



# DISTRICT LEADERSHIP HANDBOOK

A Guide to Effective  
District Management





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District Management

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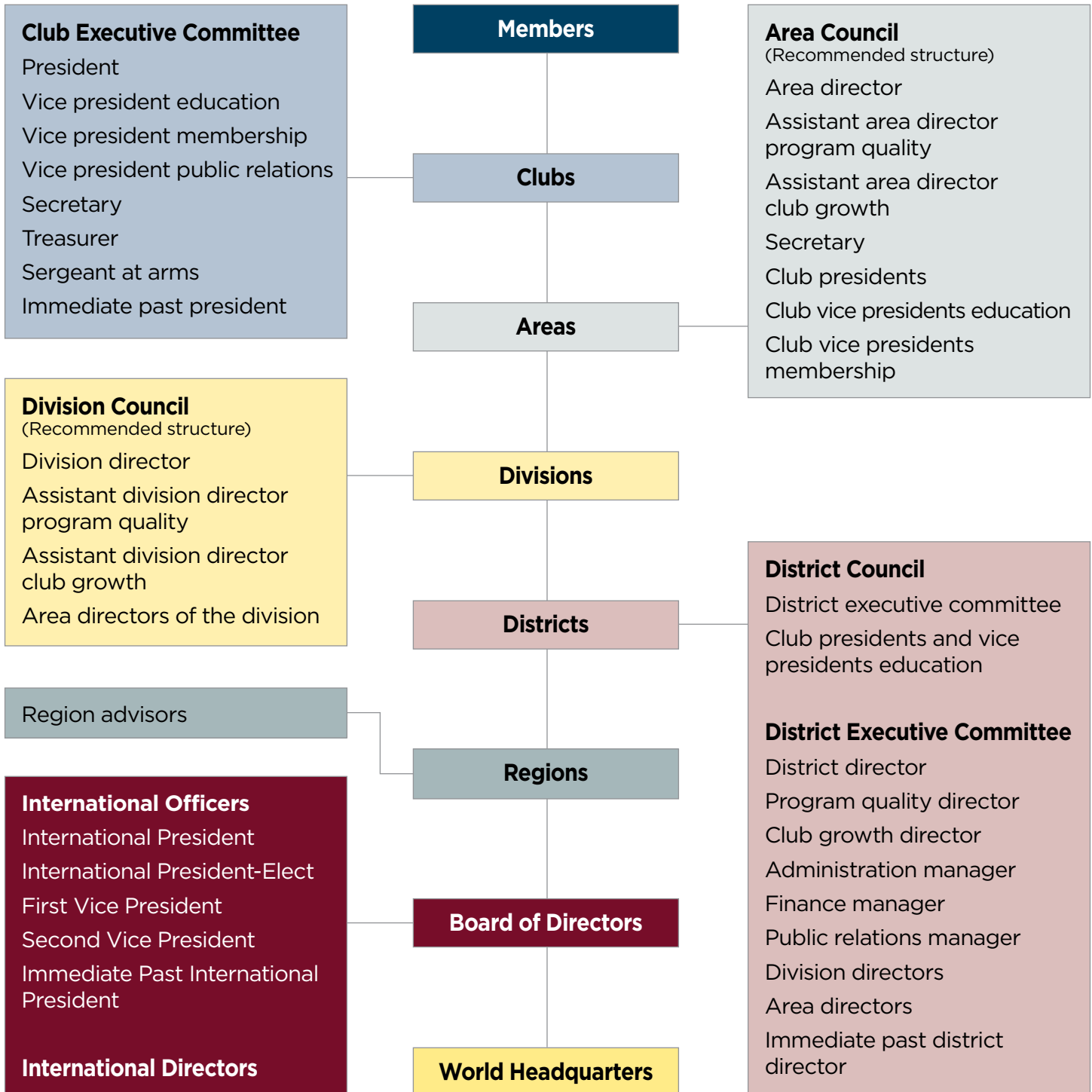
**WHERE LEADERS  
ARE MADE**

[www.toastmasters.org](http://www.toastmasters.org)

# MAP OF SERVICE TO MEMBERS



Members are the heart and foundation of Toastmasters International. Below is a representation of each service level in support of the member.



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# MISSIONS, VALUES AND PROMISES

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## **Toastmasters International Mission**

We empower individuals to become more effective communicators and leaders.

## **District Mission**

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

## **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.

## **Toastmasters International Values**

- ▶ Integrity
- ▶ Respect
- ▶ Service
- ▶ Excellence

## **Toastmasters International Brand Promise**

This is the promise Toastmasters International makes to club members. Once we have reached this goal consistently, through all clubs across the globe, we will have achieved club excellence.

## **A Toastmaster's Promise**

As a member of Toastmasters International and my club, I promise

- ▶ To attend club meetings regularly
- ▶ To prepare all of my projects to the best of my ability, basing them on the Toastmasters education program
- ▶ To prepare for and fulfill meeting assignments
- ▶ To provide fellow members with helpful, constructive evaluations
- ▶ To help the club maintain the positive, friendly environment necessary for all members to learn and grow
- ▶ To serve my club as an officer when called upon to do so
- ▶ To treat my fellow club members and our guests with respect and courtesy
- ▶ To bring guests to club meetings so they can see the benefits Toastmasters membership offers
- ▶ To adhere to the guidelines and rules for all Toastmasters education and recognition programs
- ▶ To act within Toastmasters' core values of integrity, respect, service and excellence during the conduct of all Toastmasters activities.

# INTRODUCTION

As a district leader, you are part of Toastmasters International, an organization with a noble mission: to empower individuals to become more effective communicators and leaders.

Encouraging educational excellence in each club is fundamental in accomplishing this mission. Members receive the full benefits of their membership through the Toastmasters communication and leadership programs.

Serving as a district leader is a great responsibility and an exciting opportunity. Your term of office is filled with chances for you to renew your perspective, practice teamwork and develop your capacity to translate values and strategies into productive actions.

Members of your district team depend on you to help them develop their own goals and achievements. Clubs see you as a facilitator to their success. You instill a sense of enthusiasm, fidelity and responsibility throughout your district.

The tools and resources in this handbook can help you create strategies for success and fulfill your duties as a leader. Publications available on the Toastmasters International website are called out throughout this handbook. You can use these resources to find answers to your leadership questions, whether you're an experienced leader or a novice.

As a district leader, it is your duty to uphold Toastmasters International's bylaws, policy and protocol. Excerpts from these governing documents are referenced throughout this handbook. For further information and clarification, please regard the governing documents at [www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs) as the ultimate source of authority on any given topic.

A district's success depends on the quality of its leadership. It is up to you to create and maintain an atmosphere of enjoyment, teamwork and dedication. You are responsible for fulfilling the district mission and achieving recognition in the Distinguished District Program.

A successful district establishes a climate in which everyone is committed to the district's mission.

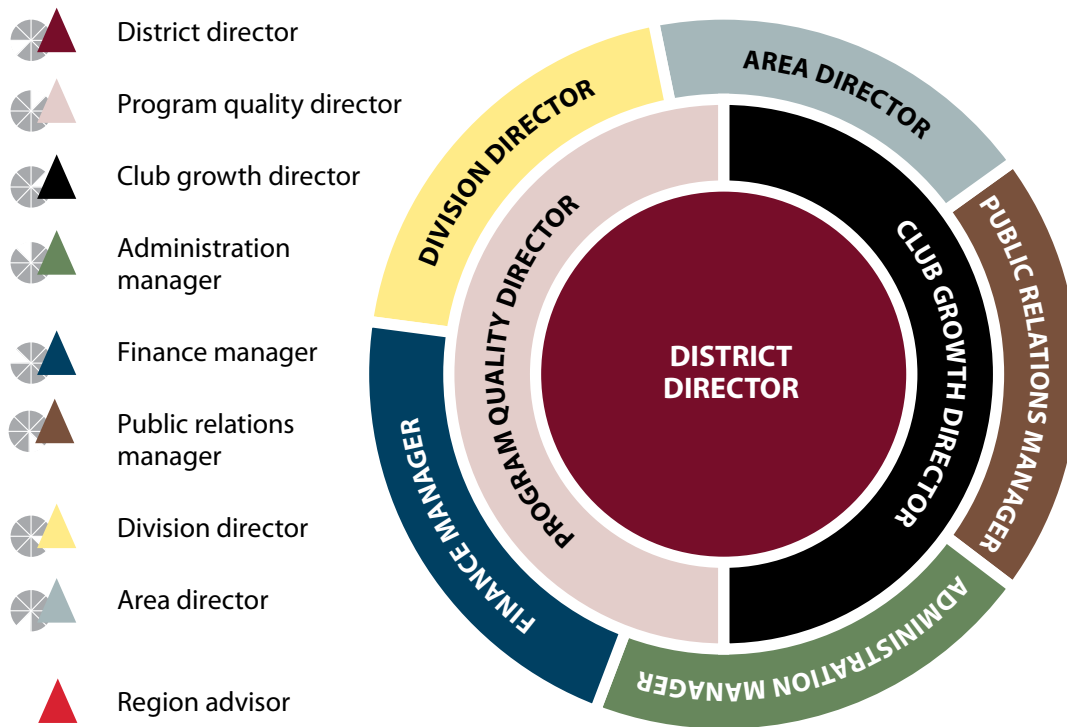
## DISTRICT-LEVEL LEADERSHIP POSITIONS

In order to lead your team effectively, you must first understand your role within the organization as a district leader. Having a clear understanding of your responsibilities and the appropriate procedures for your role is essential to the success of the district. Once you know your responsibilities, you can work cohesively with your team members and fellow district leaders. The terms of all district officers shall commence at 12:01 a.m. on July 1 and end on the following June 30, at midnight. Vacancies filled after September 1 will not be considered as serving a complete term and will not qualify for ALS credit.

The district-level leadership positions described in this handbook are each represented by an icon specific to that role. Throughout the handbook, identify information especially pertinent to your role by locating your icon in the margins:

### LEADERSHIP EDUCATION PHILOSOPHY

Leaders achieve results for their districts by giving priority attention to the needs of their members and fellow district leaders. Consider yourself a steward of your district's resources—human, financial and physical. Leadership is a lifelong journey that includes a desire to serve others and a commitment to lead. Strive to be trustworthy, self-aware, humble, caring, visionary, empowering and relational.



While the region advisor role is a region-level position and not a district-level position, the region advisor is a primary resource for district leaders. Therefore, when information important to the region advisor role is mentioned, the region advisor icon appears.

### District Leader Responsibilities

- Uphold the governing documents of Toastmasters International.
- Foster an atmosphere of enjoyment, teamwork and dedication in the spirit of learning, growing and achieving.
- Work to fulfill the district mission.
- Strive to achieve recognition in the Distinguished District Program.
- Prepare your successor to assume office.

### District Leadership Resources

District leader roles

[www.toastmasters.org/districtleaderroles](http://www.toastmasters.org/districtleaderroles)

*Toastmasters International District Recognition Program* (Item 1490)

[www.toastmasters.org/1490](http://www.toastmasters.org/1490)

### NEED HELP?

Check out our frequently asked questions available on the Toastmasters International website: <https://www.toastmasters.org/faq>. In addition, you may contact World Headquarters for assistance with any questions or concerns: [www.toastmasters.org/contactus](http://www.toastmasters.org/contactus).

# DISTRICT GOVERNMENT

## DISTRICT ADMINISTRATIVE BYLAWS

### Article II: Purpose

The purpose of the district is to enhance the quality and performance and extend the network of the member clubs of Toastmasters International within the boundaries of the district, thereby offering greater numbers of people the opportunity to benefit from the Toastmasters educational program by focusing on the critical success factors as specified by the district educational and membership goals, ensuring that each club effectively fulfills its responsibilities to its individual members, and providing effective training and leadership-development opportunities for club and district officers.

### KEYS TO FULFILLING THE DISTRICT MISSION

- Build new clubs and support all clubs
- Establish clear, measurable goals
- Develop and execute a plan
- Train
- Budget resources—time, money, materials and people
- Recognize and reward achievement

## GOVERNING DOCUMENTS

### Toastmasters International Governing Documents

- Articles of Incorporation and Bylaws of Toastmasters International
- Club Constitution for Clubs of Toastmasters International
- District Administrative Bylaws
- Policy and Protocol

Each district is governed by the bylaws, policy and protocol of the organization; the **District Administrative Bylaws** is the governing document that specifically addresses district leadership and operations. While districts cannot create policy, they do have the ability to implement procedure manuals that capture operational processes at the district level. Districts may not register as a separate entity with local government agencies unless directed by Toastmasters International.

Throughout this handbook, information presented verbatim from a governing document is called out from the regular text. Often, articles, sections, policies and bylaws include more information than is pertinent to the subject matter at hand. In these cases, keep in mind that only the applicable excerpt is cited.

### Governing Documents Resource

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)

## DISTRICT PROCEDURES

Districts may establish procedures to provide consistency and help guide district leaders from year to year. Procedures may be established and changed by either the district executive committee or the district council.

District operating procedures may not be called “policy” or “protocol,” and they cannot duplicate, contradict or be more restrictive than Toastmasters International governing documents. Only Toastmasters’ Board of Directors may create policies.

Consult District Leader Service and Support at World Headquarters before adopting new district procedures or before making significant changes to existing procedures, and provide a copy of your district’s procedures manual to World Headquarters for review. Each year, post district procedures on the district website.

## DISTRICT COMMITTEES

Through various district committees, members and district leaders work together and build effective teams that support the district and enhance the quality of the member experience.

### DISTRICT EXECUTIVE COMMITTEE

The district executive committee includes the district director, program quality director, club growth director, public relations manager, district administration manager, district finance manager, division directors, area directors and immediate past district director. Apart from these leadership roles, only individuals who are invited by the district director and have specific business before the committee may attend district executive committee meetings. In order to conduct business at these meetings, a quorum is required. A quorum is established when a majority of district executive committee members attend the meeting. The committee is subject to the direction and approval of the district council. See **District Administrative Bylaws, Article XI: Committees**, (a) District Executive Committee.



#### DISTRICT EXECUTIVE COMMITTEE

The district executive committee ensures that the district and its leaders are working toward the achievement of the district mission.

#### POLICY AND PROTOCOL

##### Protocol 7.1: District Events, 4. District Executive Committee Meetings, D

The district executive committee meets at least four times each year. One meeting shall be conducted in-person. Additional meetings are conducted in-person or virtually.

#### District Executive Committee Duties

- Review and approve the District Success Plan.
- Present district budget to the district council for approval.
- Oversee the district's financial operation.
- Recommend the assignment of clubs to areas and divisions.
- Review recommendations and reports of district committees.
- Assume tasks assigned by the district council.
- Review ethics and conduct issues as needed.

### District Procedure to Discipline a Member

The district executive committee is empowered to resolve disputes related to district-level activities. A district disciplinary procedure helps the committee resolve these disputes. When necessary, this procedure allows districts to discipline committee members, other appointed district officials or Toastmasters members participating in district activities.

A Toastmasters member who expresses concern about any ethics and conduct issues or other violation involving another member participating in district activities may submit a formal written complaint to the district director. If the district director determines the complaint is reasonably credible, a confidential and timely investigation must be completed in an effort to reach a mutually agreeable resolution. If a resolution is not reached, the district director informs District Leader Service and Support at World Headquarters and refers the matter to the district executive committee to determine if a

hearing is needed. See **Policy and Protocol, Protocol 3.0: Ethics and Conduct, 3**. District Procedure to Discipline a Member. Removal of a district leader requires a two-thirds vote by the entire district executive committee. See **District Administrative Bylaws, Article VII: Officers, (g) Resignation or Removal**.

If anyone ever threatens to take legal action for an issue related to Toastmasters, World Headquarters must be contacted immediately via [legal@toastmasters.org](mailto:legal@toastmasters.org).

## OTHER DISTRICT COMMITTEES

Other committees may be appointed by the district director or the district council. See **District Administrative Bylaws, Article XI: Committees, (d) Other Committees**.

### Possible District Committees

- Program quality committee
- Club growth committee
- Public relations committee
- Youth Leadership program committee
- Speechcraft committee
- Administrative policies committee
- Awards committee
- Speakers bureau committee
- Newsletter committee
- Past district directors committee

The more active committees a district has, the more it can accomplish. That is why it is important for the district director, program quality director and club growth director to empower motivated members to participate in district committees. You'll find district committees mentioned throughout the handbook.

### District Committees Resources

District Administrative Bylaws	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
<i>Toastmasters International District Recognition Program</i> (Item 1490)	<a href="http://www.toastmasters.org/1490">www.toastmasters.org/1490</a>
District questions	<a href="mailto:districts@toastmasters.org">districts@toastmasters.org</a>

## DISTRICT COUNCIL

### DISTRICT COUNCIL AUTHORITY

The district council—which includes district leaders, club presidents and vice presidents education—serves as the administrative governing body of the district, operating with powers delegated to the district council by the Board of Directors of Toastmasters International. The district council conducts all business of the district, assumes responsibility for the payment of all debts incurred in the presentation of district council meetings and other district functions, and does not assess or impose any financial obligation on any club or member of a club. See **District Administrative Bylaws, Article IX: District Council, (b) Authority**.

## DISTRICT COUNCIL MEETINGS



The district council holds at least two regular meetings during each year. One of the required meetings is held in-person **between March 15 and June 1**. The other required meeting is held as soon as practical after the Toastmasters International Annual Business Meeting, but no later than **September 30** in order to approve the district budget and appointed officers for submission to World Headquarters.

Aside from the in-person meeting held between March 15 and June 1, all other meetings are conducted virtually. The agenda is posted at least 14 days prior to the meeting, and notice of voting is sent in writing to all district council members at least four weeks in advance. Include the dates of the council meetings and conference on the district website and in communications to club and district leaders during the year.

District committee chairs and others whose participation the council requires may attend. Members attending the district conference who are not voting members of the council or their proxies may attend but do not participate in council deliberations. See **Policy and Protocol, Protocol 7.1: District Events, 5. District Council Meetings**.

Both meeting schedules include education programs or sessions for all district council members in attendance.

### **POLICY AND PROTOCOL**

#### **Protocol 7.1: District Events, 5. District Council Meetings, F**

At district council meetings, unless noted, the following business is conducted:

- I. The district mission is reviewed.
- II. The credentials committee report is presented.
- III. The audit committee report is presented.
- IV. The district budget is adopted at the first district council meeting.
- V. The Profit and Loss Statement is presented.
- VI. Appointed officers are confirmed at the first district council meeting.
- VII. The district executive committee's action to fill any vacancies in district office is confirmed.
- VIII. The assignment of clubs to areas and divisions for the following year is adopted at the district council annual meeting.
- IX. The district leadership committee report is presented at the district council annual meeting.
- X. Nominations from the floor are taken, and election of district officers is conducted at the district council annual meeting.
- XI. The district director, program quality director, club growth director, immediate past district director, and public relations manager report on progress toward district goals.

### **QUORUM**

The minimum number of the members required to be present for a meeting to transact business.

## **District Council Quorum**

A quorum is needed to conduct business. If any business is done at council meetings where a quorum is not present, then a majority of the clubs must approve the action through a post-meeting vote. See **District Administrative Bylaws, Article X: Council Meetings, Quorum, Proxies and Voting**, (a) Regular meetings.

## DISTRICT ADMINISTRATIVE BYLAWS

### Article X: Council Meetings, Quorum, Proxies, and Voting, (c) Quorum

One-third of the club presidents and vice presidents education from member clubs in the district, or proxies...shall constitute a quorum for all district council meetings. In the event that any business is transacted at any district council meeting at which a quorum is not present, the action shall be deemed as valid as if a quorum were present if it thereafter is expressly approved in writing, personally, by mail, fax, email, electronic transmission or other reasonable means, by the affirmative vote of a majority of the member clubs in the district on the basis of two (2) votes per club.

## RECORDS

All district funds, bank statements, canceled checks, original invoices, check requests and other financial documents are the property of Toastmasters International and not of any individual, area, division or district. The finance manager is responsible for storing and preserving records for the current administrative year, and the records must be made freely available to district leaders and to individual members to inspect and review.

## POLICY AND PROTOCOL

### Policy 8.4: District Fiscal Management, 2

All district funds, regardless of source, are Toastmasters International funds and are to be used to carry out the Toastmasters International and district missions.

Outgoing district leaders must deliver all district funds and records to the new finance manager or new district director no later than **July 1** of each new district administrative year. The outgoing finance manager and the outgoing district director may retain copies of any records necessary to complete the district Year-end Audit. If they receive any funds, statements or other financial documents after July 1 they must immediately give them to the new finance manager or new district director.

In order to satisfy United States Internal Revenue Service requirements, the district must send to World Headquarters, by **August 31** each year, original records for the previous administrative year for storage at World Headquarters. Toastmasters International honors requisitions for funds and supply orders after August 31 only if it has received these records.

Correspondence, memoranda and other communications received by a district are district records and Toastmasters International property.

The district director must determine whether the contents of these communications should be shared with other district leaders and their method of distribution based on the best interests of the district and Toastmasters International.

### DOCUMENTS OF PREVIOUS ADMINISTRATIVE YEAR DUE TO WORLD HEADQUARTERS AUGUST 31

- Canceled checks
- Bank statements
- Paid invoices
- Cash-receipts journals
- Cash-disbursement journals
- Fixed Asset Template
- Accrual Template
- All other supporting documents

Other materials must also be kept for specific lengths of time:

MATERIAL	LENGTH OF TIME	
Meeting minutes and attendance records	always	—————▶
Copies of audits, budgets, profit and loss statements and financial statements	7 years	•••••••
Long-range and operational plans	3 years	•••
Correspondence	3 years	•••
Online club visit forms	1 year	•

### District Government Resources

District questions	<a href="mailto:districts@toastmasters.org">districts@toastmasters.org</a>
Retention of club records guidelines	<a href="http://www.toastmasters.org/retentionofclubrecords">www.toastmasters.org/retentionofclubrecords</a>
District financial questions	<a href="mailto:districtfinancialquestions@toastmasters.org">districtfinancialquestions@toastmasters.org</a>

# DISTRICT STRUCTURE



## DISTRICT ALIGNMENT

### THE DISTRICT ALIGNMENT COMMITTEE

The task of aligning the clubs, areas and divisions within the district is the responsibility of the district alignment committee. The district alignment committee is a group of district members appointed by the district director and led by the alignment chair. The alignment chair ensures the committee prepares an alignment proposal and submits it to the district executive committee prior to the district council meeting.

It is never too early to form a committee to review the district's alignment and put forward a structure for the next program year. The committee should construct a plan that serves the clubs in the most effective way possible while meeting Toastmasters International policy requirements. It is important for the district to consider club growth as well as club loss when creating its proposal.

Each area has a minimum of four clubs and no more than six clubs. An area with fewer than four clubs is cause for concern in terms of long-term growth potential. Under no circumstances may an area have more than six clubs at the beginning of the program year, July 1. However, an area may consist of three clubs on July 1 if a concentrated effort to charter a fourth club is in process.

All districts have geographic boundaries. The geographic boundaries of a district are established at the time of its formation. A description of district boundaries is included in Article V of the **District Administrative Bylaws**. Should the district want to change its boundaries, any proposed changes must be approved by the district councils of all districts involved and submitted to World Headquarters for the consideration of the Board of Directors.

Once each year, districts must review and amend, if necessary, the alignment of the clubs, areas and divisions within their boundaries. The result is subject to the approval of the district council at its annual meeting between March 15 and June 1.

Changes cannot be made after the approval, so it is important that the alignment is correct because it is effective throughout the year.

Individual alignment templates will be sent to districts by the end of June. Alignment plans are returned to World Headquarters by **July 15** on the template provided. No other format is accepted.

Take the necessary time to discuss strategy with the district alignment committee and define goals and expectations.

To help with this task, here is a proposed timeline:

<u>December</u>	<u>January/ February</u>	<u>February/ March</u>	<u>April/May</u>	<u>June/July</u>
The district forms an alignment committee and orients the committee members, making sure they have the background, resources and information necessary to function properly.	The alignment committee identifies alignment changes, gathering input from area and division directors as needed. To ensure leadership roles are filled appropriately during the next program year, the alignment committee must inform the nominating committee about any proposed changes.	The alignment committee prepares the alignment proposal and provides it to the district executive committee for review. The district gives appropriate notice to clubs affected by the alignment being considered.	The district council approves final alignment.	The alignment is reported to Toastmasters International. Clubs, areas and divisions are provided with the final alignment.

## Alignment Considerations

- At least three areas per division
- No fewer than four clubs and no more than six per area
- Geography
- Ability to participate in the Distinguished programs
- Possible growth and possible loss of clubs in those areas and divisions
- Changes anticipated by current district leaders
- Strategy focused on the benefits for all
- Low and ineligible clubs must be included

The district alignment committee considers several factors when recommending alignment changes. Clubs are typically assigned to an area based on geographic proximity to other clubs, the availability of an area director to effectively provide service, club size and strength, prospective clubs and expected growth and the likelihood of eligibility in Distinguished programs. Advanced clubs may not be segregated into areas. It is recommended that areas not be segregated by language. Clubs that charter after the alignment is approved by the district council must be placed into existing areas.

Alignment plans that do not meet policy requirements cannot be accepted. The district alignment committee must ensure that the proposal meets these requirements before bringing it forward. See **Policy and Protocol, Protocol 7.0: District Structure, 1. Club Assignments.**

Communicate the approved alignment with clubs, areas and divisions. Provide the final alignment to World Headquarters as soon as possible, and no later than **July 15.** See **Policy and Protocol, Protocol 8.4: District Fiscal Management, 3. District Reserve Account, B, I.**

## DIVISIONS

The formation of divisions is optional. If divisions are part of the district structure, single letters must designate them. For example, divisions may be assigned the letters N, S and C for Northern, Southern and Central. The same letter cannot designate more than one division in a district.

Divisions must have at least three areas.

Each division has a director, responsible for supervising activities within the division. The division director, who is elected, works under the supervision of the district director.

## Division Purpose

- Provide district support and resources to clubs and members through area directors
- Aid in administration
- Assist in the presentation of speech contests
- Assist with training area and club leaders
- Help clubs and areas achieve Distinguished goals

## DISTRICT REFORMATION OR CONSOLIDATION

All districts, divisions and areas of Toastmasters International should provide the highest potential for continued club and membership growth. Thus, new districts should be created and existing districts consolidated or reformed only after the Board of Directors has determined that there are enough existing clubs in the territory to be included within the proposed new or consolidated districts. These clubs also must be of sufficient membership strength to ensure efficient and financially sound administration of such proposed districts. Once formed, a district should continue to operate as a district only so long as it meets certain minimum standards.



### DIVISION COUNCIL FUNCTIONS

- Advisory group for the division
- Achievement of club, area, division and district objectives
- Division contests, meetings and training

## ▲▲ DIVISION COUNCILS

Division council members are the division director, assistant division director program quality, assistant division director club growth and area directors within the division.

The division council manages division activities; facilitates the achievement of club, area, division and district goals; and helps with administrative activities, such as division contests, meetings and training.

The division council meets at least twice each year. Meetings are conducted in-person when practical. The division director notifies attendees at least four weeks before each meeting.

See **Policy and Protocol, Protocol 7.1: District Events, 6. Division Council Meetings.**

## ▲ AREAS

Clubs are assigned to areas (four to six clubs per area) by the district alignment committee and approved by the district council. Area assignments for new clubs are reported in writing to World Headquarters at the time the club receives its charter. These assignments must be confirmed by the district director.

### Area Purpose

- Ensure each club fulfills its responsibilities to its members and becomes a Distinguished club.
- Promote and extend the benefits of membership in Toastmasters clubs.
- Help in the organization of new clubs.
- Facilitate the training of club leaders.
- Encourage clubs to undertake efforts that create greater community awareness of Toastmasters and make Toastmasters available to more people.
- Oversee and conduct quality speech contests in the district.

## ▲ AREA COUNCILS

Area council members include the area director, assistant area director program quality, assistant area director club growth, area secretary, club presidents, club vice presidents education and club vice presidents membership.

The area council manages area activities and supports each club in the area in fulfilling the club mission.

The area council meets at least twice each year. Meetings are conducted in-person when practical. The area director notifies attendees at least four weeks before each meeting.

See **Policy and Protocol, Protocol 7.1: District Events, 7. Area Council Meetings.**

## ▲ CLUBS

At the center of Toastmasters is the club. The mission of the club is to 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.

All existing clubs that meet within the boundaries of a district, and all new clubs formed within those boundaries are assigned to that district. Assignment of a new club to an area is made by the district director, subject to approval by the district executive committee.

The district's role is to build new clubs and support all clubs in achieving excellence. The district must take the initiative in acquainting the clubs with the activities, services and assistance offered by the district and by Toastmasters International.

## CLUB LEADER INSTALLATION



One district function is to install leaders of Toastmasters clubs when invited to do so. The area director is the district team member best suited to handle this important opportunity, although a division director or a past president of the club can do it. In a company or government club, a key executive or public figure, such as the corporation president or military officer, may be willing to perform the ceremony.

## GAVEL CLUBS

Gavel clubs, which operate as special groups affiliated with Toastmasters International, are formed as a result of individuals' inability to comply with eligibility requirements. See the **Bylaws of Toastmasters International, Article I: Purpose, Section 2, (f), and Article III: Membership, Section 1.**

The gavel club program is administered by World Headquarters, which provides materials, methods and services to gavel clubs. Gavel clubs are not affiliated with any Toastmasters club or district. However, members, clubs and districts may have working relationships with gavel clubs or lend them support. See **Policy and Protocol, Policy 5.1: Gavel Clubs.**

### Gavel Club Resources

Gavel club questions

[newclubs@toastmasters.org](mailto:newclubs@toastmasters.org)

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)

## DISTRICT TIMELINE

### JULY

### AUGUST

### SEPTEMBER

#### Specific Deadlines

#### JULY 1

- Start: Toastmasters year
- Start: Distinguished Programs

#### AUGUST 1

- ▲ Start: Smedley Award membership-building program

#### SEPTEMBER 1

- ▲ Due: changes to district leader list for Advanced Leader credit

#### JULY 15

- ▲ Due: district leader list (along with signed Officer Agreement and Release Statements)
- ▲ Due: district calendar
- ▲ Due: area and division alignment changes
- ▲ Due: District Signature Form and bank signatory card

#### AUGUST 31

- ▲ End: club officer training for Distinguished credit
- ▲ Due: Year-end Audit Report for previous year
- ▲ Due: previous year's financial records
- ▲ Due: Fixed Asset Template and Accrual Template

#### SEPTEMBER 30

- ▲ Due: first-round club officer training reports
- ▲ Due: Division and Area Directors Training Report
- ▲ Due: District Success Plan
- ▲ Due: district budget
- ▲ End: Smedley Award membership-building program

#### Important Tasks

### JULY

- ▲ Start: first-round club visits
- ▲▲▲ Continue first-round club officer training
- ▲ Submit first-round club officer training reports online
- ▲▲▲ Continue division director and area director training
- Transfer all records to new administration
- ▲▲▲ Create district budget
- Contact clubs that have not submitted club officer lists
- Foster leadership team-building
- ▲ Prepare previous year's financial records for submission to World Headquarters
- ▲▲ Review district accounting system webinars
- ▲ Develop comprehensive communication plan for the new program year
- ▲ Publicize the district's semifinalist in the International Speech Contest

### AUGUST

- ▲ End first-round club officer training
- ▲ Submit first-round club officer training reports online
- ▲ End division director and area director training
- ▲ Attend District Leader Training prior to International Convention
- Prepare for district executive committee meeting and district council meeting
- Place orders for custom district event items at [www.toastmasters.org/districtproductguide](http://www.toastmasters.org/districtproductguide)
- ▲ Prepare previous year's financial records for submission to World Headquarters
- ▲ Pay all remaining prior year bills
- ▲ Publicize the district's semifinalist in the International Speech Contest
- Clubs submit membership-renewal dues online

### SEPTEMBER

- ▲▲▲ Work on the District Success Plan
- Clubs submit membership-renewal dues online
- ▲ Send proxy/credentials forms to club presidents and vice presidents education at least two weeks before the district council meeting
- Prepare for district executive committee meeting and district council meeting

## OCTOBER

## NOVEMBER

## DECEMBER

### OCTOBER 1

- ▲ Due: membership-renewal dues for credit in the Distinguished Club Program
- ▲ Due: appointment of district leadership committee chair

### OCTOBER 31

- ▲ Due: Quarter 1 Profit and Loss Statement with certification page and narratives

### NOVEMBER 1

- ▲ Due: appointment of audit committee
- ▲ Due: appointment of district leadership committee

### NOVEMBER 30

- ▲ End: first-round club visits
- ▲ Due: first-round club visit reports
- ▲ Due: changes to first-round club officer training reports

No later than November 30:  
Call for candidate declarations

### DECEMBER 1

- ▲ Start: second-round club officer training

### DECEMBER 15

Due: candidate declaration of intent to run due to District Leadership Committee

### DECEMBER 31

Due: club officers lists from clubs with semiannual terms

## OCTOBER

- ▲ Plan audit committee appointments for Mid-year Audit
- ▲▲ Evaluate training for opportunities for improvement
- Clubs submit membership-renewal dues online
- ▲ District Director appoints District Leadership Committee (DLC) chair

## NOVEMBER

- ▲ Contact clubs that have not paid membership-renewal dues
- Share successes and challenges with other leaders
- Show appreciation for volunteers
- ▲▲ Publish call for candidates
- ▲ DLC members are recommended by the DLC chair and approved by the District Director

## DECEMBER

- ▲ Start: second-round club visits
- ▲ Start second-round club officer training
- ▲ Submit second-round club officer training reports online
- ▲▲ Plan for elections
- ▲▲ Plan for annual conference
- ▲ Form district alignment committee
- ▲▲ Publish call for candidates
- ▲▲ Set date for audit
- ▲ Complete Accrual Template and Inventory Template

## DISTRICT TIMELINE

### JANUARY

### FEBRUARY

### MARCH

#### Specific Deadlines

#### JANUARY 1

#### FEBRUARY 1

- ▲ Start: Talk Up Toastmasters! membership-building program

#### MARCH 31

- ▲ Due: second-round club officer training reports
- ▲ End: Talk Up Toastmasters! membership-building program

#### FEBRUARY 15

- ▲ Due: Mid-year Audit Report
- ▲ Due: first half of financial documents
- ▲ Due: Accrual Template and Inventory Template

#### FEBRUARY 28 (OR 29)

- ▲ End: club officer training for Distinguished credit

#### Important Tasks

#### JANUARY

- ▲ Prepare Mid-year Audit Report
- ▲ Continue second-round club officer training
- ▲ Submit second-round club officer training reports online
- ▲ Prepare proxy/credentials forms for district conference
- Audit committee conducts audit
- Attend Mid-year District Leader Training
- ▲▲▲ Publish call for candidates

#### FEBRUARY

- ▲ End second-round club officer training
- ▲ Submit second-round club officer training reports online
- ▲ Prepare proxy/credentials forms for district conference
- ▲ Order speech contest awards
- Prepare for the annual district conference, including district executive committee meeting and district council meeting
- Place orders for custom district event items at [www.toastmasters.org/districtproductguide](http://www.toastmasters.org/districtproductguide)
- ▲ District leadership committee submits report to district director six weeks before district conference
- ▲ Publish district leadership committee report four weeks before district conference
- Clubs submit membership-renewal dues online

#### MARCH

- Clubs submit membership-renewal dues online
- ▲ Order speech contest awards
- ▲ Send proxy/credentials forms to club presidents and vice presidents education at least two weeks before the district conference
- Prepare for the annual district conference, including district executive committee meeting and district council meeting
- ▲ District leadership committee submits report to district director six weeks before district conference
- ▲ Publish district leadership committee report four weeks before district conference
- March 15–June 1: District council annual meetings occur (actual dates set by each district).

## APRIL

### APRIL 1

Due: membership-renewal dues for credit in the Distinguished Club Program

### APRIL 30

▲ Due: Quarter 3 Profit and Loss Statement with certification page and narratives

## MAY

### MAY 1

▲ Start: Beat the Clock membership-building program

### MAY 31

▲ Due: corrections to second-round club officer training reports  
▲ End: second-round club visits  
▲ Due: second-round club visit reports

## JUNE

### JUNE 1

▲ Start: first-round club officer training

### JUNE 30

▲ Due: club officer lists  
End: Beat the Clock membership-building program  
End: Distinguished programs  
End: Toastmasters year

## APRIL

Clubs submit membership-renewal dues online

The annual district conference

▲ Report election and appointment results soon after district conference

▲ Publicize and promote district conference

▲ District leadership committee submits report to district director six weeks before district conference

▲ Publish district leadership committee report four weeks before district conference

## MAY

Plan for the transition of district leaders

▲ Contact clubs that have not paid membership-renewal dues

The annual district conference

▲ Report election and appointment results soon after district conference

▲ Publicize and promote district conference

## JUNE

▲▲▲ Start first-round club officer training  
▲ Submit first-round club officer training reports online

▲▲▲ Start division director and area director training

▲ Plan district calendar

▲ Start Year-end Audit

▲ Submit area and division alignment report on template provided

Meet with incoming district leaders about transitioning to next administration

Foster leadership team-building

▲ Pay all bills for the year by June 30

▲ Prepare files to hand over

▲ Prepare Fixed Asset Template and Accrual Template

▲ Publicize Toastmasters International Speech Contest semifinalist

# LEADERSHIP ROLES



## DISTRICT DIRECTOR

As the district director, you are responsible for directly administering and overseeing the district's day-to-day operations, finances and human resources. You are the only officer who is authorized to sign off on contracts.

Fortunately, you have a team of district leaders to help you fulfill these responsibilities. You must empower your district leadership team members to work together toward the district mission, while supporting each one in his or her development as a leader. Together with your district leadership team, you participate in District Leader Training, Mid-year Training and online training via the District Leader Tutorials on the Toastmasters International website.

To serve as district director, you must have served at least six consecutive months as a club president and at least 12 consecutive months as a program quality director, club growth director or division director, or a combination thereof at the time you take office. See **District Administrative Bylaws, Article VII: Officers**, (d) Qualifications.

## ▲ DISTRICT DIRECTOR RESPONSIBILITIES

### Guidance

The district director supervises and guides all elected and appointed district leaders and is responsible for their success. Your leadership skills provide more than just a means of directing and facilitating the work of the district; your personal leadership style sets the tone and direction for the entire district.

It is the district director who inspires and motivates team members to achieve goals, keeping in mind their development needs.

The district director delegates tasks and authority as appropriate.

When conflicts arise, the district director assists in their resolution.

The district director collaborates with people inside and outside of the district to achieve district goals.

### Financial Resources

As district director, you have fiduciary responsibility and are accountable for the district's management of funds that support the district mission. You administer and oversee the district's financial resources.

Along with the district executive committee, the district director prepares the district budget to be approved by the district council.

The district director authorizes all purchases on behalf of the district.

For a full list of district director competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## District Director Resources

District Leader Tools	<a href="http://www.toastmasters.org/districtleadertoolkit">www.toastmasters.org/districtleadertoolkit</a>
District Success Plan	<a href="http://www.toastmasters.org/dsp">www.toastmasters.org/dsp</a>
District Finance	<a href="http://www.toastmasters.org/districtfinance">www.toastmasters.org/districtfinance</a>
<i>Distinguished Club Program and Club Success Plan</i> (Item 1111)	<a href="http://www.toastmasters.org/1111">www.toastmasters.org/1111</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>
<i>Toastmasters International District Recognition Program</i> (Item 1490)	<a href="http://www.toastmasters.org/1490">www.toastmasters.org/1490</a>
Distinguished Performance Reports	<a href="http://www.toastmasters.org/distinguishedperformancereports">www.toastmasters.org/distinguishedperformancereports</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>

## Presiding Officer

At district executive committee meetings and district council meetings, the district director serves as presiding officer. This means the district director manages the proceedings and keeps the agenda moving forward. As district director, you are expected to manage procedural matters in the conduct of the meeting, and to apply *Robert's Rules of Order Newly Revised* when applicable. You may purchase this book at [amazon.com](http://amazon.com).

It is the district director's responsibility to appoint district leaders and committees as provided for in the **District Administrative Bylaws**, subject to approval by the district council.

## Operations

The district director works with Toastmasters International on matters related to district operations.

It is the district director who is responsible for preparing and submitting all plans and reports to World Headquarters.

The district director leads the district to success by helping clubs reach goals related to education, membership and training.

The district director has a working knowledge of Toastmasters governing documents and manuals for district and club leaders.

To serve the needs of members, the district director is adaptable and willing to change when needed.

### **DISTRICT ADMINISTRATIVE BYLAWS**

#### **Article VII: Officers, (b) Elective Officers**

No district officer may be re-elected to the same office for succeeding terms in which a full year has been served, except that the division directors may be re-elected to succeed themselves for one term.



## PROGRAM QUALITY DIRECTOR

As the program quality director, you are responsible for all aspects of education and training within the district. This includes supporting quality club programming efforts, promoting the Distinguished Club Program and planning, organizing and executing the district conference. You are also responsible for promoting and supporting club quality and member retention.

Together with your district leadership team, you participate in District Leader Training, Mid-year Training and online training via the District Leader Tutorials on the Toastmasters International website.

To be program quality director, you must have served at least six consecutive months as club president and at least 12 consecutive months as a program quality director, club growth director, division director or area director. Once you serve as program quality director for a full year, you may not be re-elected to the same office for a succeeding term. See **District Administrative Bylaws, Article VII: Officers**.



### PROGRAM QUALITY DIRECTOR RESPONSIBILITIES

#### Education Goals

As program quality director, you promote all members in achieving education awards and recognizing those achievements.

The program quality director oversees and promotes training for club, area and division officers.

As program quality director, you are familiar with education and training resources on the Toastmasters website as well as manuals for club and district leaders.

#### Training Programs

As program quality director, you plan, organize and direct the district's training programs.

It is your responsibility to make sure division, area and club leaders are properly trained to fulfill their roles and responsibilities.

Part of your training program duties involve selecting training coordinators and facilitators to conduct district training programs and supporting them in their efforts.

As program quality director, you are responsible for managing a network of trainers as well as soliciting feedback from training participants regarding the trainers.

As your administrative year comes to a close, work closely with the incoming program quality director so that training programs transition smoothly.

For a full list of program quality director competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## Program Quality Director Resources

District Leader Tools	<a href="http://www.toastmasters.org/districtleadertoolkit">www.toastmasters.org/districtleadertoolkit</a>
Speech contests	<a href="http://www.toastmasters.org/speechcontests">www.toastmasters.org/speechcontests</a>
<i>Speech Contest Rulebook</i> (Item 1171)	<a href="http://www.toastmasters.org/1171">www.toastmasters.org/1171</a>
Speech contest frequently asked questions	<a href="http://www.toastmasters.org/speechcontestfaq">www.toastmasters.org/speechcontestfaq</a>
The Toastmasters Education Program	<a href="http://www.toastmasters.org/membereducation">www.toastmasters.org/membereducation</a>
Training club and district leaders	<a href="http://www.toastmasters.org/districttraining">www.toastmasters.org/districttraining</a>
<i>How to Be a Distinguished Club</i> (Item 299)	<a href="http://www.toastmasters.org/299">www.toastmasters.org/299</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>
Tools and products for district conference	<a href="http://www.toastmasters.org/districtproductguide">www.toastmasters.org/districtproductguide</a>

### District Executive Committee

The program quality director is the second-ranking member of the district executive committee. In the absence of the district director, the program quality director presides over the body.

In consultation with and subject to the approval of the district director, you appoint a district conference chair, training coordinators and committee chairs to promote education achievements within clubs.

### District Conference

It is the program quality director who is responsible for all aspects of the district conference. You plan, organize and direct the event.

You will be responsible to work with the district director to ensure all costs and contracts are acceptable. The district director will be the final signatory for all district event contracts.

As program quality director, you supervise the selection of the district conference site.

You are responsible for the educational content presented at the conference.

### Speech Contests

As program quality director, you coordinate and supervise the International Speech Contest at the district level.

Keep in mind that all district-level speech contests are conducted only at the annual district conference.

The program quality director facilitates a smooth flow of information at speech contests.

As program quality director, you have a working knowledge of the *Speech Contest Rulebook* (Item 1171).



## CLUB GROWTH DIRECTOR

As the club growth director, you are responsible for all aspects of marketing, club-building and club-retention efforts within the district. This includes defining an overall marketing strategy for the district, developing outreach and retention efforts with existing community and corporate clubs and penetrating new markets. Additionally, the club growth director supports challenged clubs and helps them to become Distinguished.

Together with your district leadership team, you participate in District Leader Training, Mid-year Training and online training via the District Leader Tutorials on the Toastmasters International website.

To be club growth director, you must have served at least six consecutive months as club president and at least 12 consecutive months as a program quality director, club growth director, division director or area director. Once you serve as club growth director for a full year, you may not be re-elected to the same office for a succeeding term. See **District Administrative Bylaws, Article VII: Officers**.



### CLUB GROWTH DIRECTOR RESPONSIBILITIES

#### Marketing Strategy

The club growth director develops a marketing plan in conjunction with district team members. This marketing plan introduces new initiatives and guides the district in meeting membership and club-growth objectives.

With the district director's approval, the club growth director appoints members to chair club growth committees, such as the club extension chair, club quality chair, club retention chair and club new source research chair. These positions form the district marketing team. Once formed, these committees help the club growth director to design, develop and implement district marketing projects.

As the brand steward at the district level, the club growth director is responsible for ensuring that the district adheres to Toastmasters International brand standards.

#### Membership and Club Growth

As club growth director, you recruit, train and supervise a strong club-building team; you work closely with the region advisor to meet the district's membership and club-building goals.

In collaboration with and subject to the approval of the district director, the club growth director appoints committee chairs as necessary to aid in the organization of new clubs in the district.

It is your responsibility, as club growth director, to assist the club and the district director to appoint club sponsors, mentors for new clubs and club coaches for existing clubs that are struggling. Once appointed, you train, motivate and supervise the club sponsors, mentors and coaches and manage the Club Coach program to help weak clubs achieve recognition in the Distinguished Club Program.

For a full list of club growth director competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## Club Growth Director Resources

District Leader Tools	<a href="http://www.toastmasters.org/districtleadertoolkit">www.toastmasters.org/districtleadertoolkit</a>
Club Growth Director Handbook (Item 110)	<a href="http://www.toastmasters.org/110">www.toastmasters.org/110</a>
Toastmasters marketing resources	<a href="http://www.toastmasters.org/marketingresources">www.toastmasters.org/marketingresources</a>
District marketing team	<a href="http://www.toastmasters.org/districtmarketingteam">www.toastmasters.org/districtmarketingteam</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>
Membership-building programs	<a href="http://www.toastmasters.org/membershipbuilding">www.toastmasters.org/membershipbuilding</a>
Club Mentor Program Kit (Item 1163)	<a href="http://www.toastmasters.org/1163">www.toastmasters.org/1163</a>
Club Coach Program	<a href="http://www.toastmasters.org/clubcoach">www.toastmasters.org/clubcoach</a>
Sponsor, mentor and coach training materials	<a href="http://www.toastmasters.org/sponsormentorcoachtrain">www.toastmasters.org/sponsormentorcoachtrain</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>
Insightly	<a href="http://www.insightly.com">www.insightly.com</a>

### Division, Area and Club Administration

The club growth director monitors division, area and club administration to ensure forms, reports, lists and other information are submitted to World Headquarters in a timely manner. This includes the **Area Director's Club Visit Report** and club officer lists.

As club growth director, you provide quantitative feedback regarding district progress at district leadership meetings.

### District Executive Committee

The club growth director is the third-ranking member of the district executive committee, presiding over that body and the district council in the absence of the district director and program quality director.

Each month, you report on the activities of the district marketing team to the district executive committee. It is your responsibility to delegate and hold district marketing team members accountable.



## ADMINISTRATION MANAGER

As the administration manager, you are responsible for maintaining the historical records of the district, recording and distributing meeting minutes and otherwise maintaining accurate, timely records of district business.

The administration manager may be elected or appointed at the will of the district director, subject to the approval of the district executive committee and confirmation by the district council. You are eligible for re-election or re-appointment for one succeeding term only. The office of administration manager and finance manager may be combined. See **District Administrative Bylaws, Article VII: Officers, (c) Other Officers**.

### ADMINISTRATION MANAGER RESPONSIBILITIES

#### Meeting Minutes

As administration manager, it is your responsibility to record, organize and keep accurate minutes of district executive committee meetings and district council meetings.

#### Documents

The administration manager upholds the **District Administrative Bylaws** and district procedures, and keeps a permanent history of district accomplishments.

#### Correspondence

The administration manager is responsible for all district correspondence.

As administration manager, you help prepare the mailing of announcements for district meetings, copies of minutes, and other district reports to clubs.

For a full list of administration manager competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

### Administration Manager Resources

*Club Leadership Handbook*  
(Item 1310)

[www.toastmasters.org/1310](http://www.toastmasters.org/1310)

District Leader Tutorials

[www.toastmasters.org/districttutorials](http://www.toastmasters.org/districttutorials)

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)



## FINANCE MANAGER

As the finance manager, you are tasked with the fiscal oversight and management of the district. The finance manager works closely with the district director, program quality director and club growth director to ensure that the district is making cost-effective decisions—within policy—that result in effective fiscal management.

The finance manager should have knowledge of accounting and be acquainted with the handling of financial matters.

The finance manager may be elected or appointed at the will of the district director, subject to the approval of the district executive committee and confirmation by the district council. You are eligible for re-election or re-appointment for one succeeding term only. The office of administration manager and finance manager may be combined. See **District Administrative Bylaws, Article VII: Officers, (c) Other Officers.**

### FINANCE MANAGER RESPONSIBILITIES



#### Budgeting

As the finance manager, it is your job to develop, plan and recommend a program for using district financial resources.

This includes assisting the district director in developing a realistic budget based upon the goals of the district.

As finance manager, you also record, monitor, forecast and evaluate the district's financial performance.

The finance manager is responsible for the requisition, receipt and disbursement of district funds.

#### Profit and Loss Statements

Each month, the finance manager is responsible for recording revenues and expenses in the district accounting system; the finance manager is also responsible for reconciling district, division, area and conference bank accounts. In addition to these duties, the finance manager submits the profit and loss statement to the following groups during the time frames specified below:

- **District directors, program quality directors and club growth directors:** monthly
- **World Headquarters, district executive committee and district council:** quarterly
- **District audit committee:** semi-annually

When the profit and loss statement is submitted to the district audit committee, the finance manager must also submit all financial information and records. This allows the committee to review financial results and perform the Mid-year or Year-end audits.

For a full list of finance manager competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## Finance Manager Resources

District Finance	<a href="http://www.toastmasters.org/districtfinance">www.toastmasters.org/districtfinance</a>
District financial questions	<a href="mailto:districtfinancialquestions@toastmasters.org">districtfinancialquestions@toastmasters.org</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>

## District Assets

As finance manager, it is your responsibility to account for all district fixed assets and inventory.

## District Finance Training

As finance manager, it is important to complete the online district finance training module provided via the District Leader Tutorials on the Toastmasters International website.

Upon taking office, you should be familiar with Toastmasters International's bylaws, policy and protocol. You should also be familiar with *Managing District Finances* (Item 1307), a comprehensive financial resource that can help you manage the fiscal responsibilities of your district.

It's also important for you to understand how to use the district accounting system. Training webinars on how to use this system are available on the Toastmasters International website at [www.toastmasters.org/accountingsoftwarewebinars](http://www.toastmasters.org/accountingsoftwarewebinars).



## PUBLIC RELATIONS MANAGER

As the public relations manager, you are responsible for coordinating publicity efforts in the district. By establishing and maintaining lines of communication between the district and its members, as well as between the district and the public, you work to increase awareness of Toastmasters through all available media.

The public relations manager may be elected or appointed at the will of the district director, subject to the approval of the district executive committee and confirmation by the district council. You are eligible for re-election or re-appointment for one succeeding term only. See **District Administrative Bylaws, Article VII: Officers, (c) Other Officers.**

### PUBLIC RELATIONS MANAGER RESPONSIBILITIES

#### Communication Plan

As public relations manager, you develop a comprehensive communication plan at the beginning of the program year. The purpose of this plan is to keep members informed of Toastmasters activities, news and events, such as District Leader Training.

You are also responsible for informing the local community about club and district events and member achievements, which enhances the public's awareness of the organization and its members.

In your role, you motivate members to get and stay involved. You also contribute content for your district's newsletter, website and social media sites.

#### Public Relations and Publicity

In order to attract new members, one of your responsibilities is to create a public relations plan that garners positive publicity in local media outlets.

#### Brand Stewardship

The public relations manager is the guardian of the organization's image: the Toastmasters brand. When communicating with members, prospective members and public and local media, the public relations manager considers Toastmasters branding guidelines and applies them to promotional materials as appropriate.



For a full list of public relations manager competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

#### Public Relations Manager Resources

<i>Let the World Know</i> (Item 1140)	<a href="http://www.toastmasters.org/1140">www.toastmasters.org/1140</a>
Public Relations Manager Training Webinar	<a href="http://www.toastmasters.org/publicrelations">www.toastmasters.org/publicrelations</a>
Media Center	<a href="http://mediacenter.toastmasters.org/">http://mediacenter.toastmasters.org/</a>
Public Relations	<a href="http://www.toastmasters.org/publicrelations">www.toastmasters.org/publicrelations</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>



## DIVISION DIRECTOR

As division director, your job is to lead and support the division through the supervision and support of the area directors.

One of your primary goals as division director is to ensure that each club achieves its mission and fulfills its responsibilities to its members.

To achieve this, you coordinate division activities, set division goals and assist in the training of area and club leaders.

To serve as division director, you must have served at least six consecutive months as a member of a district council. The division director may be re-elected to one succeeding term. See **District Administrative Bylaws**, Article VII: Officers.



### DIVISION DIRECTOR RESPONSIBILITIES

#### Guidance

As division director, you provide motivation, guidance and supervision to area directors to help them fulfill their roles and responsibilities.

This includes contacting area directors at least monthly to discuss progress in the Distinguished Area Program, club visits and the Distinguished Club Program.

#### Division Progress

The division director participates in division director training provided by the district.

As division director, you report regularly to the district director, program quality director and club growth director on division progress.

For a full list of division director competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## Division Director Resources

<i>How to Build a Toastmasters Club</i> (Item 121)	<a href="http://www.toastmasters.org/build">www.toastmasters.org/build</a>
<i>Club Leadership Handbook</i> (Item 1310)	<a href="http://www.toastmasters.org/1310">www.toastmasters.org/1310</a>
<i>Toastmasters International District Recognition Program</i> (Item 1490)	<a href="http://www.toastmasters.org/1490">www.toastmasters.org/1490</a>
<i>Distinguished Club Program and Club Success Plan</i> (Item 1111)	<a href="http://www.toastmasters.org/1111">www.toastmasters.org/1111</a>
<i>Speech Contest Rulebook</i> (Item 1171)	<a href="http://www.toastmasters.org/1171">www.toastmasters.org/1171</a>
<i>Training Club Leaders</i> (Item 217)	<a href="http://www.toastmasters.org/217">www.toastmasters.org/217</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>

### Division Council

The division director serves as division council chair, holding at least two division council meetings each year.

At division council meetings, the division discusses each area's and each club's plan, goals and progress in their Distinguished programs and the need for assistance.

The division director reviews club leader training plans and achievements at the division council meetings.

As division director, you also discuss plans for division speech contests at division council meetings.

### Distinguished Programs

As division director, you are responsible for your division achieving Distinguished division recognition.

It is also your job to assist area directors and clubs in achieving Distinguished recognition.

### Speech Contests

The division director coordinates division speech contests and assists the area director with area speech contests.



## AREA DIRECTOR

As area director, you serve as the direct liaison between the district and the clubs.

The **District Administrative Bylaws** provide for the selection of area directors either by appointment by the district director or by election by the area councils. Toastmasters International recommends that district directors appoint area directors.

Area directors conduct club visits twice a year within their respective areas to understand and support club needs. In turn, these visits help district leaders understand how to support and meet the needs of each club. It is important that area directors have the support they need to serve clubs. The success of the district depends on it.

Area directors are eligible for re-election or re-appointment for one succeeding term only. Ideally, area directors have served as members of a district council. See **District Administrative Bylaws, Article VII: Officers**.

### ▲ AREA DIRECTOR RESPONSIBILITIES

#### Guidance

As area director, you are responsible for leading your area by serving the needs of clubs.

In order to understand clubs' needs, the area director contacts club presidents monthly to discuss their performance in the Distinguished Club Program.

The area director also discusses district training and other district events with the area clubs.

As area director, you follow up on items identified during previous contact with club presidents.

#### Area Council

The area director is the area council chair and holds at least two area council meetings each year.

At area council meetings, the area director discusses each club's plans and goals in the Distinguished Club Program and reviews attendance at club leader training.

For a full list of area director competencies, visit [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies).

## Area Director Resources

*Serving Clubs through Visits: A Guide for Area Directors* (Item 219)

[www.toastmasters.org/219](http://www.toastmasters.org/219)

*How to Build a Toastmasters Club* (Item 121)

[www.toastmasters.org/build](http://www.toastmasters.org/build)

*Club Leadership Handbook* (Item 1310)

[www.toastmasters.org/1310](http://www.toastmasters.org/1310)

*Toastmasters International District Recognition Program* (Item 1490)

[www.toastmasters.org/1490](http://www.toastmasters.org/1490)

*Distinguished Club Program and Club Success Plan* (Item 1111)

[www.toastmasters.org/1111](http://www.toastmasters.org/1111)

*Speech Contest Rulebook* (Item 1171)

[www.toastmasters.org/1171](http://www.toastmasters.org/1171)

*Training Club Leaders* (Item 217)

[www.toastmasters.org/217](http://www.toastmasters.org/217)

### Area Director's Club Visits

Make at least two club visits per club per year:

Assess club membership and its leadership's willingness to grow.

Determine who fulfills education achievements and when these are completed.

Submit the Area Director's Club Visit Report online.

### Area Progress

The area director participates in area director training provided by the district.

The area director reports regularly to the division director and district leaders on area progress.

If the number of clubs in the area falls to fewer than four or grows beyond six, the area director contacts district leaders immediately.

### Distinguished Programs

It is the area director's responsibility to motivate and assist each club in the area to become Distinguished.

### Area Speech Contests

As area director, you are responsible for coordinating area speech contests. You may ask the division director for assistance in planning these events.

## ADDITIONAL LEADERSHIP ROLES

Your district may have leadership roles in addition to those outlined on the previous pages. See **District Administrative Bylaws, Article VII: Officers**, (a) District Officers. Although fulfilling one of these roles does not allow a member to earn credit toward an education award and may not be logged in the member record, Toastmasters who accept these roles gain valuable experience.

The following includes notable leadership roles. Other leadership roles, such as committee chairs, are addressed in applicable sections of this handbook.

### Immediate Past District Director

The immediate past district director provides counsel and guidance to district leaders and plans, directs and organizes projects and committees as requested by the district director. One of the major responsibilities of this role is to ensure the incoming district director receives all pertinent district documents prior to June 30. Other responsibilities include serving as a member of the district executive committee and district council, upholding the bylaws and policies of Toastmasters International, encouraging dedicated members to accept leadership positions and helping the district achieve Distinguished recognition.

### Logistics Manager

The logistics manager selects meeting locations and organizes the room, ensuring the atmosphere is conducive to successful events, such as business meetings, speech contests and training. The logistics manager sets up necessary equipment, assists district leaders with meeting arrangements, distributes program materials, keeps track of district property and addresses disruptions during events. Proven abilities in organization and diplomacy are a must for this role.

### Webmaster

The webmaster assists the district director and club growth director with updates to the district website. Although the district director is the publisher of the district website and ultimately responsible for its content, the webmaster plays an important role in maintaining the website. This involves posting district announcements, removing outdated content and troubleshooting functionality issues. Members who typically excel in this role are Internet savvy and creative.

### Parliamentarian

The parliamentarian assists the district director with planning and conducting district meetings. Working with Toastmasters International, the responsibilities of the parliamentarian include interpreting Toastmasters bylaws and policies, reviewing district operating procedures as requested by the district director, and ensuring all meetings follow proper protocol. The parliamentarian is an invaluable resource for the district director, offering help, guidance and support during meetings and answering any questions the district director has related to rules and procedures. Members who assume this role must have a thorough understanding of *Robert's Rules of Order Newly Revised*.

### Parliamentarian Resource

Parliamentary procedure

<https://www.toastmasters.org/Parliamentary>



## REGION ADVISOR

The region advisor is responsible for supporting, coaching and mentoring district leaders in their efforts to fulfill the district mission. In doing so, a greater number of people are afforded the opportunity to benefit from the Toastmasters education program.

The region advisor role is a region-level leader and not a district-level leadership position. The region advisor coaches districts to success and helps district directors, program quality directors, club growth directors and public relations managers develop as leaders. The region advisor provides marketing support to district leaders and helps identify strategies that enable districts to extend the network of clubs and enhance club performance.

Regions with eight or fewer districts have one region advisor and regions with nine or more districts have two region advisors. See **Policy and Protocol, Policy 10.0: Region Advisors, Section 2.**

### REGION ADVISOR RESPONSIBILITIES

#### Marketing Objectives

The region advisor assists district leadership teams in the interpretation and planning of marketing objectives through district performance reports and the District Success Plan. This also includes aiding districts' club-building efforts, such as training in how to conduct corporate visits.

As region advisor, you must have a thorough understanding of club coach-, sponsor- and mentor-training materials in order to support districts in the development and training of these positions.

#### Operations

As region advisor, you guide your districts in issues related to district operations.

You work in partnership with district leaders to identify strengths and weaknesses.

#### District Leader Training

Region advisors conduct district leader training sessions at the International Convention and Mid-year Training.

#### Region Advisor Resources

Region Advisor Tools	<a href="http://www.toastmasters.org/ra">www.toastmasters.org/ra</a>
Region and District Map	<a href="http://www.toastmasters.org/regions">www.toastmasters.org/regions</a>
Region Advisor Tutorials	<a href="http://www.toastmasters.org/ratutorials">www.toastmasters.org/ratutorials</a>
Region Advisor Handbook	<a href="https://www.toastmasters.org/rahandbook">https://www.toastmasters.org/rahandbook</a>

# DISTRICT RECOGNITION

Each program year, Toastmasters International recognizes districts, divisions, areas and clubs in the achievement of Distinguished program goals. One of your duties as a district leader is to promote these programs. Earning recognition is based on performance, not on district size. There is no limit to the number of areas, divisions and districts that can achieve Distinguished, Select Distinguished and President's Distinguished recognition.

## THE DISTRICT SUCCESS PLAN

The District Success Plan is an extensive planning tool that the district leadership team completes at the beginning of each program year. The plan helps the district to evaluate current situations, establish specific goals and develop strategies that can be used to achieve success in the Distinguished District Program. The plan must be submitted to World Headquarters by **September 30**.

## POLICY AND PROTOCOL

**Protocol 3.0: Ethics and Conduct, 4. Recognition Program Violations, C**  
Districts shall not create, administer, or promote any other recognition programs which compete with official Toastmasters International recognition programs.

## DISTINGUISHED DISTRICT PROGRAM

The Distinguished District Program focuses on club quality and member satisfaction and recognizes districts that meet goals in growth and educational achievement through the support of their clubs. It is also a management tool to focus districts on increasing membership, forming new clubs and ensuring clubs are meeting the needs of their members. Learn more about the Distinguished District Program and the recognition requirements for areas, divisions and districts in the *Toastmasters International District Recognition Program* (Item 1490).

## Qualifying Requirements

A qualifying requirement is a prerequisite or prior condition for participation in the program. If a qualifying requirement is not met, Distinguished recognition may not be received.

To be considered for recognition, districts must meet two qualifying requirements:

1. They must submit the Division and Area Directors Training Report to World Headquarters by **September 30** showing that 85 percent of division and area directors were trained.
2. They must submit the District Success Plan to World Headquarters by **September 30**.

## DIVISION AND AREA DIRECTORS TRAINING REPORT

It is the responsibility of the district to see that area directors and division directors are given the appropriate training to make it possible for them to fulfill their duties to the clubs in the most effective manner possible. The program quality director completes the Division and Area Directors Training Report detailing the area and division directors trained. Conduct the training programs as early as possible in the Toastmasters year, but no later than **September 30**.

Districts that fulfill the qualifying requirements on the previous page and do the following are eligible for recognition at year-end:

ACHIEVEMENT	RECOGNITION EARNED
Three percent increase of membership payments base, three percent increase of club base and Distinguished clubs equal to at least 40 percent of the district's club base	<b>Distinguished District</b>
Five percent increase of membership payments base, five percent increase of club base and Distinguished clubs equal to at least 45 percent of the district's club base	<b>Select Distinguished District</b>
Eight percent increase of membership payments base, eight percent increase of club base and Distinguished clubs equal to at least 50 percent of the district's club base	<b>President's Distinguished District</b>

## TRACKING PROGRESS

A district's goals are established for the year based on its membership base and club base. These goals are reflected in reports available on the Toastmasters International website at [www.toastmasters.org/distinguishedperformancereports](http://www.toastmasters.org/distinguishedperformancereports).

## AWARDS

The rewards for districts that earn recognition are as follows:

	DISTINGUISHED DISTRICT	SELECT DISTINGUISHED DISTRICT	PRESIDENT'S DISTINGUISHED DISTRICT
Round-trip airfare (coach) to the International Convention for the district director			X
Single-room accommodation for two nights at the International Convention for the district director		X	X
One discounted registration to the International Convention for the district director	X	X	X
Complimentary admission to the Golden Gavel presentation for the district director and guest with special seating	X	X	X
Awards for the district director, program quality director and club growth director presented at the Hall of Fame	X	X	X
Patch for the district banner	X	X	X
Certificates to recognize those who contributed to the district's success	X	X	X



## ▲▲ DISTRICT EXCELLENCE AWARDS

The program quality directors of districts that meet Distinguished goals in training and number of Distinguished clubs receive the Excellence in Program Quality Award.

The club growth directors of districts that meet Distinguished goals in club and membership growth, receive the Excellence in Club Growth Award.

Districts that are Distinguished for three or more consecutive years are recognized with an Excellence in Leadership Award.

All of these awards are presented to recipients at the Toastmasters International Convention.

## DISTINGUISHED DIVISION PROGRAM

The Distinguished Division Program recognizes divisions that plan, set goals and achieve success. The program builds on club success and complements the goals that districts set to earn Distinguished recognition. Divisions may receive Distinguished, Select Distinguished or President's Distinguished recognition by meeting the goals outlined below. Division goals are established based on the number of clubs and areas in a division.

### Qualifying Requirements

Divisions with at least three areas are automatically contenders for Distinguished recognition.

To be considered for recognition, divisions must meet one qualifying requirement:

1. Divisions must have no net club loss.

ACHIEVEMENT	RECOGNITION EARNED
Distinguished clubs equal to at least 40 percent of the division's club base	<b>Distinguished Division</b>
Distinguished clubs equal to at least 45 percent of the division's club base	<b>Select Distinguished Division</b>
Distinguished clubs equal to at least 50 percent of the division's club base plus net club growth of one	<b>President's Distinguished Division</b>

## DISTINGUISHED AREA PROGRAM

The Distinguished Area Program recognizes areas that plan, set goals and achieve success. The program builds on club success and complements the goals that divisions and districts set to earn Distinguished recognition. Areas may receive Distinguished, Select Distinguished or President's Distinguished recognition by meeting specific goals. All goals are calculated using an area's club base.

## Qualifying Requirements

Areas with a club base of at least three are automatically contenders for Distinguished recognition. Keep in mind that an area's club base increases if April membership dues are paid after July 1.

To be considered for recognition, areas must meet two qualifying requirements:

1. Areas must have no net club loss.
2. Areas must submit the **Area Director's Club Visit Report** (Item 1471) for 75 percent of its club base for first-round visits by **November 30** and for 75 percent of its club base for second-round visits by **May 31**.

ACHIEVEMENT	RECOGNITION EARNED
Distinguished clubs equal to at least 50 percent of the area's club base	<b>Distinguished Area</b>
Distinguished clubs equal to at least 50 percent of the area's club base plus one more Distinguished club	<b>Select Distinguished Area</b>
Distinguished clubs equal to at least 50 percent of the area's club base plus one more Distinguished club and a net club growth of one	<b>President's Distinguished Area</b>

Read the *Toastmasters International District Recognition Program* (Item 1490) for additional information.

### District Recognition Program Resources

Division and Area Directors Training Report	<a href="http://www.toastmasters.org/districtcentral">www.toastmasters.org/districtcentral</a>
Recognizing district members for performance excellence	<a href="http://www.toastmasters.org/localrecognition">www.toastmasters.org/localrecognition</a>
Distinguished Performance Reports	<a href="http://www.toastmasters.org/distinguishedperformancereports">www.toastmasters.org/distinguishedperformancereports</a>

## DISTINGUISHED CLUB PROGRAM

The Distinguished Club Program consists of 10 goals for clubs to achieve during the program year. Toastmasters International tracks clubs' progress toward these goals throughout the year.

At year-end, Toastmasters International calculates the number of goals the clubs achieved and recognizes them as Distinguished clubs, Select Distinguished clubs or President's Distinguished clubs based on the goals achieved and the number of members they have.

## Qualifying Requirements

To be considered for recognition, clubs must either have 20 members or a net growth of at least five new members as of **June 30**. Transfer members do not count toward this total until their membership has been paid and is current in their new club.

Following are the goals that clubs should strive to achieve during the year:

### EDUCATION

#### Current Program

1. Two Competent Communicator (CC) awards
2. Two more CC awards
3. One Advanced Communicator Bronze (ACB), Advanced Communicator Silver (ACS) or Advanced Communicator Gold (ACG) award
4. One more ACB, ACS or ACG award
5. One Competent Leader (CL), Advanced Leader Bronze (ALB), Advanced Leader Silver (ALS) or Distinguished Toastmaster (DTM) award
6. One more CL, ALB ALS or DTM award

#### Toastmasters Pathways Learning Experience

- P1. Four members complete Level 1
- P2. Two members complete Level 2
- P3. Two more members complete Level 2
- P4. Two members complete Level 3
- P5. One member completes Level 4
- P6. One member completes Level 5

#### ALS CREDIT

To be eligible for this award, a member must have served a complete term as a district leader. A complete term is defined as having served at least from September 1 through June 30. Those assuming office after September 1 do not qualify as having served a full term.

### MEMBERSHIP

7. Four new members
8. Four more new members

### TRAINING

9. A minimum of four club officers trained during each of the two training periods\*

### ADMINISTRATION

10. On-time payment of membership dues accompanied by the names of eight members (at least three of whom must be renewing members) for one period and on-time submission of one club officer list\*

### ACHIEVEMENT

- |                   |
|-------------------|
| Five of 10 goals  |
| Seven of 10 goals |
| Nine of 10 goals  |

### RECOGNITION EARNED

- |                                |
|--------------------------------|
| Distinguished club             |
| Select Distinguished club      |
| President's Distinguished club |

\*For more information about Goals 9 and 10, please see the *Distinguished Club Program and Club Success Plan* (Item 1111).

Recognition reports are updated daily on the Toastmasters website. Encourage clubs to visit [www.toastmasters.org/distinguishedperformancereports](http://www.toastmasters.org/distinguishedperformancereports) to see their progress. Help them understand the reports so they can take advantage of this information.

Read the *Distinguished Club Program and Club Success Plan* for additional information.

## Distinguished Club Program Resources

*Distinguished Club Program and  
Club Success Plan (Item 1111)*

[www.toastmasters.org/1111](http://www.toastmasters.org/1111)

## RECOGNITION OUTSIDE THE DISTINGUISHED PROGRAMS

Districts may choose to recognize district leaders for Toastmasters accomplishments outside of the Distinguished program. However, because recognition programs that conflict with Toastmasters' recognition programs are not permitted, districts are discouraged from creating their own programs.

For guidance on offering district-level incentives to promote club and membership building, educational achievements or other progress in the Distinguished programs, contact [districts@toastmasters.org](mailto:districts@toastmasters.org).

## Recognition Resources

Awards and recognition items

[www.toastmasters.org/awards](http://www.toastmasters.org/awards)

Other recognition forms and requirements

[https://www.toastmasters.org/resources/  
local-recognition-checklist](https://www.toastmasters.org/resources/local-recognition-checklist)

### DISTRICT OUTSTANDING TOASTMASTER OF THE YEAR

This recognition is typically awarded to a Toastmaster who is not a district leader, but who makes a significant contribution to the goals and mission of the district.

### DIVISION DIRECTOR OF THE YEAR

The Division Director of the Year award is granted to the division director with the most outstanding performance in membership building and retention, club extension, education and training, leadership and other areas critical to district success.

### AREA DIRECTOR OF THE YEAR

The Area Director of the Year award is granted to the area director who makes the most outstanding contributions to district goal achievement.

# LEADERSHIP TRAINING



Providing effective training and leadership opportunities for club and district leaders is one of the district's primary responsibilities. Without properly trained leaders, clubs and districts cannot effectively meet members' needs or introduce the benefits of Toastmasters to others. Use all district meetings and events as training opportunities.

## **POLICY AND PROTOCOL**

### **Protocol 7.1: District Events, 3. Club Leader Training, E-F**

E. Districts only conduct training sessions focused on the training of club or district leaders and the achievement of the club or district mission.

F. Districts do not compete with for-profit enterprises that deliver training programs. District-sponsored training is available only to members and their guests. These events are not open to the general public nor used as fund-raising events.

Training for the district director, program quality director and club growth director is not the responsibility of the district; these leaders are trained by World Headquarters staff and the region advisors at August training and at Mid-year Training.

Include training for all district leaders in the district's training schedule. As part of district and club leader training, districts may include educational sessions on communication and leadership for all members. However, district funds may not be used to subsidize separate sessions for non-officers. See **Policy and Protocol, Protocol 7.1: District Events, 3. Club Leader Training, C.**



## **COLLABORATION**

At the initial district leader training in June, both the outgoing and incoming program quality directors are present. The event should be a collaboration between the program quality directors. The incoming program quality director focuses on learning from the outgoing leader. This is a good opportunity for the incoming and outgoing district teams to work together to ensure a smooth transition. The outgoing program quality director leads the event, while the incoming program quality director can use the opportunity to build rapport with the incoming team.

### **PROGRAM QUALITY COMMITTEE**

The district may have a program quality committee to help it achieve its education and training goals.

This group works with the program quality director. It helps to train district and club leaders and to achieve the district's goals for Distinguished clubs.

## Training Program Goals

- Apply the concepts of effective leadership.
- Give participants a practical understanding of their roles and responsibilities as district or club leaders.
- Provide the tools to achieve Distinguished club, Distinguished area, Distinguished division and Distinguished district status.
- Encourage planning, growth and member and club retention.
- Motivate participants to function together as a team.
- Encourage participants to read, review, and use the handbooks, manuals and other materials important to achieving success as a district or club leader.
- Answer questions and stimulate discussion.
- Give leaders a firm foundation for their term of office.

## RECOGNITION

Your district is encouraged to recognize individuals for participation in or completion of training. However, your district may not create any education awards, including degrees or diplomas, nor may it create awards or programs that certify individuals.

## PREPARATION

### PROGRAMS

Use Toastmasters International training programs. Determine the needs of your training participants based on district recognition goals. Then analyze your district's past performance, strengths and weaknesses. Develop a training program outline that incorporates the materials available on the Toastmasters International website at [www.toastmasters.org/districttraining](http://www.toastmasters.org/districttraining).

### PRESENTERS AND SESSION LEADERS

Select presenters carefully. Choose the best possible trainers, educators and motivators in the district. Notify presenters well in advance of the training sessions and involve them in the planning process. Keep presenters current on progress and provide them with materials ahead of time.

Prepare session leaders. Being a good session leader requires the same dedication that it takes to give a good speech. Experienced district leaders make some of the best trainers. Mastery of the session content is important for establishing credibility and making the learning experience relevant to participants. Seasoned Toastmasters are some of the most knowledgeable educators when it comes to leadership training. Look for highly motivated people interested in training.

Ask session leaders to review *From Speaker to Trainer* (Item 257). It is an excellent resource for presenters at leader training sessions. Use it during the preparation of all district training events.

### PROTOCOL 7.1

Ongoing training of division and area directors is conducted at district meetings, such as district executive committee meetings.

### TRAINING TIPS

- Select presenters carefully
- Use Toastmasters training programs
- Keep training sessions focused
- Begin and end on time
- Make appropriate physical arrangements
- Promote
- Prepare session leaders
- Get feedback

### CHARACTERISTICS OF SESSION LEADERS

- Knowledge of the subject
- Knowledge of teaching
- Desire and interest in training

### TRAINING ARRANGEMENTS

- Order supplies from World Headquarters and elsewhere at least six weeks in advance
- Print programs, handouts, and visual aids
- Coordinate set-up of tables, seating and audio-visual equipment

### ENCOURAGE FEEDBACK

- Did the content meet the needs of participants?
- Was the material useful?
- Was the presenter knowledgeable and well prepared?
- How can training be improved?
- What other topics should be covered?

## SESSIONS

Keep training sessions focused, but have some flexibility in order to meet the needs of each particular group of trainees.

Pay close attention to the training session schedule, and follow it so training starts and ends on time. When planning, allow time for discussion of important topics and exercises that allow participants to practice new skills. Leave enough time to address questions.

Training does not end when the session ends. Encourage participants to contact session leaders or district leaders if issues arise that cannot be adequately addressed during a training session. Urge participants to review appropriate handbooks and materials. The answers to most questions can be found in these valuable resources.

## ARRANGEMENTS

Make adequate arrangements. Select a date that does not conflict with important local events or holidays. Select and secure a location that provides a suitable training environment and appropriate accommodations for members with disabilities. Allow adequate time to complete your training agenda.

## PROMOTION

Promote, promote, promote! Promote early and often. Market club leader and district leader training to encourage maximum attendance and participation at these sessions. Use all available media (website, newsletter, fliers, telephone calls, etc.) to invite and urge leaders to attend training sessions. Emphasize the benefits of the training session for the individual. Such benefits include leadership development, skill building and personal growth.

## FEEDBACK

Get feedback. Feedback is critical to the success of trainees and the success of future training sessions. During each session, ask for feedback from participants to find out if they understand the material and if it is relevant to them.

Provide follow-up support during the year. Hold formal or informal review sessions at the district conference, executive committee meetings, division council meetings, area council meetings and other events.



## TRAINING DIVISION AND AREA DIRECTORS

Hold initial division director and area director training before the district year begins, as soon as division and area directors are elected or appointed to office. If this is not possible, hold initial training early in the district year, but no later than **September 30**.

Initial area director and division director training must be a minimum of four hours. Train the directors together in a central location. Geographically large districts may train area directors by division or group divisions together. One-to-one training should rarely occur.

As part of the Distinguished District Program, at least 85 percent of the district's area and division directors must be trained, and a Division and Area Directors Training Report, available on District Central, must be submitted to World Headquarters by **September 30**.

## Training Division and Area Directors Resources

Division and area director training materials

[www.toastmasters.org/trainingmaterials](http://www.toastmasters.org/trainingmaterials)

Division and Area Directors Training Report

[www.toastmasters.org/districtcentral](http://www.toastmasters.org/districtcentral)

## TRAINING CLUB LEADERS



One of the area director's responsibilities is to ensure club leaders in the area have access to training sessions conducted by the district that equip them to succeed during their terms of office. Club leaders are elected either annually or semiannually. Schedule club leadership training to accommodate these election schedules.

Districts train club leaders twice yearly: in June, July or August and in December, January or February. For clubs that elect annually, the second training gives club leaders the opportunity to discuss problems and get advice from district leaders. It is also a chance to network with leaders of other clubs. For clubs electing semiannually, this training allows new leaders to learn their roles and responsibilities and meet district leaders. See **Policy and Protocol, Protocol 7.1: District Events, 3. Club Leader Training, A.**

The way the training program is organized and administered varies from district to district. With your district leaders, determine what plans have been made for club officer training. In some districts it is conducted on a division level, coordinated by the division director and assisted by the area directors of that division. In other districts, the entire program is the responsibility of the area director. Whichever the case, encourage club leader participation in these programs.

Club leaders must be trained by authorized district representatives in a live training session. While audiovisual aids may be used to enhance training, they may not be the sole method of training. For example, club leaders who simply view a video that describes their responsibilities are not considered trained, even if a district leader provides the video.

### **POLICY AND PROTOCOL**

#### **Protocol 7.1: District Events, 3. Club Leader Training, B**

The Toastmasters Leadership Institute is the recommended method of club officer training. If the district chooses this format, it must conform to the guidelines published by Toastmasters International. The terms "university" and "college" shall not be used.

It is the responsibility of the district leaders to report, using the online system, which club leaders attend training to ensure that the club receives Distinguished club credit.

In order for clubs to receive credit, districts must record the training information online at the Toastmasters website by **November 30** for the June through August training period and by **May 31** for the December through February training period. Corrections and deletions may be made by email to [districts@toastmasters.org](mailto:districts@toastmasters.org) by these deadlines.

## Training Club Leaders Resources

Club officer training materials

<https://www.toastmasters.org/resources/resource-library>

*Training Club Leaders* (Item 217)

[www.toastmasters.org/217](http://www.toastmasters.org/217)

Club Officer Training Certificate  
(Item 521B)

[www.toastmasters.org/521B](http://www.toastmasters.org/521B)

# TOASTMASTERS EDUCATION PROGRAM

As program quality director, one of your primary concerns is to maintain the integrity of the Toastmasters education program in all clubs in the district. In order to do this, you must gain expertise in all aspects of the program, and thoroughly understand how all components of the program work together to help members develop their communication and leadership skills in a friendly environment.

## SPEECHES

All speeches that members present in their clubs should be from the projects in the Toastmasters educational programs. Because each speech project builds on the skills used in previous projects, it is recommended that members complete projects in consecutive order.

## SPECIAL MEETINGS FOR PREPARED SPEECHES

To allow the most speaking opportunities for members, clubs should meet weekly. If a club has a large number of members and has difficulty accommodating all those who want to speak at meetings, the club may occasionally conduct a special meeting devoted solely to speeches. These meetings are often called “speakathons,” “speech marathons” or “speakouts.” The only reason such meetings may be held is to help individual members improve speaking skills, and they may be organized only by a club. Districts, including areas and divisions, may not organize this type of meeting for clubs and clubs may not invite members from other clubs to participate in these meetings. Direct questions to [educationawards@toastmasters.org](mailto:educationawards@toastmasters.org).

## MEETING ROLES

As described in The Navigator, participation in club meeting roles helps members develop their leadership skills while simultaneously conducting regular club business. At club meetings you take on meeting roles. Each one adds value to your learning experience and helps you improve your communication and leadership skills. Below are brief descriptions of each to familiarize you with who does what at a meeting. If you are fulfilling a role at an upcoming meeting, read A Toastmaster Wears Many Hats (Item 1167DT) or visit [www.toastmasters.org/meetingroles](http://www.toastmasters.org/meetingroles) for more detailed information.

## CLUB LEADERSHIP

Encourage members to become club leaders. Serving as a club leader offers practical experience in planning, training, motivating and managing that is relevant both personally and professionally.

### Club Leadership Resources

Toastmasters Education Program [www.toastmasters.org/membereducation](http://www.toastmasters.org/membereducation)  
Pathways Learning Experience <https://www.toastmasters.org/pathways-overview>

### REQUIREMENTS OF SPECIAL MEETINGS FOR PREPARED SPEECHES

- Each speech is carefully prepared to allow the speaker to focus on the objective of the project
- All speeches are evaluated both in writing and verbally
- Each Toastmaster is limited to one speech at any meeting for credit

# FINANCIAL STRUCTURE AND PROCESS

## MANAGING DISTRICT FINANCES

The guide, *Managing District Finances* (Item 1307), is a comprehensive financial resource for district leaders. You can use the information in this guide to successfully manage the fiscal responsibilities of your district.

All district funds, regardless of their source, are Toastmasters International funds. These funds are to be used to carry out the mission of Toastmasters International and the mission of the district. Districts must use these funds to benefit the Toastmasters members within the district, and promote education, growth and development of membership and new clubs.

## BYLAWS OF TOASTMASTERS INTERNATIONAL

### Article XII: Districts, Section 2: How Financed

District expenses shall be paid, subject to the approval of the Board of Directors, out of Toastmasters International funds authorized by the Board for district activities and operations in accordance with district expense policies and procedures adopted by the Board. No district, area, or division officer shall receive a salary or other compensation, but may receive reimbursement for travel and other expenses incurred on behalf of Toastmasters International, as set forth in the district expense policies.



## FIDUCIARY RESPONSIBILITY

As the district director, you have fiduciary responsibility and are directly responsible for ensuring that the district is appropriately managing the funds that support its mission. The finance manager supports you in this endeavor by providing monthly profit and loss statements and a variety of other resources to help you understand and control how the district funds are being used. It is important that the district director, program quality director, club growth director and finance manager work together on finance and budgeting within the district.

Toastmasters **Policy and Protocol** regulate standards at all levels of the organization. Legal ramifications result if fraudulent, deceptive and falsifying activity transpires regarding financial management.

## THE DISTRICT RESERVE ACCOUNT

The portion of membership dues payments allotted to the district is held in an account maintained by World Headquarters called the District Reserve Account.

## Fiduciary Responsibility Resources

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)

*Managing District Finances: A Guide for District Leaders* (Item 1307)

[www.toastmasters.org/1307](http://www.toastmasters.org/1307)



## REVENUE

Districts receive 25 percent of every dollar World Headquarters receives on membership dues payments from clubs within the district.

The district receives a monthly statement detailing the 25 percent allotment and any disbursements for orders and funds requisitioned. The district director and finance manager can requisition these funds throughout the year, provided the district first meets certain reporting requirements.

## FUNDRAISING

Fundraising is a source of revenue districts can use to offset costs for educational sessions and to further the purpose of Toastmasters International. Revenue derived from fundraising can be used for the training of club and district leaders, for seminars or clinics connected with the Toastmasters education program, for the purchase of supplies and education program materials and to offset the cost of speakers at major events.

### Fundraising Activities

Toastmasters International is an educational organization and not a service club whose main focus is to raise funds for community or charitable causes. It is important that fundraising activities be conducted according to policy and protocol and not occur on a continuing basis. To do so would jeopardize the organization's tax status. This could lead to a substantial increase in membership dues. See **Policy and Protocol, Protocol 8.2: Fundraising, 1–2**.

### RALPH C. SMEDLEY MEMORIAL FUND®

Toastmasters International established the Ralph C. Smedley Memorial Fund® (Smedley Fund) in 1965 to advance the Toastmasters International mission through the research, development and distribution of educational programs and materials relating to communication and leadership.

#### POLICY AND PROTOCOL

##### Policy 8.5: Ralph C. Smedley Memorial Fund® 1

Toastmasters International is a 501(c)(3) nonprofit organization, but it does not generally solicit or accept charitable contributions for the general, unrestricted support of the organization. The Ralph C. Smedley Memorial Fund® (Smedley Fund), which is a part of Toastmasters International, is the only permanently-established repository for charitable contributions to the organization, and it has restricted purposes. Only the Board of Directors has the authority to approve the creation of additional funds, from time to time, for the receipt of charitable contributions for specific purposes.

### Smedley Fund Resources

For more information about the Smedley Fund, please visit <http://www.toastmasters.org/smedley>

For questions about the Smedley Fund, please contact [smedleyfund@toastmasters.org](mailto:smedleyfund@toastmasters.org)

## BUDGETING

The funds allotted to your district must be used for the benefit of the district and its mission. To ensure district funds are used appropriately, district leaders prepare a budget at the beginning of the year that describes how funds are allocated. The budget includes estimates of the income available and the expected expenditures for the district year.

### DISTRICT FINANCE SECTION OF THE WEBSITE

The District Finance section of the Toastmasters International website guides the district step by step in creating the district budget. All the necessary forms and spreadsheets are located on the District Finance section pages.

The tools necessary to complete the district budget are in the District Finance section of the website. Estimate your district's non-membership revenue for the year. Toastmasters International will provide your district with its estimated membership revenue. Take into consideration all district events expected to generate funds. Keep estimates realistic and conservative.

Districts often budget for the same activities that were funded the previous year. This is not always wise. Review your district's priorities every year. Keep the focus on funding activities that help the district become Distinguished.

Once your goals and priorities are defined, put district financial resources behind those priorities. Refrain from allocating a lump sum of money to divisions, areas and so on. Financially support specific activities that result in membership growth and retention, new clubs and education achievements. Remember that division, area and conference accounts are district accounts. As such, they must be reviewed by the district and included in detail on the profit and loss statements.

To guide your district as it prepares a budget, the Toastmasters International Board of Directors prepared the following prioritized list of items for which district funds may be used:

#### **POLICY AND PROTOCOL**

##### **Protocol 8.4: District Fiscal Management, 1. District Funds, A**

In order of priority, district funds are used for district and club leader training, club growth and retention, supporting clubs in their membership growth efforts, the promotion of Toastmasters International educational programs within clubs, district communications, administrative materials, awards and recognition items, district leader travel, district meetings, and speech contests conducted by the district.

When preparing a budget and allocating funds, treat the first item on this list as the most important compared to the others. Then, consider the second item on the list for funding before the remaining items and so on. This does not mean that items at the beginning of the list should receive more funds than items at the end of the list. Instead, strive to provide sufficient funds for higher-priority items. If financial resources are limited, give items at the beginning of the list top priority for full funding compared to the remaining items. For example, your district may not need to spend as much money on training as on district communications. However, if you must cut expenditures due to limited funding, then it is appropriate to fund training fully and decrease the amount spent on district newsletters and other items of lower priority.

## POLICY AND PROTOCOL

### Protocol 8.4: District Fiscal Management, 5. District Budget, F

District budget expenses shall be limited as follows:

CATEGORY	LIMIT
Marketing	no budget limit
Communication and public relations	maximum 25 percent of total budget
Education and training	maximum 30 percent of total budget
Speech contest	maximum 10 percent of total budget
Administration	maximum 20 percent of total budget
Travel	maximum 30 percent of total budget
Other	maximum 10 percent of total budget
Conference	no budget limit*
District store	no budget limit*
Fundraising	no budget limit**

\*This category should break even.

\*\*Fundraising revenue should exceed expenses.

Districts may request a one-year increase in the maximum limit for travel. The Chief Executive Officer will only approve the request if it is determined that the increase is the best solution to support the district mission.

The sum total of all categories cannot exceed 100 percent. The district must determine appropriate percentages for each category.

As you prepare the budget, remember that district funds may never be used for the payment of charter fees or membership dues. See **Policy and Protocol, Policy 8.0: Dues and Fees, 8**.

## BUDGET APPROVAL PROCESS

The budget must be approved by Toastmasters International and subsequently by the district council during the first district council meeting.

The district executive committee reviews the budget to ensure that it meets the requirements described previously. Once the committee is confident that the budget meets policy, it sends the budget to Toastmasters International by **September 30**.

Be sure to submit the budget on the form provided by Toastmasters International. A complete budget includes narratives and appropriate signatures.

Toastmasters International reviews the budget to make sure it conforms to policy. If the budget is not in compliance, Toastmasters International contacts the district with instructions to modify it.

The council members then vote to approve the budget during the district council meeting. If the council does not approve the budget, the district executive committee reconvenes to change it. If the changes are minor, the chair of the district council may poll the district executive committee during the meeting to see if the committee could quickly revise the budget before the council adjourns. If the changes are not minor or the district executive committee does not agree to them, the district executive committee must meet again later to work out an acceptable budget.

The committee then presents this second, amended budget to the district council, which votes on it by email.

The budget is an estimate, and occasionally the district may find that it did not allocate enough funds for a particular category, or allocated too much. Once approved by the district council, budgets cannot be changed, but the district can explain reasonable budget variances in its reports to the council via narratives.

### Budgeting Resources

District Finance	<a href="http://www.toastmasters.org/districtfinance">www.toastmasters.org/districtfinance</a>
Budgeting questions	<a href="mailto:districtfinancialquestions@toastmasters.org">districtfinancialquestions@toastmasters.org</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>

## USING THE DISTRICT BUDGET



### DISTRICT FINANCIAL CONTROLS

Because district funds (including area, division and conference funds) are Toastmasters International funds, your district must apply financial controls to ensure proper stewardship of these funds. For example, the estimated district budget must be signed by the district director, program quality director, club growth director and finance manager. District checks must be signed by the district director and finance manager. Checks made payable to the district director or finance manager must be signed or approved in advance in writing by the program quality director or club growth director. Alternate signers are permissible only if approved by the Toastmasters International Executive Committee. See **Policy and Protocol, Protocol 8.4: District Fiscal Management**, 4. Financial Controls, A–B.



### Approvals

All expense reimbursement claims must be approved by the district director or, in the case that the claim is the district director's, approval must come from the program quality director or club growth director. Any expenditure greater than \$500 must be authorized in advance and in writing by the district director and either the program quality director or club growth director, in consultation with the finance manager.

### Receipts

Itemized point-of-sale receipts are required for all reimbursements. Credit card statements and bank statements are not receipts. When no receipt is available, a detailed explanation of the expenditure is required to be considered for reimbursement. Mileage reimbursements require supporting documents consisting of the travel date, distance and travel purpose. See **Policy and Protocol, Protocol 8.4: District Fiscal Management**, 4. Financial Controls, H–I.

## Compensation

District leaders may not receive a salary or any other compensation. Expenses incurred for the benefit of the organization may be reimbursed only to the extent provided for in the district budget. See **District Administrative Bylaws, Article VII: Officers**, (h) Compensation.

## Other District Expenses

At times, districts may incur non-routine expenses that must be appropriately managed to protect Toastmasters International's tax-exempt status. As such, expenses for personal gifts must never be lavish or excessive and must relate to activities that directly support the organization's mission. Examples of acceptable personal gifts include thank-you cards, Toastmasters gift certificates and Toastmasters products. See **Policy and Protocol, Protocol 8.4: District Fiscal Management**, 8.

## Profit and Loss Statements

Finance managers provide monthly reports showing variances with explanations to the district director, program quality director and club growth director within 30 days of the end of the month. The profit and loss statements also must be provided at each district executive committee and district council meeting. See **Policy and Protocol, Protocol 8.4: District Fiscal Management**, 4. Financial Controls, D-E.



## Bank Signatories

The district director, either the program quality director or club growth director, and finance manager may jointly establish district bank accounts and shall have signatory authority on all accounts established by the district and those established on behalf of the district by Toastmasters International, including any division, area and conference accounts. Alternate signers are permissible only if approved by the Toastmasters International Executive Committee. See **Policy and Protocol, Policy 8.4: District Fiscal Management**, 3.

### **POLICY AND PROTOCOL**

#### **Policy 11.4: Board of Directors Committees, 1. Executive Committee, H**

All signatories on Toastmasters International's corporate bank accounts, including district bank accounts, must be approved by the Executive Committee, or by unanimous written consent.

- I. At an Executive Committee meeting, or by unanimous written consent, the committee reviews and approves a list showing, for each account, the district involved, the name and location of the financial institution, and the names of the persons to be added or removed as signatories since the prior committee meeting.
- II. If necessary, the International President approves the addition or removal of bank signatories between Executive Committee meetings, subject to ratification by the committee at its subsequent meeting.
- III. Replacement of a previously approved signatory is not effective until the replacement is approved by the International President, whose approval is subject to ratification by the Executive Committee.

## ▲▲ ACCOUNT STATEMENTS FROM WORLD HEADQUARTERS

Each month World Headquarters sends the finance manager and district director a District Reserve Account statement showing available funds held by Toastmasters International for the district's use.

## ▲▲ REQUISITIONING FUNDS

Your district may withdraw funds and place district orders from its reserve account throughout the year provided the district is in good standing with the reporting requirements.

Following is a list of all required reports and their due dates:

ITEM	DATE
District Leader List	July 15
District Signature Form and bank signatory card	July 15
Officer Agreement and Release Statement	July 15
District calendar	July 15
Year-end Audit Report and related financial records (from preceding administrative year)	August 31
District Success Plan*	September 30
Division and Area Directors Training Report*	September 30
District budget	September 30
Quarter 1 Profit and Loss Statement (for period of July 1 through September 30)	October 31
Mid-year Audit Report (for period of July 1 through December 31) and related financial records	February 15
Quarter 3 Profit and Loss Statement (for period of January 1 through March 31)	April 30

\*Qualifying Requirements for the Distinguished District Program

See **Policy and Protocol, Protocol 8.4: District Fiscal Management**, 3. District Reserve Account, B.

Withdrawals from the district reserve must be made on the standard requisition form available in the District Finance section of the Toastmasters website. Both the district director and finance manager must sign the form. Toastmasters International cannot honor district requisitions for amounts that exceed the total in the reserve account.

Submit requisitions at 30- to 60-day intervals to cover expenses incurred or estimated needs for the near future, and allow three to five business days for processing. Checks are made payable to the district and sent to the district director. Toastmasters International can send funds via wire transfer upon request. There is a \$25 charge for this service.

### DISTRICT RESERVE ACCOUNT STATEMENTS

- The balance at the beginning of the month
- Credits to the district's account allocated from membership payments made by clubs
- Charges deducted from the account for funds requisitioned by the district during the month
- Charges deducted for purchases charged by the district
- The balance at the end of the month

## **POLICY AND PROTOCOL**

### **Protocol 8.4: District Fiscal Management, 3. District Reserve Account, A**

During the final months of the program year, the district reserve account balance shall remain equal to or greater than 25% of that district's membership-dues income for the prior year.

Maintaining at least 25 percent of the district's membership dues income toward the end of the year ensures the incoming team has funds necessary to carry out its duties. Toastmasters International limits withdrawals as year-end approaches, so that on **June 30** this amount is in the District Reserve Account.

## **Charging Purchases to the District Account**

The district director must approve all orders for supplies and materials to be charged to the District Reserve Account. The district director may place orders through District Central on the Toastmasters website. Orders submitted without the district director's written approval and telephone orders from other district leaders cannot be charged to the district account. Also, if district reporting requirements are not met, district orders will not be processed.

## **CONFLICTS OF INTEREST**

Occasionally, a district may encounter a conflict of interest. For instance, the district may consider obtaining goods or services from a district leader or from a company with which the district leader or district leader's relative is affiliated. Sometimes this can be beneficial to the district; in other cases, the transaction can appear improper.

## **POLICY AND PROTOCOL**

### **Policy 7.2: District Management, 2. District Conflict of Interest, C–J**

- C. A potential conflict of interest occurs if a district contemplates a material financial transaction between the district and a district officer, or between the district and a person or company with which a district officer is affiliated.
  - I. A material financial transaction is defined as a total of more than \$100, or equivalent, within the district's annual budget year.
  - II. A person is considered affiliated if the district officer is related to the person by blood, adoption, or marriage.
  - III. A company is considered affiliated if the district officer (or a relative of the district officer) is a director, officer, employee or agent of the company or owns one percent or more of the value of the company.
- D. A district officer involved in such a transaction must abstain from voting or participating in any district decision regarding that transaction. Such district officer may only present the proposed transaction to the district and respond to questions.
- E. The district may engage in such a transaction if each district officer involved discloses to the district executive committee, prior to the transaction, all relevant facts concerning the transaction including the district officer's affiliation with the parties involved in the transaction.
- F. The district executive committee reviews the relevant facts.

- G. The transaction is approved only if a majority of the district executive committee concludes that the proposed transaction is fair and reasonable; for the purpose and benefit of the district; not for the excess benefit of the district officer involved nor for the benefit of the person or company affiliated with the district officer; and the most beneficial arrangement that the district could obtain under the circumstances with reasonable effort.
- H. The district council may approve the transaction instead of the district executive committee, following the same procedure.
- I. The minutes of a meeting at which such a transaction is considered records the matters discussed and the voting results.
- J. Certain transactions shall not be approved, including the lending of the district's money, the guarantee or extension of the district's credit and funds for the personal use or benefit of the recipient.

### **DIVISION ACCOUNTS**

If authorized by the district and included as part of the district budget and profit and loss statements, a division may be allocated funds and have its own division budget. Although a division may have its own budget, the district director must supervise the bank account activities and include them in the monthly profit and loss statements submitted to World Headquarters.

Because the funds in division bank accounts are district and Toastmasters International funds, these accounts must have the district director, finance manager and either the program quality director or club growth director as signatories. Alternate signers are allowed only if approved by the Toastmasters International Executive Committee.

All division account activities are subject to the same policies as district account activities.

### **TRAVEL REIMBURSEMENT**

Any travel reimbursement for district leaders must be included in the district budget and approved by the district council. In the event a district leader moves out of the geographic boundaries of the district from which he or she was elected, reimbursement must be based on either the residence of the leader at the time of election or the leader's current residence, whichever is less.

If included as part of the district budget and approved by the district council, a district may reimburse registration and lodging expenses for travel outside the district as follows:

	MID-YEAR TRAINING (IF NOT PROVIDED BY WORLD HEADQUARTERS)	INTERNATIONAL CONVENTION (IF NOT PROVIDED BY WORLD HEADQUARTERS)
District director	X	X
Program quality director	X	X
Club growth director	X	X
Immediate past district director		X

Travel expenses may include round-trip transportation between home and the event location, registration and admission to any ticketed events that are part of the conference or convention. Lodging may include only the cost of a hotel guestroom and related taxes; it excludes personal telephone or other incidental expenses. Travel expenses also exclude car rentals and gasoline.

### Using the District Budget Resources

Forms	<a href="http://www.toastmasters.org/formlibrary">www.toastmasters.org/formlibrary</a>
District Finance	<a href="http://www.toastmasters.org/districtfinance">www.toastmasters.org/districtfinance</a>
Questions about placing online supply orders	<a href="mailto:supplyorders@toastmasters.org">supplyorders@toastmasters.org</a>
Funds requests	<a href="mailto:requisitionforfunds@toastmasters.org">requisitionforfunds@toastmasters.org</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
<i>Managing District Finances: A Guide for District Leaders</i> (Item 1307)	<a href="http://www.toastmasters.org/1307">www.toastmasters.org/1307</a>
District Leader Tutorials	<a href="http://www.toastmasters.org/districttutorials">www.toastmasters.org/districttutorials</a>

## DISTRICT ASSETS

Districts may only own or rent assets necessary to facilitate the Toastmasters program. District assets are the property of Toastmasters International. See **District Administrative Bylaws, Article III: Affiliation and Liability, (b)**.

Each district and club must maintain a written list of its assets and a written procedure to account for and smoothly transfer the assets to the next administration.

Following are examples of acceptable and unacceptable district assets:

ACCEPTABLE DISTRICT ASSETS	UNACCEPTABLE DISTRICT ASSETS
Bank accounts	Motor vehicles
Electronic equipment	Office space
Office supplies	Real property
Lecterns	Furniture
Banners	Telephones
Timing lights	
Audiovisual equipment	
Educational materials	

See **Policy and Protocol, Protocol 8.1: Club and District Assets**.

## AUDITS

The district's financial transactions are reviewed twice during the year and account for all district revenue and expenses. All district bank accounts and funds must be included in the district budget and audits, including any accounts held at the division, area and conference level. All outstanding liabilities and obligations must be recorded as part of the Mid-year and Year-end audits.



## AUDIT COMMITTEE

The audit committee is appointed by the district director and is composed of at least three Toastmasters members who are not members of the district executive committee. Led by the audit chair, the committee confirms that district funds were spent appropriately.

## DISTRICT ADMINISTRATIVE BYLAWS

### Article XI: Committees, (c) Audit Committee

Each year the district director shall appoint an audit committee consisting of at least three individual members who are not members of the district executive committee. The reports of this committee shall contain information in the format required by Toastmasters International. The committee shall submit an interim Mid-year Audit Report no later than **February 15**. The committee shall then complete a Year-end Audit Report for the fiscal year ending June 30. The outgoing and incoming district directors are jointly responsible for submitting this report to the member clubs and to World Headquarters by **August 31**.

Following is a timeline with audit due dates:

<b>Between July 1 and November 1</b>	The district director appoints a district audit committee for the Mid-year Audit.
<b>Between January 1 and February 15</b>	The finance manager provides the Mid-year Audit Report for the period of July 1 through December 31 to the district audit committee, which presents the report to the district executive committee for approval.
<b>February 15</b>	Once approved, the audit committee or finance manager submits the Mid-year Audit Report and financial records to World Headquarters.
<b>Between March 1 and June 1</b>	At the district council meeting, the district executive committee presents the Mid-year Audit Report.
<b>Between July 1 and August 31</b>	The finance manager provides the Year-end Audit Report for the period of July 1 to June 30 to the district audit committee, which presents the report to the district executive committee for approval.
<b>August 31</b>	Once approved, the audit committee or finance manager submits the Year-end Audit Report and financial records to World Headquarters.
<b>Between August 1 and September 30</b>	At the district council meeting, the district executive committee presents the district audit for the prior twelve months ending June 30.

See *Policy and Protocol, Protocol 8.4: District Fiscal Management*. 6. District Audit, A–E.

## POLICY AND PROTOCOL

### Protocol 8.4: District Fiscal Management, 6. District Audit, G

The district executive committee provides copies of the audit prior to or at the district council meeting.

### Audit Resources

District Finance

[www.toastmasters.org/districtfinance](http://www.toastmasters.org/districtfinance)

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)

*Managing District Finances: A Guide for District Leaders* (Item 1307)

[www.toastmasters.org/1307](http://www.toastmasters.org/1307)

## FUNDRAISING AND TAXES

Clubs, areas, divisions and districts may conduct fundraising activities to offset the costs of educational sessions and to further the purpose of Toastmasters International, provided that certain guidelines are met. See **Policy and Protocol, Protocol 8.2: Fundraising**, 1-2.

Districts are not required to file taxes and should not do so. Districts are part of Toastmasters International and are consolidated with World Headquarters for tax reporting purposes. It is the responsibility of the individual clubs to determine the tax filing or other legal requirements in their city, state, province and/or country, and to file proper forms as appropriate. Failure to comply with tax or other legal requirements may result in the revocation of a club's charter. See **Policy and Protocol, Protocol 8.2: Fundraising**, 3.

### Tax Resources

Governing documents

[www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)

Tax Deductions for U.S. Toastmasters

[www.toastmasters.org/taxdeductionsUS](http://www.toastmasters.org/taxdeductionsUS)

Tax questions

[irsquestions@toastmasters.org](mailto:irsquestions@toastmasters.org)

# CLUB AND MEMBERSHIP GROWTH

- ▲ The district's mission is to build new clubs and support all clubs in achieving excellence. Districts should strive to have a three- to eight-percent net increase of clubs and membership payments each year to become Distinguished or better.

The club growth director and the chair of the club extension committee coordinate club-building efforts within the district, but any member can participate in the club growth process.

## Preparation for building and supporting new clubs

In order to manage your time effectively and meet district goals, establishing a district marketing team is important. By setting up a team, it will help you execute the many duties and responsibilities assigned to you as the club growth director. To further support you in your role, Toastmasters International provides each district with the Toastmasters Lead Management (TLM) system, which is a platform where all district leads are processed, tracked and managed by you and your respective team. Ensure that you are set-up in the TLM system once you receive the invitation (emailed to you by July 1). In addition to this handbook, there is a *Club Growth Director Handbook* (Item 110) that provides more information about club building and the duties of the club growth director.

### Preparation Resources

*Club Growth Director Handbook* (Item 110)

[www.toastmasters.org/110](http://www.toastmasters.org/110)

*How to Build a Toastmasters Club* (Item 121)

[www.toastmasters.org/build](http://www.toastmasters.org/build)

Optional: District Marketing Team Overview

[www.toastmasters.org/districtmarketingteam](http://www.toastmasters.org/districtmarketingteam)

Optional: District Marketing Team Resources

<https://www.toastmasters.org/leadership-central/district-leader-tools/training/club-sponsor-mentor-and-coach-training>

## ▲▲ BUILD NEW CLUBS

One of the most stimulating and rewarding ways to introduce the benefits of Toastmasters membership to others is by organizing new clubs in your district. This offers more people the opportunity to benefit from the Toastmasters education program. Organizing new clubs also provides district officers with an opportunity to develop and extend their own leadership skills. Reference the following sections to better understand how to build new clubs.

## Lead Generation

World Headquarters regularly receives inquiries from individuals interested in establishing a club and the club growth director receives this information through the TLM system. Aside from the leads you may receive through the TLM system, use the following steps as a guide to generate additional leads to build new clubs.

1. Consider communities, corporations or other large organizations within your area as potential club sponsors.
2. Determine how each lead could benefit from a Toastmasters program.
3. Research each lead and customize the answer based on the information you gather, explaining how Toastmasters can fill the community or company's specific needs.
4. Ask local Toastmasters if they have any contacts at the identified lead. If possible, try to secure the approval of high-level officials within the organization, such as the chief executive officer, human resources director or training manager.
5. If the lead is a corporation, reference the Corporate Sponsors List to find out if they have already established a Toastmasters club in order to help with your initial contact.

### Lead Generation Resources

Corporate Sponsors List

[www.toastmasters.org/corporatesponsors](http://www.toastmasters.org/corporatesponsors)

## Initial Contact

After you've done the research and acquired all information, send an email introducing yourself to the contact person. In it, offer brief information about Toastmasters and advise that you will follow up with a phone call. Within a few days, phone the contact person to schedule an introductory meeting.

In the call, quickly explain that you would like to meet to introduce yourself, discuss the value of the Toastmasters program, how it can benefit them and explain how simple it is to get started.

### Initial Contact Resources

*How to Build a Toastmasters Club* (Item 121)

[www.toastmasters.org/build](http://www.toastmasters.org/build)

*Club Growth Director Handbook* (Item 110)

[www.toastmasters.org/110](http://www.toastmasters.org/110)

*Initial Contact Email Template*

[www.toastmasters.org/initialemail](http://www.toastmasters.org/initialemail)

*Initial Contact Phone Script*

[www.toastmasters.org/initialphone](http://www.toastmasters.org/initialphone)

*Cold-Calling Script*

<https://www.toastmasters.org/resources/club-growth-director-introductory-resources>

### CLUB SPONSOR

A club sponsor guides the new group through the chartering process. Once the club is chartered, the job of the club sponsor is complete. Club sponsors are eligible to receive club-building credit toward the Advanced Leader Silver award.

## The Introduction Meeting

Make the most of your meeting with the potential community or corporate sponsor. Use this meeting to ask questions and identify any specific needs. Prepare to share examples of how Toastmasters can fulfill the community or organization's needs and use the Features, Benefits and Value chart to illustrate your points. You can also use the

## CLUB MENTORS

Be sure to find club mentors for the new group. A club mentor is an experienced member who advises the group for six months to a year. Club Mentors may join the new group as charter members. Club Mentors serving six months or more are eligible to receive club-building credit for the Advanced Leader Silver award and should be reported to World Headquarters.

Introductory Meeting Presentation and customize it to guide your meeting discussion. Ask for the contact person's support in forming the new club and then work with your district marketing team to assign club sponsors to help with the demonstration meeting. Once you have the demonstration meeting confirmed, this lead is then considered qualified.

### The Introduction Meeting Resources

<i>How to Build a Toastmasters Club</i> (Item 121)	<a href="http://www.toastmasters.org/build">www.toastmasters.org/build</a>
<i>Club Growth Director Handbook</i> (Item 110)	<a href="http://www.toastmasters.org/110">www.toastmasters.org/110</a>
Develop Your Leaders From Within (Item 103)	<a href="http://www.toastmasters.org/103">www.toastmasters.org/103</a>
Features, Benefits and Value	<a href="http://www.toastmasters.org/fbvchart">www.toastmasters.org/fbvchart</a>
Introductory meeting presentation template	<a href="http://www.toastmasters.org/corporatepresentation">www.toastmasters.org/corporatepresentation</a>

### The Demonstration Meeting

After you've conducted an introduction meeting, work with the club sponsor(s) and other experienced Toastmasters to schedule and conduct the demonstration meeting(s). For corporate club opportunities, ask your corporate contact to invite all employees to attend. Use this meeting to highlight the Toastmasters experience, show how Toastmasters will meet their identified needs, answer questions and distribute materials. Your purpose is to demonstrate how Toastmasters works and establish a plan. The objective is to get the qualified lead to start the Charter Process. Usually, meetings like this produce several potential members who decide they'd like to learn more.

Even if the demonstration meeting does not result in the immediate charter of a new club, keep in touch with the group. You may have a chance to start a new club with the group in the future.

### The Demonstration Meeting Resources

<i>How to Build a Toastmasters Club</i> (Item 121)	<a href="http://www.toastmasters.org/build">www.toastmasters.org/build</a>
<i>Club Growth Director Handbook</i> (Item 110)	<a href="http://www.toastmasters.org/110">www.toastmasters.org/110</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>
Corporate relations questions	<a href="mailto:corporaterelations@toastmasters.org">corporaterelations@toastmasters.org</a>

### The Charter Process

If a club decides to charter, complete the **Application to Organize a Toastmasters Club** during the charter or demonstration meeting and request the charter fee. Send the **Application to Organize a Toastmasters Club** and the charter fee to World Headquarters so the prospective club can receive their Charter Kit. At this point, the opportunity is now considered a prospective club until all remaining charter paperwork and fees are successfully processed. New members are responsible for the cost

of their new member fee in order to gain access to the education program once the club is chartered, unless the club is sponsored and the sponsoring organization covers the cost.

As members join, their membership dues payments should be collected. As soon as a minimum of 20 members is established, at least 17 of whom are non-dual members (except in advanced clubs), the club adopts the **Club Constitution for Clubs of Toastmasters International** and the Addendum of standard club options. The club elects leaders, and applies for a charter by submitting all charter forms and the appropriate money. Most clubs are able to complete all chartering requirements within four months of submitting the **Application to Organize a Toastmasters Club**. Once the club is officially chartered, make sure a club mentor is assigned and begins holding regular meetings that follow the Toastmasters club program.

For the complete Charter Process and necessary forms, make sure to reference the **How to Build a Toastmasters Club**.

### The Charter Process Resources

<i>How to Build a Toastmasters Club</i> (Item 121)	<a href="http://www.toastmasters.org/build">www.toastmasters.org/build</a>
Charter questions	<a href="mailto:newclubs@toastmasters.org">newclubs@toastmasters.org</a>
<i>Membership Growth</i>	<a href="http://www.toastmasters.org/1159">www.toastmasters.org/1159</a>

## SUPPORT ALL CLUBS

The district mission includes supporting all clubs in achieving excellence. The district supports all clubs, from newly chartered to long-standing.

### ATTRACTING AND RETAINING MEMBERS

Attracting new members to Toastmasters and retaining existing members means that more people are learning the vital skills of communication and leadership. Your district's role is to promote both membership and retention.

Membership-building and retention are club functions. People join clubs—they don't join areas, divisions or districts. Districts support clubs by providing the motivation, support, resources and public relations assistance necessary to help attract and retain members.

### PROVIDING THE RIGHT RESOURCES

Recognizing a struggling club or a club not on track to be distinguished is an opportunity for the district to step in and offer appropriate resources. Depending on what the club's current needs are, direct them to available resources like **The Successful Club Series**, **The Club Coach Program** and **Membership Growth Manual**.

### QUALITY CLUB MEETINGS

Members join Toastmasters to become more effective communicators and leaders. People stay in Toastmasters because the club meets their individual needs. A quality

club environment is the single most important factor in membership retention. Quality clubs provide the greatest opportunity for each member to develop communication and leadership skills.

You can support clubs to achieve quality club meetings by encouraging each club to conduct **Moments of Truth** and to read **Master Your Meetings**. These resources are significant in providing clubs with guidelines to achieve quality club meeting success.

CLUB SCENARIO	CLUB RESOURCE TO OFFER	RESOURCE URL
Would like to assess the quality and circumstance of the club	Moments of Truth (Item 290)	<a href="https://www.toastmasters.org/290">https://www.toastmasters.org/290</a>
	Successful Club Series Set (Item 280)	<a href="https://www.toastmasters.org/Shop/Education/programs-and-modules/the-successful-club-series/289--The-Successful-Club-Series">https://www.toastmasters.org/Shop/Education/programs-and-modules/the-successful-club-series/289--The-Successful-Club-Series</a>
Would like to have more than 12 active members	Club Coach Program	<a href="https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Club-Management/Club-Quality/Club-Coach-Program">https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Club-Management/Club-Quality/Club-Coach-Program</a>
Would like to attract and add new members	Membership Growth Manual (Item 1159)	<a href="http://www.toastmasters.org/1159">www.toastmasters.org/1159</a>
	Additional Membership-building Resources	<a href="https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Membership-Building">https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Membership-Building</a>
Would like to improve member engagement and participation	Master Your Meetings (Item 1312)	<a href="http://www.toastmasters.org/1312">www.toastmasters.org/1312</a>
	Additional Club Quality Resources	<a href="https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Club-Management/Club-Quality">https://www.toastmasters.org/Leadership-Central/Club-Officer-Tools/Club-Management/Club-Quality</a>

## Resource Matrix

### Quality Club Meeting Resources

*How to Build a Toastmasters Club* (Item 121) [www.toastmasters.org/build](http://www.toastmasters.org/build)

## CLUB MAINTENANCE

The purpose of a Toastmasters club is to provide a positive environment in which members can participate in the Toastmasters education program. Active participation is necessary if members are to learn and if clubs are to fulfill this purpose. All clubs must meet the following minimum requirements:

### POLICY AND PROTOCOL

#### Policy 2.0: Club and Membership Eligibility, 2. Club Minimum Requirements

- A. Meetings are held at least 12 times per year.
- B. Regular meetings are conducted in-person, except when a club decides to allow a minority of its members to attend online, or when a club has chartered as an online club in which all members may attend online.
- C. Members work toward educational achievements.
- D. Members give oral manual speeches and evaluations.
- E. Members have the opportunity to develop and practice leadership skills and earn leadership awards.

## Membership-renewal Dues

World Headquarters emails membership-renewal dues notifications to club leaders in August and in February. Clubs renew online. Area directors, follow up with each club to promote timely renewal submission. As district leaders, identify clubs having membership problems so you can offer assistance.

When membership-renewal dues are submitted on time, everyone benefits. The district receives a portion of each membership-renewal dues payment a club submits. Clubs receive credit toward one of the goals in the Distinguished Club Program. And most importantly, members continue to enjoy the benefits Toastmasters offers.

If club leaders do not submit renewal dues by October 1 and April 1, then the dues are not on time. These dues cannot be considered for credit toward Goal 10 in the Distinguished Club Program.

### POLICY AND PROTOCOL

#### Policy 8.0: Dues and Fees, 8

Club charter fees and membership dues and fees are paid by that club or an appropriate sponsoring agency, company or group and not from district funds, or a district leader's personal funds, except when that district leader is also a president, vice-president, or treasurer of that club. Club charter fees may be paid by another club, however membership dues and fees may not.

## Membership-renewal Dues Resources

*Distinguished Club Program and Club Success Plan (Item 1111)*

[www.toastmasters.org/1111](http://www.toastmasters.org/1111)

*Toastmasters International District Recognition Program (Item 1490)*

[www.toastmasters.org/1490](http://www.toastmasters.org/1490)

## Reinstatement of Clubs

Clubs inactive for one full membership-renewal dues period may be reinstated within the next membership-renewal dues period.

Clubs inactive for two or more full membership-renewal dues periods are required to be chartered as new clubs. See **Policy and Protocol, Protocol 2.0: Club and Membership Eligibility**, 1. Club Reinstatement.

For questions about reinstatement and its impact on recognition, contact [districts@toastmasters.org](mailto:districts@toastmasters.org).

## Reinstatement of Clubs Resource

Reinstatement questions

[membership@toastmasters.org](mailto:membership@toastmasters.org)

### STEPS TO REINSTATEMENT

1. Pay current membership-renewal dues for eight individual members
2. Pay any past due account balance
3. Either pay a \$360 reinstatement fee or pay dues for the required eight members for the previous renewal period
4. Submit a current club officer list

### CLUB VISIT FOCUS

- Observe the club's meeting and review the club mission
- Discuss characteristics of successful clubs through best practices
- Ask club leaders how they know they meet the needs of their members
- Set a good example by presenting a project from a manual
- Review the Toastmasters programs (e.g., membership building, Distinguished Club Program)
- Identify prospective future leaders—talk about leadership opportunities within Toastmasters

## AREA DIRECTOR'S CLUB VISITS

The area director's club visits are opportunities for the district to support club officers and enhance club quality. As an area director, be sure to visit each club in your area at least twice per year. First-round visits should take place **between July 1 and November 30**. Second-round visits should take place **between December and May**. The recommendations and support you provide as an area director make a tremendous impact on the future of the clubs in your area. Your contributions empower club officers to help members learn, grow and achieve.

### Preparation for Club Visits

- Review the online **Distinguished Club Program report**.
- Familiarize yourself with the online **Area Director's Club Visit Report** (Item 1471)—it is your evaluation tool during your visit.
- Contact the club president at least one month prior to your visit.
- Request the **Club Success Plan** from the club president and review it prior to the visit.
- Ask the club president about the club's historical information and demographics.
- With the club president, determine the club's specific needs so you can customize your visit and ensure the club gets the most out of it.

Each club visit varies depending on the arrangements you make with the club president. Focus on those items that are applicable based on your agreements.

Spend time with the club leaders. Ask how communication between you and the club can improve. Discuss year-end goals and strategies to achieve them. Use the ***Distinguished Club Program and Club Success Plan*** (Item 1111) as your guide. Recommend methods for moving forward and point out opportunities for enhancement.

### After Club Visits

- Submit the **Area Director's Club Visit Report** (Item 1471) online through District Central. When submitted online, credit is granted instantly and a copy of the form is automatically sent by email to your district leaders and the club president. Reports are due twice a year, by **November 30** and by **May 31**.
- Follow up with the club to learn how things have been since the visit. Ask if the club needs additional support; then provide it.
- Keep records of your club visits and pass them on to the next year's area director. This ensures that clubs' needs are continually met.

## Area Director's Club Visits Resources

*Serving Clubs through Visits: A Guide  
for Area Directors* (Item 219)

[www.toastmasters.org/219](http://www.toastmasters.org/219)

*Moments of Truth* (Item 290)

[www.toastmasters.org/290](http://www.toastmasters.org/290)

*Distinguished Club Program and  
Club Success Plan* (Item 1111)

[www.toastmasters.org/1111](http://www.toastmasters.org/1111)

Tracking Distinguished Club  
Program progress

[www.toastmasters.org/  
distinguishedperformancereports](http://www.toastmasters.org/distinguishedperformancereports)

*Toastmasters International District  
Recognition Program* (Item 1490)

[www.toastmasters.org/1490](http://www.toastmasters.org/1490)

*Area Director's Club Visit Report*  
(Item 1471)

[www.toastmasters.org/areaclubvisits](http://www.toastmasters.org/areaclubvisits)

# PUBLIC RELATIONS AND MARKETING

- ▲ Building brand recognition is important for the vitality of any organization. Club and district leaders can use customizable templates in the Logos, Images and Templates section of the Toastmasters International website ([www.toastmasters.org/logos](http://www.toastmasters.org/logos)) to increase brand awareness and ensure brand consistency throughout communications.

## DISTRICT COMMUNICATIONS

There are a variety of ways to communicate with your members, keep them informed and help the district achieve its mission.

A district may publish its website in donated space and acknowledge the donation on the website. Districts may sell advertising space to offset the cost of renting space.

Toastmasters members may not receive any compensation to create, maintain or host websites for districts, divisions, areas or clubs.

### POLICY AND PROTOCOL

**Protocol 9.0: District Campaigns and Elections, 6. Campaign Communications, P** Advertisements in district publications, such as in newsletters, in conference programs, or on websites, by or on behalf of candidates for district office are not permitted.

District newsletters, websites and directories must include this disclaimer: "Any member contact information in this (newsletter/website/directory) is for the sole use of Toastmasters members for Toastmasters business only. It is not to be used for solicitation and distribution of non-Toastmasters materials or information."

## ▲ DISTRICT WEBSITE

The district director is the publisher of the district website and is responsible for its content. It includes information useful to current and prospective members.

### UNACCEPTABLE MATERIAL FOR WEBSITES

- Individual member mailing addresses, email addresses and telephone numbers (even on a password-protected site)
- International leader or director candidate information (unless the candidate is from that district)
- Advertisements by or on behalf of candidates for district office

### Website Material

- The district newsletter or material from it
- The district calendar
- A link to the Find a Club Near You feature on the Toastmasters International website
- Information about organizing new clubs
- Features and benefits of membership
- Membership-building tips for clubs
- Dates to identify the timeliness of the information
- The names, telephone numbers and email addresses of district leaders, the webmaster and district support personnel (with express written permission from each person)
- Names and years of service of past district leaders

### POLICY AND PROTOCOL

#### Protocol 4.0: Intellectual Property, 2. Websites, I

Toastmasters websites may not include copyrighted information from Toastmasters International or any other source without the express written permission of the copyright owner.

## District Website Resources

Find a Club Near You

[www.toastmasters.org/find](http://www.toastmasters.org/find)

Public Relations

[www.toastmasters.org/publicrelations](http://www.toastmasters.org/publicrelations)

## DISTRICT NEWSLETTER

The district director is the publisher of the district newsletter and is responsible for its content, which provides information to promote the district and club missions. The newsletter is distributed to members within the district.

Make sure the newsletter is sent to all council members at least two weeks before the district's annual meeting. In December or January, include an article describing each district office, its responsibilities and the qualifications required to serve in the office. Include a form for submitting the names of candidates.

### Newsletter Material

- District leader contact information
- Motivation to grow clubs and membership and meet education goals
- Promotion of Toastmasters membership and education programs
- Promotion of the mission of Toastmasters, the district and clubs
- Distinguished Recognition Program
- District calendar
- District leadership committee report and a statement from each nominated candidate
- District and Toastmasters International website addresses
- Administrative information
- Call for candidates
- Information about club and member retention efforts

## DISTRICT DIRECTORIES

If published, a district directory is distributed to members of the district council. The district director is the publisher and is responsible for its content. At the discretion of the district director, the directory may be distributed to past district governors and directors, club leaders and others upon request.

### District Directory Material

- District leader and club leader email addresses and telephone numbers
- Toastmasters International and district missions
- Club meeting times, locations, contact information and websites
- Contact information for member questions
- Email addresses and telephone numbers of past district governors and directors, past international presidents and past international directors
- Membership and education program information
- District Recognition Program performance history
- Calendar of events

The directory may not include information on candidates for office at any level of the organization.

## SURVEYS

With few exceptions, only Toastmasters International may conduct and release the results of surveys of members and former members. The Chief Executive Officer may grant permission to outside entities, such as academic sources, to conduct surveys and release and use their results. Clubs may survey their own members and districts may survey their members about education programs in order to use the results within the district. See **Policy and Protocol, Policy 4.0: Intellectual Property**, 4. Surveys.

## MEMBERSHIP AND MAILING LISTS

Unless otherwise authorized by the Board of Directors, Toastmasters International does not make its mailing lists available.

### POLICY AND PROTOCOL

#### Policy 4.0: Intellectual Property, 3. Membership Contact Information

- A. Members' contact information is only provided to appropriate members and officers as needed.
- B. Members' contact information is only used for official Toastmasters business.
- C. Access to members' contact information is governed by and limited to the provisions of the California Nonprofit Public Benefit Corporation Law.

### District Communications Resources

Member questions	<a href="http://www.toastmasters.org/contactus">www.toastmasters.org/contactus</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>
Creating materials with Toastmasters logos	<a href="http://www.toastmasters.org/creatingmaterials">www.toastmasters.org/creatingmaterials</a>

## ▲ TRADEMARKS AND COPYRIGHTS

Toastmasters International makes its names, emblems, insignias, marks and materials available for use throughout the organization for promotion and management purposes. However, all usage must be in full compliance with the appropriate copyright and trademark laws in order to preserve the value and unique nature of these items.

Toastmasters International's principal asset is its reputation. Toastmasters International maintains its reputation and the distinction between itself and other communication training programs through the registrations and other measures taken to protect its collective membership marks, trade names, trademarks and service marks (including the official emblem or insignia). If Toastmasters International should fail to protect these rights, they could be lost, and Toastmasters International would no longer exist as the exemplary communication training organization it is. See **Policy and Protocol, Policy 4.0: Intellectual Property**, 2. Use of Toastmasters Material and **Policy and Protocol, Protocol 4.0: Intellectual Property**, 1. Trademarks.

## Trademark and Copyright Resources

Trademark Use Request	<a href="http://www.toastmasters.org/trademarkuse">www.toastmasters.org/trademarkuse</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>

## SPEAKERS BUREAUS

Many districts organize speakers bureaus and encourage members to participate in them. Speakers bureaus allow members to gain valuable experience in speaking to audiences outside of Toastmasters. A speakers bureau chair is responsible for selecting qualified speakers for the bureau who can positively represent the organization.

## Speakers Bureau Resources

How to Start a Toastmasters Speakers Bureau (Item 127)	<a href="http://www.toastmasters.org/127">www.toastmasters.org/127</a>
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# DISTRICT EVENTS

## HOSTING DISTRICT EVENTS

As a district leader, you may have the opportunity to host guests at a banquet, speech contest, or other district event. When hosting these types of events, it's important to use proper etiquette as you welcome and introduce guests.

Plan ahead for VIP guests and assign a host to each of them. The host should be available to greet guests at the door and assist them as needed. If a meal is available at the event, VIP guests and their companions may not have to pay for it. In many cases, the district anticipates and budgets for this expense. Confirm whether VIP guests will receive complimentary meals before you host an event. Remember, it is your responsibility to ensure that all guests feel welcome and informed.

As a host, it's important to pronounce guests' names accurately and include their current titles as you introduce them. If any visiting dignitaries are overlooked during the introductions, acknowledge and introduce them as soon as you note their presence.

### ▲ EVENT SPONSORSHIP

Districts may secure sponsorship for district events as a strategy for offsetting costs. In every case, the district director must approve the sponsorship.

#### ACCEPTABLE DONATIONS

- In-kind compensation (e.g., printing)
- Money
- Products (e.g., pens, bags, notebooks)
- Services (e.g., airport shuttle)

#### District Reciprocation for Sponsorship

- Recognition in print (e.g., conference program, event program, website)
- Recognition in signage (e.g., a reception display acknowledging the sponsor of hors d'oeuvres)
- Verbal recognition (e.g., by the host at the beginning of the meeting)
- Complimentary event registration for the sponsor
- Space (e.g., a meeting room in which the sponsor can display products or services that support Toastmasters International's mission)

## SPEAKER SPONSORSHIP

To keep event expenses down, find speakers for district events who are located in the district. If the speaker is from outside the district, seek sponsorship from an organization or individual to offset costs associated with the speaker's appearance.

#### ACCEPTABLE SPEAKER SPONSORSHIP

Excess funds earned by the event (e.g., registration fees) may be allocated to offset speakers' expenses provided the budget forecasts positive results. The excess funds may be used only for travel costs associated with lodging, the lowest-rate round-trip airfare or mileage reimbursement, complimentary registration and related meals. The speaker is responsible for all other expenses.

#### UNACCEPTABLE SPEAKER SPONSORSHIP

Districts may not pay speakers' fees.

#### ACCEPTABLE SPEAKER SPONSORSHIP

A district may use donated airfare or hotel vouchers for travel costs associated with a speaker's appearance.

A district may use money from a sponsor to offset costs associated with a speaker's appearance.

The speaker's presentation must directly support the Toastmasters mission and be related to the Toastmasters education program.

#### UNACCEPTABLE SPEAKER SPONSORSHIP

Membership dues income may not be allocated to offset speakers' expenses.

## SPEAKER AGREEMENT

Toastmasters International requires the use of a written speaker agreement for all conference speakers. A **written speaker agreement** protects the organization and clearly defines the obligations of the district and the speaker.

## SALE OF SPEAKERS' PRODUCTS

Often speakers want to make their products or services available for purchase at an event.

### Guidelines for Sale of Speakers' Products

- The product must support the event's goals and objectives, including the Toastmasters mission.
- The speaker may sell the product or service for a maximum of two hours after his or her presentation has ended provided this time does not conflict with the meeting time for the district council or business meeting. Each speaker is limited to one sales opportunity even if he or she is conducting multiple presentations.
- The district may supply the speaker with table space no larger than four feet by eight feet (1.2 meters by 2.4 meters). The table should be as close as safely possible outside the speaker's presentation room.
- The product or service sales must be coordinated by the speaker. This includes product display, sales transactions, sales taxes and removing the products from the display area after the allotted time has ended. The speaker is also responsible for set-up, staffing, labor, and related expenses for product sales. No district leader may assist the speaker with sales. Should other individual members choose to help the speaker sell, the speaker assumes any risks for their actions; and the district bears no responsibility.
- The speaker may not promote the product or service during the presentation. However, the speaker or facilitator can make an announcement concerning product or service sales at the conclusion of the presentation, including how long the product or service will be sold at the event.
- Districts are not responsible for any defective products or services a speaker sells.

Selecting the right speakers for your district conference is one of the most important aspects of planning and selection. The keynote speaker is the most critical. If an international officer or director is scheduled to visit during your district conference, as the most esteemed guest, he or she should be offered the most prominent speaking position.

### Speaker Sponsorship Resources

Sample speaker agreement	<a href="http://www.toastmasters.org/ssguidelines">www.toastmasters.org/ssguidelines</a>
Speaker guidelines	<a href="https://www.toastmasters.org/districtconferencespeakerguidelines">https://www.toastmasters.org/districtconferencespeakerguidelines</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>

## THE DISTRICT CONFERENCE

The district conference is an exciting educational and networking event for a district's clubs.

### District Conference Purposes

- District business
- Communication and leadership training opportunities in support of the district mission
- Opportunities for networking and the exchange of ideas
- Recognition and celebration of district accomplishments

### ELEMENTS OF A SUCCESSFUL DISTRICT CONFERENCE

- An exciting and varied education program
- Excellent location
- Pricing and value

## PLANNING

Planning is the key to a successful district conference. Members should leave the conference feeling that they enjoyed it, learned, and benefited from it. You can make this happen with some creativity and planning.

Keep sessions focused on speaking, communication, and leadership and other topics that promote club success. Select speakers who can deliver exciting and motivational sessions. Promote the education program early and often.

Schedule the conference in a place that is accessible to most members. Consider rotating the conference among accessible sites.

The district conference should be self-supporting. Promote the value of the conference and consider offering discount packages and early registration promotions. A district conference can be a great learning experience at a reasonable cost.

## CHAIRS

The success of a district conference also depends on appointing the right people to fill important positions.

### Suggested District Conference Chairs

- Conference committee chair (conference chair)
- Finance chair
- Education program chair
- Venue chair
- Public relations chair

## PROGRAM

Under the guidance of the district director and program quality director, the conference committee chair is responsible for coordinating all aspects of the conference, including preparing the meeting agenda, selecting the venue, scheduling presenters and providing onsite assistance. This person collaborates with the finance, education, venue and public relations chairs to ensure the conference meets the district's goals.

Communication is essential to district conference success. Members of the conference committee meet regularly, follow up with fellow committee members and venue contacts and keep the district director and program quality director informed of progress. Through clear communication and careful preparation, the committee can plan a conference that is informative, productive and entertaining for all attendees.

Make sure all sessions start and end on time. Schedule plenty of time for transitioning between sessions. Allow at least 15 minutes between major conference events, such as education sessions and luncheons.

Balance the program with speeches and audience involvement sessions to keep your meeting interesting. Remember that participation enhances learning.

## FINANCING

The finance chair is responsible for all financial matters involved in presenting the conference, including registration. While all district conference expenses are considered part of the overall district budget, the district conference should not lose money. Ideally, it should make a small profit. Most conference income is generated from ticket sales for events and from a modest registration fee. Principal expenses are the cost of meals, promotional materials and programs.

The district conference is a district event. The district must maintain direct control over any event, negotiation or transaction that involves conference finances. Often, conferences are hosted by a club, area or division. However, only the district director may approve and sign contracts on behalf of the district (eg. venue selection, negotiate prices and purchase services). All expenses should be paid by the district director and finance manager.

Accurate financial planning is essential to the success of a district conference. Control expenses and keep them to a minimum so the cost to the individual Toastmasters member is reasonable.

### DISTRICT ADMINISTRATIVE BYLAWS

#### Article IX: District Council, (b) Authority

The district council shall serve as the administrative governing body of the district, operating with powers delegated to the district council by the Board of Directors of Toastmasters International and subject at all times to the ultimate direction of the Board of Directors and the Articles of Incorporation, Bylaws, Policies, and decisions of Toastmasters International, and these administrative bylaws. The district council shall conduct all business of the district, shall assume responsibility for the payment, with district funds, of all debts incurred in the presentation of district council meetings and other district functions, and shall not assess or impose any financial obligation on any member club or any individual member of a club.

### TIPS FOR AN OUTSTANDING EDUCATION PROGRAM

- Set objectives
- Meet members' needs
- Pay strict attention to scheduling
- Balance the program
- Publicize the program widely and early

## Venue Contracts

Often, district conferences take place in hotels, but no matter what venue your district chooses, review the venue's contract thoroughly before you create a budget for the conference. Additional items to include when preparing a budget are penalties associated with attrition, or slippage, clauses. Sometimes fewer people attend the conference than expected, which means fewer banquet meals and rooms booked. Event sites such as hotels often charge when this occurs. For example, you may be required to pay for meeting rooms and set-up, as outlined in the contract. Budget for these potential costs as conference expenses. The district director will be the final signatory for all contracts being paid using district funds.

Be sure to obtain a detailed schedule of charges from the event site for any miscellaneous expenses, such as microphones, audiovisual equipment, spotlights and Internet access. These costs should be considered when you determine your registration fee.

## Meeting Rooms

With careful planning, you may be able to avoid meeting room charges. Depending on the volume of meals and sleeping rooms booked, many venues waive, or at least reduce, these charges.

## Meals

Be sure meal ticket prices cover the entire cost of the meal, including the prevailing tax and gratuity. Then add a margin to the ticket price to cover miscellaneous expenses, such as decorations and entertainment.

## EDUCATION SESSIONS

The education program chair is appointed to organize the general education sessions and training sessions, such as those for area directors, division directors and club leaders. The education program chair is responsible for the education sessions, speakers, awards, speech contests, entertainment and room set-up for all meetings. The education program chair collaborates closely with the venue chair to make sure each event runs smoothly.

One of the features that attract members to the district conference is the educational program. Depending on the size and availability of meeting space, you may wish to hold one large session or have several programs for smaller audiences running concurrently.

### Session Guidelines

- Cover the many aspects of communication and leadership (e.g., speaking, listening, evaluation and motivation).
- Focus on improving and strengthening clubs (e.g., the Distinguished Club Program, membership growth, outstanding club programming, public relations, Speechcraft).
- Consult with division and area directors to find Toastmasters who are willing and available to give presentations.

Your district has many talented Toastmasters, so you should not have to hire speakers. If a non-Toastmasters speaker is desired, get one without paying a fee.

## VENUE SELECTION

The venue chair is responsible for accommodations, meal arrangements, meeting rooms, equipment and displays.

The importance of planning cannot be overemphasized. Shop around for your conference hotel or meeting site. Consider two, three or more sites and advise sales representatives that you are considering other venues. Ask for a package deal taking into account guest rooms and meal prices. This means hard bargaining and negotiating on your part. However, your conference is a valuable piece of business and should be presented as such.

As you select a venue, be sure the facility provides appropriate accommodations for people with disabilities. In the United States, the Americans with Disabilities Act requires hotels to be barrier-free in all areas accessed by the public. Under the act, a person with a disability has the right to reasonable accommodations to allow him or her to participate as fully as possible at conferences or other types of events. Other countries have similar laws that protect people with disabilities. As a district leader planning an event, it is your responsibility to ensure the selected venue complies with applicable laws in your jurisdiction related to accommodations for people with disabilities. See **Policy and Protocol**, Protocol 2.0: Club and Membership Eligibility, 2. Members with Disabilities.

## Charges and Written Agreements

Beware of hidden set-up charges for meal and meeting functions. Hotels and other venues expect you to pay these if you don't negotiate them in advance. You might be able to get discounts on food and beverages, room fees and parking. It's often possible to arrange complimentary rooms for an attending international officer or director, region advisor and district director.

Many event sites have frequent employee turnover. Do not depend on verbal agreements with a hotel representative who may not be with the hotel when your meeting is finally held. Make certain all waivers, discounts, materials and services are written into your agreement with the venue. If you are not sure about something, ask!

## Visiting the Venue

When visiting the event site before the conference, watch for sources of noise that might interfere with the speech contest, such as live music and kitchen traffic from restaurants. Be sure the hotel has not booked a party or wedding reception in an adjacent room. Double-check sleeping room blocks and meeting rooms.

## PUBLIC RELATIONS

The public relations chair is responsible for the promotion of conference events to Toastmasters in the district and to the public. This person works closely with the public relations manager and club growth director to ensure the conference receives exposure in district and club newsletters, websites and available media. In some instances, the public relations manager may serve as the conference public relations chair.

### VENUE SELECTION GUIDELINES

- Scout the location
- Plan it
- Negotiate
- Get it in writing
- Confirm and reconfirm



## THE COMMUNICATION AND LEADERSHIP AWARD

One of the most effective ways to gain publicity is through the **Communication and Leadership Award**. This award is presented by the district to an individual in the community who is recognized in the communication or leadership fields. Honorees may include members of the media, community leaders, business professionals and entrepreneurs. Contact [pr@toastmasters.org](mailto:pr@toastmasters.org) to discuss publicity opportunities for the honoree.

## HOSPITALITY CENTER

Set up a hospitality center in a centrally located room where attendees can congregate when they are not attending sessions. Information about tours or other activities might be available here. You may ask a local club to assume the hospitality function as a club project. The club may provide refreshments with proceeds going to the club. Based on the number of sleeping rooms used in a hotel, a hospitality room may be available at no charge.

Keep public relations costs to a minimum by asking members and local businesses to contribute materials and services for promotional ads, items and program printing.

## Features in Promotional Material

- Program topics to be presented at the seminars
- Registration and event costs
- Hotel reservations
- Advance registration
- Attractions in the host city

## Conference Announcements

Be sure to announce the conference on the district website and in the district newsletter, and include the deadline for registration. Provide registration forms in advance. Promote early and follow up often. Encourage clubs, areas and divisions to promote the conference. Begin early in the year by announcing the conference date and location. Later, provide program information as it becomes available.

## News Releases

Send news releases about the district conference to local media, such as newspapers, radio and television. The most newsworthy event is the Toastmasters International Speech Contest, so focus your public relations efforts on media coverage of this event. Be sure to publicize any prominent speakers on the program and the **Communication and Leadership Award** (Item 1971C) recipient.

Contact your local convention and visitors' bureau or chamber of commerce regarding a free listing to help promote your district conference. Refer to *Let the World Know* (Item 1140) for more ideas and guidelines on promoting your event.

## ▲ PHYSICAL ARRANGEMENTS

Send conference registration forms to all attending international officers, directors and region advisors. Each needs to know important details such as whether the banquet requires formal attire. Make certain that guest speakers are given every courtesy and that their staging or audiovisual needs are met.

## Registration Desk

Situate the conference registration desk with tables and some chairs in a lobby or foyer, close to the conference events. Be sure to have the registration desk amply staffed with local, enthusiastic Toastmasters.

## Meal Tickets

Sell tickets in advance to guarantee meal functions. Ask the hotel or catering service how soon it needs a firm guarantee. Be careful not to over-guarantee on the meal counts and end up with a loss. Selling tickets in advance and not at the door helps you arrive at correct guarantee figures. Obtain district conference attendance figures for the past three years to guide you in making arrangements.

## Room Set-up

The education program chair works closely with the venue chair in making the physical arrangements for all events and sessions of the conference. This means working with event site personnel to provide platforms, lecterns, audiovisual and other equipment needed for individual sessions. Make certain speakers' equipment and room layout needs are met.

Provide detailed room charts or diagrams to the event site staff early in your conference planning. A chart should be prepared for every meeting, including banquets, education sessions, special events, annual meetings and entertainment. If possible, arrange for meeting rooms to be fully set up the night before the events. Then check the set-up at least an hour before an event begins.

## Flag Protocol

Prior to the district conference, ensure all country flags are displayed appropriately. The host country's flag is always placed stage right (the section of the stage that is right of center as you face the audience); this is known as the position of honor. Additional flags are placed stage left (the section of the stage that is left of center as you face the audience). All flags must have the same dimensions and be displayed at the same height.

## CONFERENCE BANQUET

The banquet often is the showcase event for a district conference.

The banquet provides the opportunity to allow an international officer or international director to give a keynote address. It's also an opportunity to recognize outgoing and incoming district leaders and any special guests in the audience.

## Banquet Set-up

For the banquet and speech contest, you may need a head table or two, placed on risers, to accommodate program participants. Contestants are typically seated at a reserved table on the floor in front. Conduct the speech contest from a contest platform separate from the head table. Ideally, the contest platform is located on a side of the room opposite the head table. Place the timing device in front of the platform, clearly visible to contest speakers.

## The Head Table

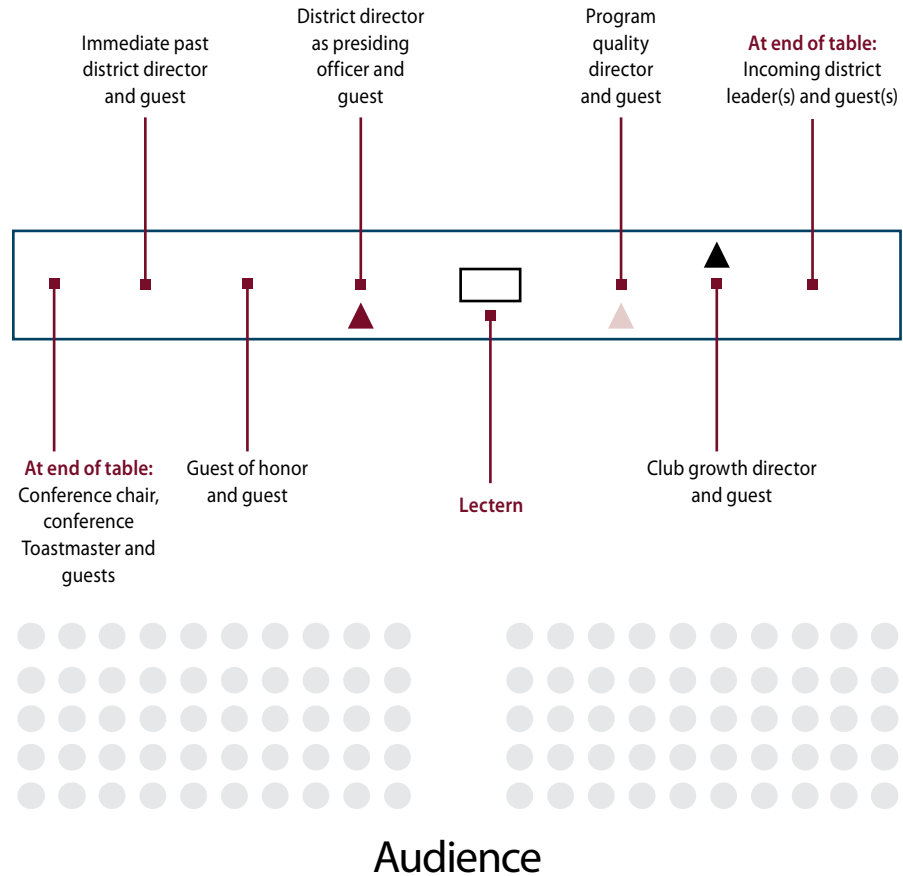
Typically, there is one head table with dignitaries and their guests. In most instances, the district director, program quality director, club growth director, the immediate past district director, and any international officer, international director or region advisor are seated at the head table. Keep in mind that guests of these dignitaries are always seated to the right of their partner.

If it is the last district conference of the year, it may be appropriate to seat the incoming district director, program quality director and club growth director at the head table as well.



## TIPS

- Use name cards at the head table
- Let head table guests know in writing where and when to assemble for the march-in
- Provide guests with a seating diagram that describes how to get to their seat during the march-in
- Situate conference volunteers to help head-table guests
- Review the pronunciation of names before the march-in. If you are unsure how to pronounce a name, ask the guest
- Announce each guest, giving his or her name last (for example, "From Central City: District Director Brenda Yung and her husband, Dillard")



## Introductions

Announcing head table guests as part of the march-in eliminates the need for the presiding officer to introduce everybody at the head table later on.

The highest-ranking leader or the guest of honor (international officer, international director or region advisor) is typically announced last.

## RANK

1. National government officials
2. State or province officials
3. City or local officials
4. Prominent citizens
5. Toastmasters officers
6. Toastmasters directors
7. Region advisors
8. Past Toastmasters officers
9. Past Toastmasters directors
10. District leaders
11. Division leaders
12. Area leaders
13. Club leaders

### Order of Introduction of Head Table

1. Other guests, such as the conference chair and their guests
2. Incoming club growth director and program quality director and guests (at last district conference of the year)
3. Immediate past district director and guest
4. Club growth director and guest
5. Program quality director and guest
6. District director and guest
7. Guest of honor (international officer, international director or region advisor) and guest

After the head table march-in or introduction, and prior to serving the meal, the district director introduces special guests seated in the audience. Introduce those of highest rank first.

## Order of Introduction of Special Audience Members

1. Local dignitaries (government officials, media, etc.) attend the conference in an unofficial capacity)
2. Toastmasters officers (who currently serve on the Board of Directors and attend the conference in an unofficial capacity)
3. International directors (who currently serve on the Board of Directors and
4. Region advisor
5. Past international presidents and past international directors
6. Past region advisors
7. Past district directors
8. Current district leaders

## The Speech Contest

The district speech contest is an essential aspect of the district conference. The speech contest brings many members and guests to the event.

Be sure all contest officials are thoroughly familiar with the speech contest rules. Select judges carefully and have the chief judge provide them with an orientation.

Arrange with the venue so that no food or beverage service takes place during the speech contest.

## District Conference Resources

<i>Put on a Good Show</i> (Item 220)	<a href="http://www.toastmasters.org/220">www.toastmasters.org/220</a>
<i>The Speech Contest Rulebook</i> (Item 1171)	<a href="http://www.toastmasters.org/1171">www.toastmasters.org/1171</a>
Questions about venue contracts	<a href="mailto:districts@toastmasters.org">districts@toastmasters.org</a>
Products for the event	<a href="http://www.toastmasters.org/districtproductguide">www.toastmasters.org/districtproductguide</a>

## ELECTIONS

District leader elections are held at district councils' annual meetings at district conferences worldwide between **March 15** and **June 1**. All district officers must be paid members of Toastmasters International for the duration of their terms. See **District Administrative Bylaws, Article VII: Officers, (d) Qualifications**.

### DISTRICT LEADERSHIP POSITIONS

- District director
- Program quality director
- Club growth director
- Administration manager\*
- Finance manager\*
- Public relations manager\*
- Division director
- Area director\*

\*May be appointed by the incoming district director

## POLICY AND PROTOCOL

### Protocol 9.0: District Campaigns and Elections, 1. Schedule

DATE	ACTION
October 1	District Director appoints District Leadership Committee (DLC) Chair.
November 1	DLC members are recommended by the DLC chair and approved by the District Director.
No later than November 30	Call for candidate declarations.
December 15	Deadline for candidates to declare intent to run.
March 15 – June 1	District council annual meetings occur (actual dates set by each district).
Six weeks prior to the election date	DLC notifies District Director of nominated candidates.
Four weeks prior to the election date	DLC publishes nominations on District website.  Floor candidates may declare their intent to run after the DLC results have been announced.
July 15	Deadline to submit Officer Agreement and Release Statements and District Leader rosters to World Headquarters.

### DISTRICT LEADERSHIP COMMITTEE

The district leadership committee is charged with nominating candidates for district office. The purpose of the committee is to find the best-qualified candidates possible to serve as district leaders.

### ▲ DISTRICT LEADERSHIP COMMITTEE

The work of the district leadership committee (DLC) is critical to ensuring long-term success for the district. Led by the committee chair, committee members screen district leader candidates for eligibility and ultimately nominate the best individuals. Identifying the best candidates for elected positions takes time and commitment. The committee should not limit itself to considering only those members who have expressed an interest in running, but should seek out qualified individuals. See **Policy and Protocol, Protocol 9.0: District Campaigns and Elections, 2. District Leadership Committee.**

### DISTRICT ADMINISTRATIVE BYLAWS

#### Article XI: Committees, (b) District Leadership Committee

The district director shall appoint the district leadership committee chair no later than **October 1**. The remaining committee members shall be appointed no later than **November 1** and shall consist of no fewer than five members. The committee shall operate under the procedural rules adopted by the Toastmasters International Board of Directors for the selection of candidates for the elective district offices. The committee's results shall be reported in writing to the district director no fewer than six weeks before the district council's annual meeting. The district director shall submit the district leadership committee report to the members of the district council at least four weeks prior to the annual meeting.

When the committee finalizes its nominations, the chair or the district director notifies each nominated candidate to reconfirm their willingness to be nominated and their commitment to fulfill the duties of the office. Non-nominated candidates also are notified and advised of their eligibility to seek office as floor candidates. See **Policy and Protocol, Protocol 9.0: District Campaigns and Elections**, 4. Nomination Results.

### District Leadership Committee Resources

District Leader Elections Toolkit <http://www.toastmasters.org/districtelectionstoolkit>  
Governing documents [www.toastmasters.org/govdocs](http://www.toastmasters.org/govdocs)  
District leadership committee [www.toastmasters.org/districtleadershipcommittee](http://www.toastmasters.org/districtleadershipcommittee)  
District leader competencies [www.toastmasters.org/districtleadercompetencies](http://www.toastmasters.org/districtleadercompetencies)

## DISTRICT LEADER CAMPAIGNS

You as a district leader lay the foundation for conducting a fair and accurate election. Candidates may ask you questions about the campaign process and the rules they are expected to follow.

District leader candidates may develop communications as part of their campaigns. However, all candidates must follow the rules described in **Policy and Protocol, Protocol 9.0: District Campaigns and Elections**, 6. Campaign Communications. Refer to this information when a candidate asks for guidance.

At the district conference, consider scheduling a Candidates' Showcase so each district officer candidate may present before the district council's annual meeting. Prior to the conference, the district director appoints members to serve as chair and co-chair of the Candidates' Showcase. See **Policy and Protocol, Protocol 9.0: District Campaigns and Elections**, 9. Candidates' Showcase.

### District Leader Campaign Resources

District Leader Elections Toolkit [www.toastmasters.org/districtelectionstoolkit](http://www.toastmasters.org/districtelectionstoolkit)  
Guidelines for candidates and campaigns [www.toastmasters.org/districtcampaigns](http://www.toastmasters.org/districtcampaigns)

## DISTRICT LEADER ELECTION VOTING PRIVILEGES

The only members who may vote in a district election are members of the district council. Voting members of the district council include club presidents, vice presidents education and the members of the district executive committee.

The club presidents and vice presidents education each have one vote on the council. Either may designate any paid member of their club to act as their proxy. No other proxies are allowed. District executive committee members are entitled to a maximum of three votes each: two votes for the club and one vote for the district executive committee. Non-committee members are entitled to two votes. Belonging to or being an officer in more than one club doesn't give a member any additional votes.



### CANDIDATES AND SPEECH CONTESTS

Candidates for district office are not eligible to enter speech contests. However, a member who is no longer a speech contestant is permitted to run as a floor candidate.



See **District Administration Bylaws, Article X: Council Meetings, Quorum, Proxies, and Voting**, (e) Voting.

The voting strength of club representatives on district councils must be protected and preserved. No district may add voting members to district councils who are not club representatives or members of the district executive committee.

If a club is considered delinquent, then the club leaders are not entitled to voting privileges until dues have been paid. See **Policy and Protocol, Policy 2.0: Club and Membership Eligibility**, 4. Good Standing of Clubs.

A newly chartered club is entitled to voting privileges when the charter process is complete.

## Proxies

Either the club president or vice president education may designate, in writing, any paid individual member of the club to act as a proxy for him or her at the annual district council meeting that is held in-person. If the president or vice president education does not attend the meeting and has not designated a fellow club member to act as his or her proxy holder, the officer or proxy holder in attendance casts two votes. The intent of this provision is to ensure that every club is represented by two votes.

A written proxy is valid at a district council annual meeting as long as it contains all the elements set forth in Toastmasters International policy and must be delivered personally, by mail, by fax, by e-mail, by electronic transmission, or by other reasonable means to the club member who will hold the proxy.

The proxy holder must present the proxy in paper form to the credentials desk. A proxy holder cannot transfer or assign a proxy to someone else.

### **POLICY AND PROTOCOL**

#### **Protocol 9.0: District Campaigns and Elections, 10. Proxies and Credentials, A–C**

- A. District proxies and voting are governed by the District Administrative Bylaws, Article X, Sections (d) and (e).
- B. The district director sends a credential or proxy form to each club president and vice president education 30 days before a district council annual meeting in the district newsletter or in a separate mailing.
- C. Proxies are valid only for in-person meetings.

### **CREDENTIALS CHAIR**

The credentials chair assists the district in conducting a successful election meeting. Responsibilities of the credentials chair include obtaining a list of clubs eligible to vote, preparing ballots, registering district voters and their proxies and overseeing the credentials committee.

## Credentials

The district director, program quality director and club growth director may request lists of clubs eligible to vote for the credentials committee from World Headquarters.

Individuals who serve on the credentials committee are not permitted to wear or display campaign paraphernalia. See **Policy and Protocol, Protocol 9.0: District Campaign and Elections**, 6. Campaign Communications, J.

## POLICY AND PROTOCOL

### Protocol 9.0: District Campaigns and Elections, 10. Proxies and Credentials, D–H

- D. Prior to the district council annual meeting, the district director appoints a credentials chair to supervise the credentials, voting and ballot counting processes. The credentials chair may select members to form a credentials committee.
- E. The credentials chair is, when practicable, a past district director.
- F. The credentials chair obtains a list of paid clubs and a list of current district council members (club presidents, vice presidents education, and district officers eligible to vote). The credentials chair ensures that ballots are only issued to current district council members or their authorized proxies and are signed for upon distribution.
- G. Ballots indicate the office being contested or are sequentially numbered. The names of nominated candidates may be printed on the ballots. The names of floor candidates may not be printed on the ballots. Ballot templates are available on the Toastmasters International website.
- H. The credentials committee ensures that no campaign materials are in the credentials area.

## Quorum

One-third of club presidents and vice presidents education in the district (or proxy holders) constitutes a quorum for the annual district council meeting that is held in-person. If a quorum is not present at a district council meeting, business decided at the meeting is valid only after it is approved by a majority of clubs on the basis of two votes per club. As soon as possible after the meeting, the district director notifies the clubs so that affirmation can be obtained within a reasonable time. See **District Administrative Bylaws, Article X: Council Meetings, Quorum, Proxies, and Voting**, (c) Quorum.

Before election day, work with clubs to ensure all votes are in order and all club officer roles are filled. If a club has not filled a vote-holding officer position, that vote is lost; it may not be transferred to anyone else.

### District Leader Voting Privileges Resources

Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
List of clubs eligible to vote	<a href="mailto:listrequest@toastmasters.org">listrequest@toastmasters.org</a>
Credentials package	<a href="http://www.toastmasters.org/districtcredentialscommittee">www.toastmasters.org/districtcredentialscommittee</a>

## ELECTION DAY

At the district council's annual meeting, the district director, or a person designated by the district director, explains the election rules and procedures to the delegates.

The DLC chair, or designee, presents the committee report. During this period, the chair or designee reads the name of each nominated candidate for each elected position.



After all names are read, the district director asks if there are additional nominations from the floor for the first contested election. Candidates nominated for one office and not elected may be nominated from the floor for subsequent offices. Floor candidates must be nominated by a member of the district council or their proxy holder. However, floor candidates may self-nominate when they are a member of the district council or a proxy holder. If a floor candidate is absent, then his or her representative may state their eligibility qualifications. The district director ensures Officer Agreement and Release Statements are collected from floor candidates for all elected positions.

After nominations close for an office, candidates give speeches for that office. Each district leader candidate, including floor candidates, is allotted a timed speech. These speeches are delivered in alphabetical order by the candidate's last name, by office, beginning with the highest contested office. Each speech is delivered from the platform and given by the candidate, if present. If the candidate is absent, the candidate's representative may give the speech. No other speeches, demonstrations or other activities are allowed during the district council's annual meeting.

Balloting for each office takes place immediately following candidate speeches for that role. District officer candidates appoint an observer to monitor the integrity of the voting and ballot counting process. Each election is completed and the winner announced before moving to the subsequent election. If there is only one candidate for an office, the district director may entertain a motion to dispense with the secret ballot or ask the administration manager to cast a single ballot for the candidate.

A candidate who receives a majority of the votes is declared elected. If no candidate receives a majority of the votes, then voting continues with the use of special ballots and without the name of the candidate receiving the fewest votes. This procedure continues until one of the candidates receives a majority of the votes.

Upon adjournment of the district council's annual meeting, all election results are final and displayed in the registration area and on the district website.

For more information and guidance about election day procedures, see **Policy and Protocol, Protocol 9.0: District Campaigns and Elections**, 11. Elections.

### Election Day Resources

Candidate speeches and voting logistics	<a href="http://www.toastmasters.org/districtcampaignspeeches">www.toastmasters.org/districtcampaignspeeches</a>
General district election information	<a href="http://www.toastmasters.org/districtelectioninformation">www.toastmasters.org/districtelectioninformation</a>
Governing documents	<a href="http://www.toastmasters.org/govdocs">www.toastmasters.org/govdocs</a>
Elections questions	<a href="mailto:districts@toastmasters.org">districts@toastmasters.org</a>



### District Leader Installation

The district leader installation ceremony is often conducted at the district's annual meeting **between March 15 and June 1**. The purpose of this ceremony is to formally induct new district leaders and get their public commitment to achieve the district mission and lead their district to Distinguished recognition. Generally, the district director is the most appropriate person to serve as inducting officer. However, if the ceremony coincides with a visit from an international officer or director, then one of these leaders may be asked to conduct the ceremony.

If time is a concern, you may decline to induct the area directors, or you may induct area and division directors as a group. If time is not constrained and the district wishes to induct additional appointed leaders or committee chairs, do so before inducting area directors or as you induct the administration manager, finance manager and public relations manager.

### District Leader Installation Resources

Purchase supplies for incoming leaders	<a href="http://www.toastmasters.org/shopincomingdistrictleaders">www.toastmasters.org/ shopincomingdistrictleaders</a>
Honor outgoing leaders	<a href="http://www.toastmasters.org/shopoutgoingdistrictleaders">www.toastmasters.org/ shopoutgoingdistrictleaders</a>
District leader installation script	<a href="http://www.toastmasters.org/districtleaderinstallation">www.toastmasters.org/ districtleaderinstallation</a>

## AREA DIRECTOR ELECTIONS

### Area Director Election Voting Privileges

The area council meeting, at which the election for area director is conducted, must be held at least two weeks before or up to four weeks after the annual meeting of the district council. This timeframe allows leaders to adjust any alignment changes. The current area director determines the time and place of the meeting. Written notice of the election must be given to the president of each club in the area at least four weeks before the election. Notice includes the qualifications for candidates and lists the voting members of the area council.

No other member of the area council has a vote.

### Area Director Election Quorum

A majority of the voting area council members or their proxies constitutes a quorum. If a quorum is not present, an election cannot be held unless another meeting is conducted which is properly noticed and at which a quorum is present.

### Area Director Election Proxies

The club president, vice president education and vice president membership may designate, in writing, any paid member of the club to act as a proxy at the area council election meeting. In the event two of those leaders don't attend the meeting and have not designated, in writing, active members of the club to act as their proxies at the meeting, the leader or proxy holder in attendance is deemed to hold the proxy of the others and may cast the club's three votes. If two valid proxy holders are present and cannot decide among themselves who will cast the third vote, the third proxy goes to the highest-ranking leader (or proxy holder) present. Keep in mind that if one of these three club officer roles is not filled, no one may vote on behalf of that role.

### Area Director Candidates

Each club in the area may submit to the area director, in writing, any paid member as a candidate for area director. The area director places the names of candidates from

#### VOTING MEMBERS OF THE AREA COUNCIL

- Club presidents
- Club vice presidents education
- Club vice presidents membership

the clubs in nomination at the election. Nominations then will be accepted from the floor. After the nominations are closed, if there is only one candidate, the area director declares that candidate elected.

If two or more candidates are nominated, each candidate is entitled to a two-minute speech. The speeches are delivered in alphabetical order of the candidate's last name. If a candidate is not present, that candidate's representative may give the speech.

Each area council member in attendance or proxy holder is entitled to one vote. No area council member or proxy holder may cast more than three votes, even if that person is a member of more than one club.

The area director may act as a club proxy holder and may cast up to three votes. However, in the case of a tie, the area director is entitled to only one additional vote to break the tie.

### ▲▲ Area Director Election Secret Ballots

Voting is by secret ballot. Any candidate who receives a majority of the votes cast is declared elected. In the event no candidate receives a majority of the votes cast for a contested office, voting continues without the name of the candidate who received the fewest votes. This procedure continues until one of the candidates receives a majority of the votes. The area director then notifies the district director of election results.

## ▲▲▲▲ ELECTIONS OF INTERNATIONAL LEADERS AND AMENDMENTS

District directors, program quality directors, club growth directors, region advisors, and international officers and directors may not endorse or officially support any international officer or director candidate. See **Policy and Protocol, Policy 9.1: International Campaigns and Elections**, 8. International Candidate Endorsements.

### ▲ International Leader Election Proxies

Toastmasters International sends an official proxy email to each club president for the Annual Business Meeting at International Convention. If a club member plans to attend the meeting, the club president or secretary may assign the member as the club's proxyholder. A proxy may also be assigned to the district director currently in office or an active Toastmasters member from another club.

#### **BYLAWS OF TOASTMASTERS INTERNATIONAL**

##### **Article X: Annual Business Meeting, Section 2: Proxies**

Any member club, if unrepresented at the Annual Business Meeting by a delegate or alternate from among its own active individual members, may designate as its proxyholder, in writing, any active individual member of any other member club. Upon presentation of proper credentials, such proxyholder shall have the right to vote for the club represented in addition to any other right to vote which such proxyholder may have. All forms of proxy designation must conform to policies set by the Board of Directors in compliance with the California Nonprofit Public Benefit Corporation Law. All proxyholders must be in good standing with Toastmasters International under Article III, Section 8 of these Bylaws.

The proxy holder must cast the club's votes as directed at the Annual Business Meeting. If the assigned proxyholder cannot attend the Annual Business Meeting, he or she must notify the club president or secretary so the proxy can be reassigned to a member who will be in attendance.

If you have questions about proxies at International Convention, please contact [proxyinfo@toastmasters.org](mailto:proxyinfo@toastmasters.org).

## Amendments to the Bylaws of Toastmasters International

Sometimes amendments to the **Bylaws of Toastmasters International** are voted on during the Annual Business Meeting.

### **POLICY AND PROTOCOL**

#### **Policy 9.1: International Campaigns and Elections, 12. International Proxies and Credentials, C**

When amendments to the Bylaws are to be voted on, there is a method in the proxy process for a club to indicate how it wishes its votes to be cast.

If no choice is indicated, the delegate is free to cast the votes as he or she believes will be in the best interest of the organization.

## SPEECH CONTESTS

The program quality director is the coordinator and supervisor of the district's speech contests; as such, encourage members to participate in the International Speech Contest and other contests your district may conduct. Strive to be your district's primary expert in the speech contest rules and be prepared to answer rules questions and fairly manage disputes as they arise.

### Speech Contest Resources

*Speech Contest Rulebook* (Item 1171)

[www.toastmasters.org/1171](http://www.toastmasters.org/1171)

Speech contest questions

[speechcontests@toastmasters.org](mailto:speechcontests@toastmasters.org)

## DISTRICT VISITS

Each year, international officers, international directors and region advisors visit districts. These visits give district leaders an opportunity to observe visiting international- and region-level leaders in action.

### INTERNATIONAL OFFICER AND DIRECTOR VISITS

International officers and directors conduct district visits as ambassadors promoting the Toastmasters organization. They help the district by leading club-building visits, presenting corporate recognition awards and representing the organization at district events. These visits generally occur during district conferences.

District leaders and World Headquarters staff work together to coordinate visits. A district must accept a visit from an international officer or director. Once a district accepts a visit, World Headquarters, the visiting dignitary and district leaders have a

## INTERNATIONAL OFFICERS AND DIRECTORS

International officers and directors are the 19 elected members of the Board of Directors. International officers include the:

- International President
- International President-Elect
- First Vice President
- Second Vice President
- Immediate Past International President

conference call to discuss plans for the visit. District leaders are asked to schedule club-building opportunities, media events and corporate recognition visits to ensure the district visit is a success.

## Corporate Recognition Visits

A corporate recognition visit is a meeting between an international officer or director, experienced district leader and high-ranking official of a corporation with an existing club.

The purpose of this visit is to provide tangible recognition of Toastmasters International's appreciation of the organization's support. For more information about this award and eligibility requirements, visit [www.toastmasters.org/districtvisits](http://www.toastmasters.org/districtvisits).

## REGION ADVISOR VISITS

Region advisors visit districts to provide marketing support and expertise, and to expand district leaders' capacity to grow clubs. During visits, region advisors help district leaders by teaching marketing skills and focusing on goal planning. These visits generally occur during Toastmasters Leadership Institutes or district executive committee meetings.

Region advisors and district leaders collaborate to plan region advisor visits. Districts are asked to schedule club-building opportunities for the region advisor to attend with the club growth director. This provides an opportunity for the club growth director and team to lead the meeting and receive feedback from the region advisor. This training will help the club growth team develop marketing skills while promoting Toastmasters.

## District Visit Resources

Officer and director district visits	<a href="http://www.toastmasters.org/districtvisits">www.toastmasters.org/districtvisits</a>
Officer and director district visit questions	<a href="mailto:boardcontact@toastmasters.org">boardcontact@toastmasters.org</a>
Region advisor district visits	<a href="http://www.toastmasters.org/radistrictvisits">www.toastmasters.org/radistrictvisits</a>
Region advisor district visit questions	<a href="mailto:regionadvisor@toastmasters.org">regionadvisor@toastmasters.org</a>
List of company-sponsored clubs	<a href="mailto:corporaterelations@toastmasters.org">corporaterelations@toastmasters.org</a>
Logos, Images and Templates	<a href="http://www.toastmasters.org/logos">www.toastmasters.org/logos</a>
Features, Benefits and Value	<a href="http://www.toastmasters.org/fbvchart">www.toastmasters.org/fbvchart</a>

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# NOTES

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