

# District Operations Manual



*Version 2.2*  
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## **SECTION I - DESCRIPTION OF MANUAL**

### **1.1 PURPOSE**

This Manual is intended as a reference source for the operations and processes of Founder's District, hereafter called the District, in Region 2 of Toastmasters International. The District serves the majority of Orange County, south of Ball Road, in Southern California.

### **1.2 AUTHORIZATION**

The procedures outlined herein are based on the authorizations and requirements of the District Administrative Bylaws. They incorporate the administrative practices that have evolved into recognized standard procedures. Should a discrepancy exist between this document and materials published by Toastmasters International, the materials from Toastmasters International have the final authority.

### **1.3 REVISIONS**

The District Administrative Policies Committee is charged with the responsibility to review this manual periodically and make recommendations for updating it. Portions may be rewritten by the Committee as mandated by the District Director, the District Executive Committee, or the District Council.

## 1.4 REFERENCES

This Manual was updated using the following sources that are available online at Toastmasters International Website.

Toastmasters International Governing Documents:

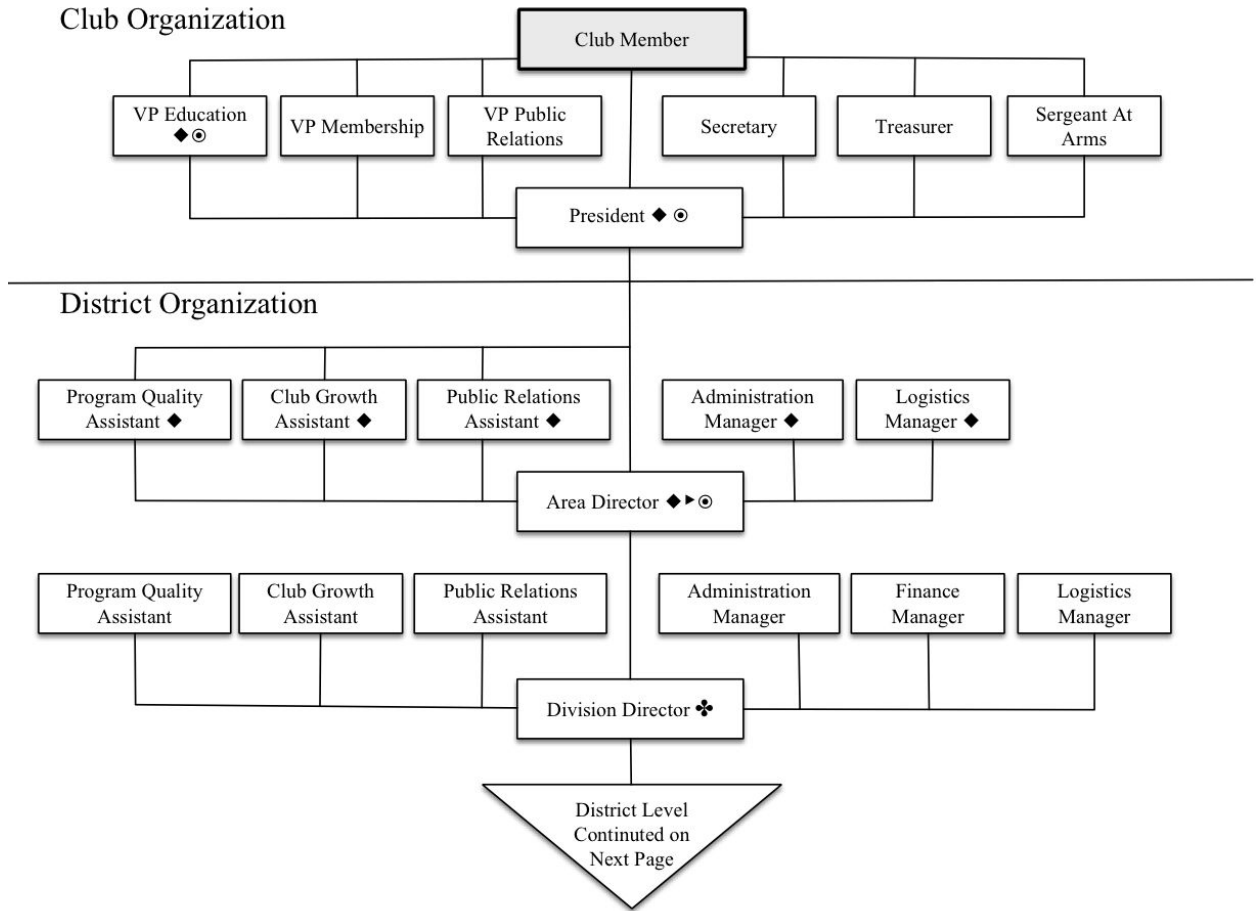
<https://www.toastmasters.org/leadership-central/governing-documents>:

- “Articles of Incorporation and Bylaws of Toastmasters International-modified August 23, 2019”.
- “District Administrative Bylaws-Amended August 23, 2019”.
- “Club Constitution for Clubs of Toastmasters International-Amended August 23, 2019”
- “Policy and Protocol” - Amended December 4, 2019.
- “District Leadership Handbook”, Revised March 2019 Catalog item 222.
- “Club Leadership Handbook” – Revised March 2019, Catalog item 1310.

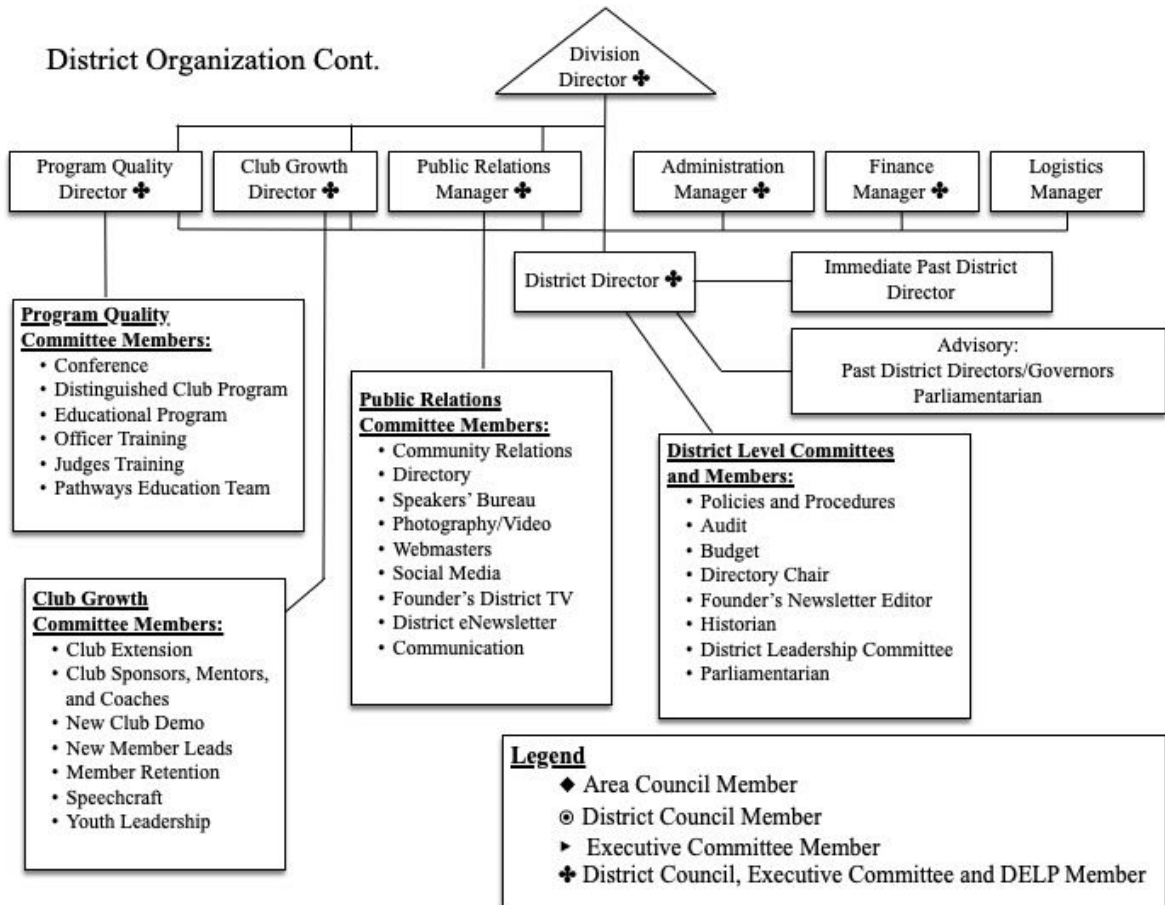


## SECTION II - DISTRICT ORGANIZATION

### 2.1 DISTRICT ORGANIZATIONAL CHART



District Organization Cont.



## **2.2 DISTRICT OFFICERS**

District officers include District Director, Program Quality Director, Club Growth Director, Public Relations Manager, Division Directors, Administration Manager, Finance Manager, and Area Directors.

- a. Authority through District Administrative Bylaws, Article VIII also referred to in the Articles of Incorporation and Bylaws found online only.
- b. Reference Guide Toastmasters International, District Leadership Handbook, Catalog No. 222, current year.

## **2.3 DISTRICT ALIGNMENT**

- a. Refer to District Administrative Bylaws, Article VI: Area and Division Organization.
- b. Refer to annual reports of District Club Alignment Committee in District Council meetings.

### **2.3.1 Authorization**

District Administrative Bylaws, Article VI, the Bylaws of Toastmasters International Article XII: Districts, Section 1 and 3(e), and the District Leadership Handbook, Catalog No. 222 – District Structure

### **2.3.2 Purpose**

To align the clubs, areas, and divisions within the district.

### **2.3.3 Procedural Rules**

Procedural rules are in the documents cited above and online under “District Structure” on the Toastmasters website, Article XII, Sections 1, and 3(e) of the Bylaws of Toastmasters International and in Article VI of the District Administrative Bylaws.

## **SECTION III - COMMITTEES**

### **3.1 DISTRICT EXECUTIVE COMMITTEE (DEC)**

#### **3.1.1 Authorization**

District Administrative Bylaws, Article XI, (a). District Leadership Handbook, Catalog No. 222, District Government section. Protocol 7.1 Section 5.

#### **3.1.2 Purpose**

The District Executive Committee shall have all functions and powers of the district council except such powers as may be reserved by the district council to itself. This committee shall review and approve the District Success Plan, present the district budget to the district council for approval, oversee the district's financial operation, recommend the alignment of clubs into areas and divisions, review recommendations and reports of district committees, and review ethics and conduct issues as needed.

#### **3.1.3 Membership**

All Elected District Officers (District Director, Program Quality Director, Club Growth Director and Division Directors), Immediate Past District Director, and appointed officers: District Administration Manager, District Finance Manager, Public Relations Manager, and Area Directors.

#### **3.1.4 Responsibility**

Perform administrative functions for and tasks assigned by the District Council, and recommend actions required for District administration to the District Council for their consideration and disposition.

#### **3.1.5 Attendance**

Guests may attend the meetings only by approval of the District Director - Protocol 7.1 5(G).

### **3.1.6 Procedure**

- a. Meets a minimum of 4 times a year, typically, in August, October, January, and April.
- b. Gives interim approval of appointed officers.
- c. Receives and evaluates reports submitted by all standing committees.
- d. Fills any vacancies in any elective office, based upon the recommendation of the District Director and subject to the approval of the District Council.
- e. Approves budget.

### **3.1.7 Quorum**

A majority of the committee constitutes a quorum.

## **3.2 DISTRICT LEADERSHIP COMMITTEE**

### **3.2.1 Authorization**

District Administrative Bylaws, Article XI (b). District Leadership Handbook, Catalog No. 222, District Events section, Elections subsection. Protocol 9.0 Section 2.

### **3.2.2 Purpose**

To find the best candidates possible and prepare a slate of eligible candidates for elective office to be placed in nomination at the Annual District Council meeting.

### **3.2.3 Procedural Rules**

Procedural rules are in the Protocol 9.0 Sections 1 through 5 of the Toastmasters Governing Documents.

### **3.3 AUDIT COMMITTEE**

#### **3.3.1 Authorization**

District Administrative Bylaws Article XI, (c). Article XII, and the District Leadership Handbook, Catalog No. 222, Financial Structure and Processes Section, Audits subsection.

#### **3.3.2 Purpose**

Audit the financial transactions of the District as mandated by Toastmasters International.

#### **3.3.3 Membership**

At least three Toastmasters who are not members of the District Executive Council, including a committee chair. Members are appointed by the District Director.

#### **3.3.4 Responsibility**

Prepare two audit reports, Mid-Year Audit Report and Year-End Audit Report, on the forms and within the time frame required by Toastmasters International.

#### **3.3.5 Procedure for District Audit:**

- a. A complete section with detailed procedures is found in Protocol 8.4, District Fiscal Management, Section 6, District Audit.
- b. The Audit Committee Guidelines document contains guidelines and the submission form. <https://www.toastmasters.org/resources/audit-committee-guidelines>

### **3.4 PROGRAM QUALITY COMMITTEE**

#### **3.4.1 Authorization**

District Administrative Bylaws, Article XI, (d). District Leadership Handbook, Catalog No. 222.

#### **3.4.2 Purpose**

Implement an Educational Program for the District.

### **3.4.3 Membership**

Program Quality Director as Chair, and shall include Educational Assistant for each Division and Committee Chairs as appointed by the District Director at the recommendation of the Program Quality Director.

### **3.4.4 Responsibility**

Promote manual and Pathways level completions in all clubs of Founder's District; assist and incentivise members to achieve educational awards; assist Clubs, Areas and Divisions with educational programming and training; prepare educational programs for the District Conference, Division Council and Executive Committee meetings.

### **3.4.5 Attendance**

Guests may attend the meetings by approval of the committee.

### **3.4.6 Procedure**

Hold meetings to accomplish the following:

- a. Promote the educational goals of the District.
- b. Plan and implement programs to encourage the accomplishment of educational recognition.
- c. Implement training programs to ensure speech contests are conducted according to Toastmasters International contest rules.
- d. Plan leadership training for Club Officers, Area Directors and Division Directors.
- e. Provide resources for club educational programs.
- f. Plan, promote L.A.C.E. including traditional mailing to all members.

### **3.4.7 Other Committee Chairs**

May be appointed from time to time as may be deemed advisable by the District Director or the District Council. Such committee chairs may include but are not limited to: LACE (Leadership and Communication Excellence)/TLI (Toastmasters Leadership Institute)

Training, District Conference, Trained Judges, District Contest, Educational Program, and Distinguished Club Program reporting to Program Quality Director.

## **3.5 CLUB GROWTH COMMITTEE**

### **3.5.1 Authorization**

District Administrative Bylaws, Article XI, (d). District Leadership Handbook, Catalog No. 222.

### **3.5.2 Purpose**

This committee is responsible for the development, direction, and coordination of an overall marketing plan necessary for building new member clubs; the increase in individual membership; and retaining clubs in the district.

### **3.5.3 Membership**

Club Growth Director as Chair, shall include Marketing Assistant for each Division and Committee Chairs as appointed by the District Director at the recommendation of the Club Growth Director.

### **3.5.4 Responsibility**

Assist Clubs, Areas and Divisions in developing new clubs and increasing membership.

### **3.5.5 Attendance**

Guests may attend the meetings by approval of the committee.

### **3.5.6 Procedure**

Hold meetings to accomplish the following:

- a. Establish membership campaigns to promote growth throughout the District and provide member leads to Clubs.
- b. Assist Clubs, Areas and Divisions in their effort to strengthen their membership through participation, attendance and retention.



- c. Implement methods to monitor the accomplishments of the District marketing goals.
- d. Monitor the timely submittal of semiannual dues.

### **3.5.7 Other Committee Chairs**

May be appointed from time to time as may be deemed advisable by the District Director, or the District Council. Such committee chairs may include but are not limited to: Club Extension, Demo Meeting, Club Sponsor/Mentor, Club Specialists, Youth Leadership Program Chair, Member Leads, Member Retention, Speechcraft, Club Coach, and Special Projects reporting to this Committee.

## **3.6 PUBLIC RELATIONS COMMITTEE**

### **3.6.1 Authorization**

District Administrative Bylaws, Article XI, (d).

### **3.6.2 Purpose**

Responsible for the development and administration of a public relations program that will provide improved understanding by individual members of clubs and the public of the opportunities available for personal development in the Toastmasters International Communication and Leadership Programs. See District Administrative Bylaws, Article VIII, (e), District Public Relations Manager responsibilities.

### **3.6.3 Membership**

The Public Relations Manager and Committee Chairs are members of the PR Team.

### **3.6.4 Responsibility**

Work in support of the District Director, Program Quality Director and Club Growth Director in an effort to publicize events to members and outside communities. Ensure Toastmaster International Brand Standards are communicated to clubs and adhered to within the District.

### **3.6.5 Attendance**

The Public Relations Manager meets with his/her team during the year and guests may attend the meetings by approval of the committee. The PR Manager is also a member of the District Executive Committee.

### **3.6.6 Procedure**

Hold meetings to accomplish the following:

- a. Recommend a Public Relations program to the DELP Committee.
- b. Evaluate current projects used by Clubs, Areas, Divisions and the District for achieving favorable public relations.
- c. Promote the "Communication and Leadership Award" program for community and company leaders.
- d. Promote members' participation through Speakers' Bureau.
- e. Promote club public relations activities, such as club website, public service announcements, public relations videos.

### **3.6.7 Other Committee Chairs**

May be appointed from time to time as may be deemed advisable by the District Director, or the District Council. Such committee chairs may include but are not limited to: Public Relations Advisor, Judges Bureau, Mail Data Chair, Communications Chair, Speakers Bureau, Newsletter Editor, Photographers, District TV Chair, Videographers, Webmaster Chair, and Social Media Chair.

## **3.7 ADMINISTRATIVE POLICIES & PROCEDURES COMMITTEE**

### **3.7.1 Authorization**

District Administrative Bylaws, Article XI (d).

### **3.7.2 Purpose**

Review all Club, Area, Division and District operations and make recommendations for improvements.

### **3.7.3 Membership**

At least one Past District Director or Past District Governor, appointed as Chair, and at least two members who are Past District Officers or Past District Committee Chairs.

### **3.7.4 Responsibility**

Review District Operations Manual within Founder's District as required or directed by the District Director. Recommend changes to the District Executive Committee.

### **3.7.5 Attendance**

Guests may attend the meetings by approval of the Committee. Elected District Officers may attend.

### **3.7.6 Procedure**

- a. Perform specific tasks assigned by the District Director.
- b. Submit a report describing recommended changes to the DELP Committee for review. This report shall include the date on which the recommended changes are to take effect.
- c. Submit a report, as reviewed by the DELP Committee, to the District Executive Committee.
- d. Submit a report, as approved by the District Executive Committee, to the District Council.
- e. At any point in the approval process the recommended changes may be amended.
- f. Incorporate changes as amended and approved by the District Council into the District Operations Manual.

### **3.7.7 Notice**

Proposed changes approved by the District Executive Committee shall be published by the District Executive Committee at least 21 days prior to the District Council Meeting.

### **3.7.8 Proposed Changes**

Proposed changes from non-committee members must be submitted to the Chairman of the committee by September 30 for consideration in the current Toastmaster Administration July-June year. Changes mandated by Toastmasters International are automatic.

## **3.8 DISTRICT COMMUNICATIONS — E-NEWSLETTER, E-MAIL, TEXTING, SOCIAL MEDIA, BRAND COMPLIANCE AND WEB SERVICES**

### **3.8.1 E-Newsletter**

The Founder is the semi-annual e-newsletter of Founder's District. The name "The Founder" was first named as the District Bulletin in 1963-1964 by the late Past District Governor, Donald D. Ross, DTM.

#### ***3.8.1.1 Authorization***

District Administrative Bylaws, Article XI (d) and District Leadership Handbook, Catalog No. 222 – Public Relations and Marketing.

#### ***3.8.1.2 Purpose***

Provide communication between the District and the members.

#### ***3.8.1.3 Membership***

The Editor, Public Relations Manager, and District Director (publisher).

#### ***3.8.1.4 Responsibility***

Create and cause *The Founder* to be distributed to the members of the District, upon approval of the District Director, who is the publisher.

### ***3.8.1.5 Procedure***

- a. Establish deadlines for receiving articles and news information, and editing copy to accommodate effective layout and content.
- b. The Founder is a semi-annual newsletter.
- c. Approved by the District Director before publishing.
- d. Once final, send to the Founder's District webmaster to post on the Founder's District website.

## **3.8.2 Electronic Communications Committee**

### ***3.8.2.1 Authorization***

District Administrative Bylaws, Article XI (d) and District Leadership Handbook, Catalog No. 222.

### ***3.8.2.2 Purpose***

Provide and enhance communications, mediated by Internet and other electronic technologies, among District leaders, the District and Clubs, and the community at large.

### ***3.8.2.3 Membership***

The Public Relations Manager would be responsible for this committee. Includes an assistant as a general advisor, who is a Founder's past District officer (if practical); and other members assigned by the Public Relations Manager and the District Director.

### ***3.8.2.4 Responsibility***

Manage District communications mediated by Internet and other electronic technologies.

### ***3.8.2.5 Procedure***

- a. Maintain the District's rights to the use of the Internet domain name "**foundersdistrict.org**," "**foundersdistrict.tv**" and all electronic brands associated with the District. Monitor this annually, or more frequently as needed.

- b. Maintain the website [foundersdistrict.org](http://foundersdistrict.org) and [foundersdistrict.tv](http://foundersdistrict.tv) under the direction of the District Director with advice from the DELP committee.
- c. Perform duties as prescribed by the District Council.
- d. Produce an online version of *The Founder* newsletter in cooperation with *The Founder* editor upon approval of the District Director who remains the publisher.
- e. Maintain email aliases, texting phone numbers, and mailing lists to promote communications between the District Council and District officers.
- f. Maintain the District's Facebook, Instagram, LinkedIn and Twitter Social Media channels. Provide authority for clubs, members and outsiders to post to these social media channels. Provide content monitoring, and remove inappropriate content.
- g. Ensure the District, clubs and members remain in compliance with Toastmasters Brand Standards, as outlined in Toastmasters Brand Portal found here: <https://www.toastmasters.org/resources/brand-portal>
- h. Ensure compliance with Toastmasters International policies as well as State and Federal privacy laws.
- i. Conduct an annual review to determine the District's needs in regard to email accounts, texting lists, and forwarding addresses as required. Make a recommendation to the District Director, Program Quality Director, and the Club Growth Director for approval. Document all changes to promote an orderly transition each year.
- j. The Public Relations Manager shall provide an annual report to the District Council possible current or future uses of communication tools.

### **3.9 OTHER COMMITTEES**

#### **3.9.1 Authorization**

District Administrative Bylaws, Article XI, (d). District Leadership Handbook, Catalog No. 222.

#### **3.9.2 Other Committees**

- a. Other District Committees in District Leadership Handbook, Catalog No. 222 under District Committees.

- b. The Toastmasters International website has numerous descriptions online.

### **3.9.3 Other Committee Chairs**

May be appointed from time to time as may be deemed advisable by the District Director, or the District Council. Such committee chairs may include but are not limited to: Parliamentarian, District Directory, Alignment Chair, Data Chair, District Calendar, Proxy & Officer List, Web Site Coordinator, Data, Protocol, Historian, Area & Division Director Advisor, and Project Manager reporting to the Director.

## **3.10 DISTRICT ELECTED LEADERS Plus PUBLIC RELATIONS MANAGER (DELP)**

### **3.10.1 Authorization**

District Administrative Bylaws, Article XI, (d).

### **3.10.2 Purpose**

Develop the planning necessary for District management and administration.

### **3.10.3 Membership**

Elected District Officers (District Director, Program Quality Director, Club Growth Director, and Division Directors), District Administration Manager, District Finance Manager, District Logistics Manager, District Public Relations Manager, including any Toastmaster at the discretion of the District Director.

### **3.10.4 Responsibility**

Recommend to the District Executive Committee (DEC) ideas, solutions and policies as directed by the District Director.

### **3.10.5 Attendance**

Guests may attend these meetings with approval from the DELP.

### **3.10.6 Procedure**

Provide planning and approval for:

- a. District Budget.
- b. Liaison between District, Divisions, Areas and Clubs.
- c. Assist the District Director in evaluating the performance of various committees.
- d. Realignment, appointed officers, and District Operations Manual changes.

### **3.10.7 Quorum**

A majority of the elected District Officers constitutes a quorum, and must include one of the following Officers: District Director, Program Quality Director or Club Growth Director.

## **3.11 CANDIDATE SEARCH COMMITTEE**

### **3.11.1 Authorization**

District Administrative Bylaws Article XI, (d) and Article VII. District Leadership Handbook – District Leader Candidates. This Committee is assembled as needed by the District Director.

### **3.11.2 Purpose**

Search out eligible candidates to fill vacated elective District offices.

### **3.11.3 Membership**

Three members of the DELP plus three Past District Governors or Directors. The Chair shall be the most recent available Past District Director. Members expressing interest in the vacant office may not serve on the committee.

### **3.11.4 Responsibility**

Verify qualifications and recommend to the DELP Committee candidates available to fill any District elective office that becomes vacant for any reason.



### **3.11.5 Attendance**

Guests may attend the meetings by approval of the Committee.

### **3.11.6 Procedure**

The Candidate Search Committee will:

- a. Collect and record the names of eligible candidates willing to serve in the vacant office.
- b. Verify the qualifications of eligible candidates.
- c. Submit the list of eligible candidates to the DELP Committee within one week after the formation of the Search Committee.
- d. DELP Committee shall select and recommend to the District Executive Committee a single candidate from the list submitted by the Candidate Search Committee.
- e. The District Executive Committee shall then approve or disapprove the appointment of the candidate recommended by the DELP Committee. Disapproval requires the DELP Committee to submit an alternate candidate from the list supplied by the Candidate Search Committee.
- f. The District Council shall then approve or disapprove the appointment of the candidate submitted by the DELP Committee and approved by the District Executive Committee.

## **SECTION IV - DISTRICT FINANCES**

### **4.1 GENERAL**

#### **4.1.1 Authorization**

District Administrative Bylaws, Articles XII, (a), District Leadership Handbook, Catalog No. 222, Finance Manager

#### **4.1.2 District Leader Expenses**

Expenses paid by Toastmasters see Governing Documents of Toastmasters International, “Policy and Protocol”, Protocol 8.1, 8.4, Policy 8.3, 8.4, 8.5, 8.6, in the same document.

#### **4.1.3 District Bank Statements**

All district bank statements, canceled checks, and any other financial records are the District's property.

#### **4.1.4 District/Division Budgets**

District Trio and Finance Manager shall develop a budget for the District and Divisions under the guidance of the Toastmasters International District Finance team. Expenditures will be maintained within the limits of the adopted budget and guidelines.

#### **4.1.5 Financial Records**

Financial records are to be maintained in accordance with the guidelines specified by the Audit Committee Guidelines document and Toastmasters International District Finance team.

#### **4.1.6 District Contracts**

Any district contract is considered an obligation for future funds dispersal and requires the District Director's signature. A single expenditure (or contract) in excess of \$500 must be authorized in writing, in advance by the District Director and either the Program Quality Director or Club Growth Director, in consultation with the District Finance Manager.

#### **4.1.7 Donation of Funds**

On February 12, 2012 the Board of Directors added to the Policy and Protocol, District Fiscal Management - Protocol 8.4. District funds may not be donated to any fund, including the Ralph C. Smedley Memorial Fund.

## **4.2 BUDGETS**

### **4.2.1 Preparation**

Each new district administration prepares the district yearly budget using forms supplied by Toastmasters International District Finance Team.

### **4.2.2 DEC and District Council Approval**

The proposed budget shall be approved at the first meeting of the District Executive Committee (DEC) and then ratified by the District Council (DC) prior to the September 30 deadline.

### **4.2.3 Submission**

The approved budget must be signed by the District Director, Program Quality Director, Club Growth Director and District Finance Manager before submitting to Toastmasters International by September 30.

## **4.3 DISTRICT RESERVE ACCOUNT**

### **4.3.1 Source of Funds**

District revenue is derived from shares of District per capita fees collected by Toastmasters International and is held in the District Reserve Account at Toastmasters International. A minimum of 25% of the funds will be held in the District Reserve Account for the incoming District Administration. The District does not receive new funds until after October semi-annual club dues are paid.

### **4.3.2 Availability**

District Reserve Account funds are available to the current District administration when criteria set by the Toastmasters International Board of Directors has been met.

### **4.3.3 Withdrawal of Funds**

District Reserve Account funds may be withdrawn in three (3) ways:

- a. By a request signed by both the District Director and the District Finance Manager.
- b. To pay for materials and supplies ordered on the District Order Form or the Toastmasters International online store authorized by the District Director.
- c. District Reserve credit card by District Director or Program Quality Director. Transactions involving the District Reserve credit card are approved in Concur by District Finance Manager and District Director (for the Program Quality Director's credit card use) or by the District Finance Manager and Program Quality Director (for the District Director's credit card use).

#### **4.3.4 Deductions**

Materials and supplies ordered from Toastmasters International are deducted from the reserve account the month they are shipped.

### **4.4 DISTRICT BANK ACCOUNTS**

Toastmasters International "Policy and Protocol"-- Protocol 8.4 "District Fiscal Management" governs District Bank accounts and financial transactions. Concur is the software tool used by Toastmasters International to process expense reimbursements of Founder's District leaders.

Regarding District Checking Account,

- a. The District Director, District Finance Manager, and either the Program Quality Director or Club Growth Director must be signatories on the bank account.
- b. Every disbursement requires two signatures--normally, the District Director and the District Finance Manager. If the check is to be written to the District Director or District Finance Manager, the second signature is to be a Program Quality or Club Growth Director.
- c. If the bank debit card is used for disbursements, two email approvals must be obtained in advance. For debit card usage by the District Finance Manager, the pre-approval emails must come from the District Director and Program Quality Director. For debit card usage by the District Director, the pre-approval emails must come from the District Finance Manager and Program Quality Director.

- d. The District Director approves all fund disbursements.
- e. A new signature card shall be prepared, signed, and filed with the bank on July 1 of the current year or as soon as practicable thereafter. This action is the responsibility of the incoming administration.

## **4.5 REIMBURSABLE EXPENSES**

### **4.5.1 Authorization**

District Administrative Bylaws Article XII

### **4.5.2 Expenses**

Expenses must be authorized in advance by the District Director, Program Quality Director, Club Growth Director, or the Division Director, as applicable to their areas of responsibilities.

### **4.5.3 Materials**

Materials, copy work, awards, and postage must fit the following categories:

- a. Membership building.
- b. Educational sessions.
- c. Materials and awards for speech contests.
- d. Merit awards for performance.
- e. District recognition awards.

### **4.5.4 International Convention and Mid-Year Training Travel**

Travel expenses are not authorized except for District Officers expected to attend the International Convention and Mid-Year Training. Travel for Immediate Past District Director is allowed and should be included in the current year's budget if the District achieves Distinguished District status or better in prior year. Authorized expenses are defined in the District Leadership Handbook under Travel Reimbursement.

## **4.6 MEALS AND LODGING**

### **4.6.1 Meals**

- a. Budget permitting, the District Executive Committee meals will be provided to attendees. Attendees may include specially invited guests and Division/Area staff approved by the District Director.
- b. Budget permitting, District Director staff meeting meals may be provided. The District Director sets attendance. Types of staff meetings include District elected officers' staff meetings and planning for the year, conferences, and educational sessions.

### **4.6.2 Lodging**

- a. Budget permitting, to facilitate presenting and coordinating the Spring Conferences, the District Director, Program Quality Director, Club Growth Director, and Finance Manager may be authorized to one night lodging at the conference site and up to two nights if travel is more than 25 miles. Lodging for the Region Advisor and International Director on official visits is included to the extent that Toastmasters International does not reimburse his/her expenses.
- b. Budget permitting, to aid conference operation, the Administration Manager, Conference Co-Chair and Logistics Manager may be authorized one night's lodging at the conference location. Out-of-town presenters may be authorized for two night's lodging at the conference location if travel is more than 50 miles one way from the presenter's residence to the conference location, at the discretion of the District Director.

## **4.7 TRAVEL ALLOWANCES**

### **4.7.1 Authorization**

Toastmasters International "Policy and Protocol" Policy 8.3 -District Leader Expenses and Toastmasters International Bylaws Article XII, Section 2. These will guide the process for travel reimbursements. Their purpose is to guide the process for travel reimbursement.

#### **4.7.2 Purpose**

To guide the process for travel reimbursement

#### **4.7.3 Mileage Allowances**

Mileage allowances of District Elected Officers, District Finance Manager, and District Administration Manager are allowed if they are included in the approved budget of the year by District Council. Mileage allowances and their amounts are at the direction of Toastmasters International District Finance.

#### **4.7.4 Keynote Speaker Travel Allowance**

Airfare or mileage permitted if included in the approved budget for the year.

### **SECTION V - GENERAL PROCEDURES**

#### **5.1 PROXY HANDLING, INTERNATIONAL**

##### **5.1.1 Authority**

Toastmaster International Administrative Bylaws, Article X, Section 2: Proxies, and online District Leadership under Elections of International Leaders and Amendments. Proxy handling for International cannot be changed or amended by a District but is set by Toastmasters International. Refer to the named documents.

#### **5.2 AREA DIRECTOR SELECTION**

##### **5.2.1 Authorization**

District Administrative Bylaws, Article VII, (c). District Leadership Handbook, Catalog No. 222.

##### **5.2.2 Purpose**

Identify members seeking leadership experience, who meet the qualifications as outlined in the District Administrative Bylaws Article VII (d).

### **5.2.3 Selection of Area Directors**

The District Administrative Bylaws provides for the selection of Area Directors. The District follows recommendations of Toastmasters International that the District Director appoints Area Directors.

### **5.2.4 Recommendation and Appointment Procedures**

By May 15, each Area Director shall submit to the District Director written recommendations for a successor. These recommendations shall be forwarded to the District Director-elect for making Area Director appointments.

## **SECTION VI - SPECIAL ACTIVITIES & PROCEDURES**

### **6.1 INSTALLATION, RECOGNITION & AWARD PROGRAM(S)**

#### **6.1.1 General**

The type of program to be held is at the discretion of the District Director-elect.

#### **6.1.2 Purpose**

To provide a forum for installing the incoming District Officers and recognizing the outgoing District Officers.

#### **6.1.3 Installation Program**

- a. Attendance shall be open to all District members and guests.
- b. Program shall be held in June.
- c. The top three incoming District Officers may each choose his/her installing officials.
- d. The incoming District Director shall choose installing officials for all other incoming officers.
- e. The new District Director may present an acceptance speech.



- f. It is the responsibility of the incoming District Director and staff to plan and carry out the program for installation.

#### **6.1.4 Recognition Program**

- a. Attendance shall be open to all District members and guests.
- b. Program may be held in conjunction with the installation or held separately.
- c. It is the responsibility of the outgoing District Director to plan and carry out the program for recognition of Toastmaster accomplishments.
- d. Special Recognition should be presented for:
  - 1. Toastmaster of the Year
  - 2. Area Director of the Year
  - 3. Division Director of the Year

### **6.2 TOASTMASTER OF THE YEAR**

- a. Checklist - District Leadership Handbook, Catalog No. 222, completed by Division Director and presented to District Director by mid-June.
- b. Eligibility - Generally every Toastmaster, except District Director, Program Quality Director, Club Growth Director, Division and Area Directors.
- c. Selection - by District Director based on recommendations of Area, Division, Program Quality Director and Club Growth Director, and Immediate Past District Director.

### **6.3 AREA DIRECTOR OF THE YEAR**

- a. Checklist - District Leadership Handbook, Catalog No. 222, submitted to District Director prior to recognition program.
- b. Eligibility - Current Area Directors.
- c. Division Director may choose to recognize Area Director of the Year within each Division.
- d. District Selection
  - 1. May be selected from a group of Division candidates.

2. By District Director, based on recommendations of Division Director, Program Quality Director, Club Growth Director and Immediate Past District Director.

#### **6.4 DIVISION DIRECTOR OF THE YEAR**

- a. Checklist - District Leadership Handbook, Catalog No. 222, submitted to District Director prior to recognition program.
- b. Eligibility - Current Division Directors.
- c. Selection - by District Director, based on recommendations of Program Quality Director, Club Growth Director and Immediate Past District Director.

## APPENDIX A REVISION HISTORY

<b>Date</b>	<b>Version</b>	<b>Description</b>	<b>Author</b>
04/28/2007	1.0	Multiple changes	L. Kelly
04/26/2008	1.1	Numerous grammatical/ typographical/ formatting changes; updated history; reinstated district communication chart 3.1; revised paragraph 4.8.2; clarified paragraph 5.6.2.b; clarified paragraph 7.1.5	N. Cook
5/26/2008	1.2	Multiple Changes; Added Roy D Graham, DTM, PID Conference Attendance Award Recipients.	N. Cook
4/25/2009	1.3	History updates, changes in e-mail and web services.	W. Springer
4/24/2010	1.4	Multiple updates and changes according to the new rules for Toastmasters international especially about the Regional Conferences.	C. Gardner

3/15/2011	1.5	The Nominating committee duties were adjusted to be in line with International. The proxy section for International reflects the new approach by International. Starting in 2011, the theme for the District has been eliminated. The updated alignment of clubs is being updated and assignments of new clubs will now follow International rules. The new Helen Blanchard Award was added. Minor changes were done in the LGET and LGM sections.	C. Gardner K. Teenor B. Hudack
3/2012	1.6	History was updated to provide a current account of activities between March 2011 and March 2012. Travel Allowances Section 5.7 was adjusted to be in line with International's Policy.	K. Teenor
3/2014	1.7	The history was moved online under the Founder's website. It is also available here. The names of the references from Toastmasters were updated. Bob Hudack has the alignment separately.	C. Gardner K. Teenor

4/2015	1.8	<p>- From previous versions - Section II – History of Founder’s District is completely removed from the manual. It is available on Founder’s website.</p> <p>Sections are renumbered to keep continuity.</p> <p>- The levels of educational accomplishments in section 4.4, are removed to allow the new 2015 levels.</p> <p>- Section 3.9 – Past District Governor's Advisory Committee is no longer part of the District Committees and it has been removed.</p> <p>- Section IV – District Finances has been revised. It includes references for expenses paid by Toastmasters and paid by the District in Policy 8.3.</p> <p>It modifies the previous information to match Policy 8.4 and Protocol 8.4 in the District Administration Bylaws.</p> <p>- Under District Bank Accounts, references were updated and a few titles were changed to match Toastmasters Policies.</p> <p>Under section 4.5 - Reimbursable Expenses, the Toastmasters reference was added.</p> <p>- Section 4.7 – Travel Allowances was changed to refer to the Toastmasters International Policies and Protocol Policy 8.3 District Leader Expenses. The details no longer match the rules so sections 4.7.2 through 4.7.4 and table 4.7 were removed because they are confusing and inaccurate.</p> <p>- Section 5.2 – Area Directors Selections was updated to match District Administrative Bylaws</p> <p>The new titles for district officers are added: District Director, Program Quality Director, Club Growth Director, Division Director.</p>	<p>C. Gardner K. Teenor</p>
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4/2016	1.9	<p>Removed the extra Governors titles and changed the Secretary and Treasurer titles to Administration Manager and Finance Manager. Also change Public Relations Officer to Public Relation Manager.</p> <p>Updated all references to Toastmasters' documentations.</p> <p>Changed Committees names to Program Quality and Club Growth Committees.</p> <p>In several sections for committees, such as 3.4.7, additional words "but are not limited to:" were added under the appointments.</p> <p>Section 4.4.2, Division expenses in excess of \$500 must be authorized in writing only.</p> <p>4.6.2 - Lodging allowance for presenter changed to 50 miles from 100 miles.</p> <p>Removed the explanation of the proxies for International in Section 5.1, since all is on Toastmasters site updated by them.</p> <p>Section 2.1 – A new graphic done by Mark Lucas in OmniGraffle on Mac. The native files available on the District Website in both OmniGraffle and Visio.</p>	<p>C. Gardner</p> <p>M. Lucas</p>
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9/23/16	2.0	Minor unspecified changes	K.Baumgartner M. Bender C. Gardner M. Hulett M. Lucas D. Morales
2/2018	2.1	<p>Removed Fall Conference and Fall Speech Contests.</p> <p>Moved Youth Leadership Program from CGD to PQD.</p> <p>Added Pathways to responsibilities of Program Quality Director.</p> <p>Changed Committee Chairman/Chairmen to Committee Chair/Chairs.</p> <p>Changed “generally accepted accounting practices” to guidelines of Finance Department of TI and Audit Committee Guidelines document.</p> <p>Added TLI (Toastmasters Leadership Institute) to LACE (Leadership And Communication Experience) Training.</p> <p>Replaced “World Headquarters” with Toastmasters International.</p> <p>Section 2.2 District Officers, combined 2.2.1 and 2.2.2 Area Directors. Removed 2.2.3 District Logistics Manager. This was to align the definition of District Officers to District Administrative Bylaws.</p> <p>Section 3.2 District Leadership Committee, changed from District Nominating Committee.</p> <p>Section 3.7 Administration Policies &amp; Procedures Committee, the APP and District</p>	D. Cossack D. Dee C. Gregory D. Hosmer P. Kao K. Spears F. Stein M. Swider

		<p>Operation Manual did not require approval by DELP, just reviewed by DELP.</p> <p>Section 3.7.3 Membership, replaced current District Officers with Past District Officers.</p> <p>Section 3.8.1 Newsletter, removed the publishing months.</p> <p>Removed Division Funds and Division Bank Accounts from all sections. Section 4.4 District Bank Accounts, add “Concur” as the software for expenses reimbursement approval process.</p> <p>Section 4.7.2 Mileage Allowances. They are allowed if included in budget approved by District Council. Mileage and amounts are at the discretion of District Director.</p>	
3/2020	2.2	<p>Rebranded the document with TI logo.</p> <p>Clarified District Boundary in 1.1</p> <p>Section 1.4</p> <p>Updated revision dates of TI documents</p> <p>Section 2.1, modified org chart</p> <p>a) Moved Youth Leadership back to GCD</p> <p>b) Added Pathways Education Team to PQD</p> <p>c) Added social media, FDTV, eNewsletter and communication to PRM</p> <p>d) Changed Nominating to District Leadership Committee</p> <p>Section 3.8 added Social Media and Brand Compliance and made the Founder an eNewsletter, to be created semi-annually</p> <p>Section 3.9.3 Added the Public Relations Manager, Alignment and Data Chairs</p>	<p>L. Shapiro</p> <p>K. Hughes</p> <p>S. Richards</p> <p>F. Stein</p> <p>D. Dee</p>



		<p>Section 4.3.3 C, added requirement for Concur approvals for use of the District Reserve credit card.</p> <p>Section 4.4 c, added pre-approval email requirement for use of the bank debit card.</p> <p>Section 4.7.4, added keynote speaker travel allowance policy.</p> <p>Moved Revision History to Appendix A.</p> <p>Updated Appendix D per changed Protocol 9.0.</p> <p>Added Pathways Education Levels to Appendix E.</p>	
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## **APPENDIX B PRE-CONFERENCE PLANNING**

- I. **Authority** - District Administrative Bylaws, Article X. District Leadership Handbook, Catalog No. 222.
- II. **Purpose** - Schedule conference to enable the District to:
  - A. Conduct its regular business
  - B. Conduct District officer elections
  - C. Address special agenda items
  - D. Provide educational sessions
  - E. Conduct speech contests.
- III. **Responsibilities and Procedures**
  - A. District Conference Chair and others involved in pre-planning shall observe effective time management as follows:
    1. Regular business agenda items at Fall District Council: one (1) hour for meeting, plus one half (1/2) hour for possible overtime.
    2. Regular business agenda items at Spring Annual District Council: one and one half (1 1/2) hours for meeting, plus one half (1/2) hour for possible overtime.
    3. Special agenda items at any District Council require additional time.
    4. Agenda should be handled electronically whenever is possible.
  - B. Chair shall communicate to the hotel/site management, in writing, the total estimated time for any District Council Meeting.
  - C. Chair shall request, in writing, the hotel/site provide space available, uninterrupted, for the full length of the business meeting.
  - D. In the event of a time conflict, scheduling priorities shall be:
    1. District Council business meeting.
    2. District officer elections.
    3. International Speech Contest.
    4. Educational sessions.
    5. Fellowship and recognition.
    6. Other speech contests.

## **APPENDIX C BUSINESS MEETING GROUND RULES**

- I. **Authority** - Robert's Rules Of Order, Newly Revised, (current edition) shall be the governing document, in accordance with District Administrative Bylaws.
- II. **Voting Delegates** - are members of the District Council, which consists of the District Executive Committee and President (or proxy holder) and Vice-President Education (or proxy holder) of each District Club.  
The District Executive Committee consists of: District Director, Program Quality Director, Club Growth Director, Public Relations Manager, District Administration Manager, District Finance Manager, Area Directors, Division Directors, and Immediate Past District Director.
- III. **Resolutions or Motions** –
  - A. General Order of Business  
Resolutions, or motions over 12 words, excluding "I move", or a single motion combining two or more subjects, shall be submitted in writing to the District Administration Manager immediately after stating the motion or resolution.
  - B. New Business  
New Business may be presented by voting delegates only. All resolutions, motions, or announcements shall be submitted, in writing, to the District Administration Manager by the conclusion of the Minutes Approval Committee Report to be eligible for consideration under New Business.
  - C. Should a consent agenda be used for the Business meeting, Council members must be notified of the consent agenda at least five days in advance of the Business meeting, and it must be made available to them at least five days in advance of the Business meeting. Approved at the Council meeting November 2013.
- IV. **Recognition by the Chair** - Participants desiring to speak shall stand and:
  - A. Address the Chairman: "Mr./Madam District Director ";
  - B. Wait for acknowledgment by the Chairman;
  - C. State name, club number and status (voting delegate, non-voting delegate or non-voting member);
  - D. State business.

- V. **Discussion or Debate** - will not be permitted unless an appropriate Motion or Resolution is on the floor, outlining a specific subject.
- A. The Author (Maker) of the motion will be provided the first opportunity for discussion.
  - B. If a standing microphone is provided, anyone who speaks must use it, after being recognized by the Chairman.
  - C. Speaking time will not begin until a speaker has been recognized and begins to speak, from the standing microphone, if one is provided.
  - D. No person may speak longer than 1.5 minutes at one time, except by General Consent, or two thirds (2/3) vote of the delegates.
  - E. Chairman shall identify voting delegates with opposing views; then alternately recognize them.
  - F. No one is entitled to speak for a second time, until all others have had the opportunity to speak. No one may speak more than twice.
  - G. Debate on any main motion will be limited to ten (10) minutes, except by General Consent or two-thirds (2/3) vote of the voting delegates.
  - H. Time limits for debate on a motion apply only to the speaking times as defined above and such limits will not include debate, if allowed, by non-voting members.

## APPENDIX D ANNUAL ELECTION GROUND RULES

- I. **Committee Report** – The Chair or designee shall read the names of the members of the District Leadership Committee (DLC) and then shall read the names of the nominees of the DLC.
- II. **Nominations from the Floor** - Nominations from the floor may be made following the DLC report, one office at a time, starting with the District Director in descending order. Nominations from the floor may be made only (i) for candidates who have been interviewed by the DLC for that office, and who have declared at least one week prior to the election that they wish to be a floor candidate, or (ii) for offices that have been declared “invalid” in the DLC report.
  - A. Nominators must be members of the District Council.
  - B. Nominations shall be conducted as follows:
    1. Names and Club numbers of persons either placing a name in nomination or seconding a nominee shall be given to the District Director prior to the Business Meeting.
    2. Candidates being nominated from the floor must give prior consent to the nominator.
    3. The DLC Chair shall have guidelines of the necessary qualifications for each office for easy reference.
    4. The DLC Chair shall qualify the eligibility of any nominees from the floor. While the Nomination Committee Chair is making this verification, the business meeting will continue.
    5. Procedure:
      - a) Address the Chairman: "Mr./Madame District Director";
      - b) Wait for acknowledgment by the Chairman;
      - c) State your name and Club number;
      - d) State: "I place in nomination, for the office of \_\_\_\_\_, the name of \_\_\_\_\_."
- III. **Uncontested Offices** - When there is only one candidate for an office, the District Director may close the nominations, ask the District Administration Manager to cast a single ballot and declare the candidate elected.

**IV. Nominating Speeches**

- A. Each officer candidate is entitled to a maximum of two (2) minute nominating speech.
- B. Nominating speeches shall be delivered in alphabetical order of the candidates' surnames.
- C. Speeches shall be delivered from the platform and shall be given by the candidate, if present. If the candidate is not in attendance, the speech may be given by the candidate's representative.

**V. Voting - Immediately following the conclusion of the speeches for each office, a secret ballot will be taken.**

- A. Ballots shall be picked up by the District Logistics Manager, and assistants.
- B. Ballots shall be tabulated and the results reported to the District Council.
- C. If more than two (2) candidates are running for an office, and none receives a majority of votes cast on the first ballot, then the candidate who received the least number of votes and any candidate receiving less than 10% of the votes cast shall be dropped from the ballot. A new ballot shall be taken and the procedure shall be repeated until a candidate receives a majority of the votes cast.
- D. If two (2) candidates are on the ballot, and neither receives a majority of the votes cast due to invalid votes, a new ballot shall be taken and the procedure shall be repeated until one candidate receives a majority of the votes cast.

## **APPENDIX E GLOSSARY OF ABBREVIATIONS**

### **LEGACY EDUCATION LEVELS**

ACB – Advanced Communicator Bronze  
ACS – Advanced Communicator Silver  
ACG – Advanced Communicator Gold  
ALB – Advanced Leader Bronze  
ALS – Advanced Leader Silver  
ALG- Advanced Leader Gold  
AM – Administrative Manager  
APP – Administrative Policy and Procedures  
ATM – Able Toastmaster  
ATMB – Advanced Toastmaster Bronze  
ATMS – Advanced Toastmaster Silver  
ATMG – Advanced Toastmaster Gold  
CC – Competent Communicator  
CL – Competent Leader  
CTM – Competent Toastmaster

### **PATHWAYS EDUCATION LEVELS**

DL1-5 - Dynamic Leadership Level 1-5  
EC1-5 - Effective Coaching Level 1- 5  
EH1-5 - Engaging Humor Level 1-5  
IP1-5 - Innovative Planning Level 1-5  
LD1-5 - Leadership Development Level 1-5

MS1-5 - Motivational Strategies Level 1-5  
PI1-5 - Persuasive Influence Level 1-5  
PM1-5 - Presentation Mastery Level 1-5  
SR1-5 - Strategic Relationships Level 1-5  
TC1-5 - Team Collaboration Level 1-5  
VC1-5 - Visionary Communication Level 1-5

### **LEADERSHIP TITLES**

CGD – Club Growth Director  
DEC – District Executive Committee  
DELP – District Elected Leaders and PRM  
DD – District Director  
DLC – District Leadership Committee  
DTM – Distinguished Toastmaster  
FM – Finance Manager  
ID – International Director  
IP – International President  
IPDD - Immediate Past District Director  
IPID - Immediate Past International Director  
IPRA - Immediate Past Region Advisor  
LM – Logistics Manager  
PDD – Past District Director  
PDG – Past District Governor  
PID – Past International Director



PIP – Past International President

PQD – Program Quality Director

PRM – Public Relations Manager

RA – Region Advisor

TI – Toastmasters International