author of several best sellers, including *Leading Change*.

Roger Martin, director of Monitor Company, author of *The Responsibility Virus*.

Richard Pascale, associate fellow of Oxford University, member of Stanford’s Graduate School of Business for 20 years. Co-Author of *The Art of Japanese Management* with Anthony Athos.

Jerry I. Porras, Lane Professor of Organizational Behavior and Change at the Graduate School of Business, Stanford University, teacher of MBA courses, author of many business books.

Robert H. Schaffer, founder of Robert H. Schaffer and Associates and head for more than 30 years. Author of *The Breakthrough Strategy*.

Paul Strebel, director of International Institute for Management Development’s program on leading corporate change.

Harvey A. Thompson, principal at Robert H. Schaeffer & Associates, managing Canadian operations, previously professor of management at McGill University.

***Teams Work***, Nadine Grant and M. J. Cross, GCCG Books, 1996

*Teams Work* provides Exercises in understanding and working with differing personalities. Nadine Grant and M. J. Cross are co-founders of Grant Cross Communications Group, Inc., THE PEOPLE TOOLS COMPANY, bringing over forty years of combined business and educational experience to the professionally speaking and out-source training industries.

**Harmony, Business, Technology & Life after Paperwork**, Arno Penzias, Harper Business, 1995

A practical expose on issues related to organizational downsizing, re-engineering, and restructuring, and the effect of technology on the working environment. Arno Penzias earned the Nobel Prize in Physics for his part in the “Big Bang” theory. He has worked at Bell Labs where he is currently VP of research, and vice chairman of the Committee of Concerned Scientists.

**Skills for Success**, Adele M. Scheele, Ph.D., Ballantine Books, 1996

Adele M. Scheele is a nationally known career strategist, concentrating on taking charge of individual and organizational opportunities. She has a Ph.D. with honors at UCLA, and frequently appears on television and radio.

*Skills for Success* is a career development planning manual.

**Tough-Minded Management**, J.D. Batten, American Management Association, 1969

*Tough-Minded Management* is a time-honored expertise on outlining skills required for successful management of large organizations in today’s world. J. D. Batten was Director and Former Chairman of the Board of General Mills, President of Batten, Batten, Hudson, and Swab, Inc., management consultancy in Des Moines, Iowa. J. D. Batten is author of two other books, *Beyond Management by Objectives* and *Developing a Tough-Minded Climate ... For Results*.