

# Region Advisor Handbook







**Thank you to the following  
Region Advisors for assisting  
with the updated version of  
this handbook.**

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**TOASTMASTERS INTERNATIONAL**  
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# Missions, Values, and Promises

## **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 Core Values**

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

## **Toastmasters International Brand Promise**

Empowering individuals through personal and professional development.

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

# The Role of the Region Advisor

The Region Advisor's role is to support District leaders in fulfilling the District mission to build new clubs and support all clubs in achieving excellence. Every Toastmasters International region is appointed one Region Advisor for regions with eight or fewer Districts and two Region Advisors for regions with nine or more Districts. The Board of Directors may approve the appointment of an additional Region Advisor for any region in order to meet region-specific needs and further the interests of Toastmasters International.

To support your Districts effectively, you must first understand your role within the Toastmasters organization. Having a clear understanding of your role and responsibilities is essential to your success, and ultimately the success of the Districts in your region.

While you may want to assist by taking on some of the District leaders' work, this isn't part of your responsibilities. The expected outcome for each Region Advisor, regardless of region or District, is to support District leaders in achieving the District mission and achieving goals toward the District Recognition Program.

## Term of Office

Region Advisors report to the International President through World Headquarters and serve a 15-month term, beginning April 1 and concluding June 30 of the following year. A Region Advisor may serve no more than two consecutive terms and must apply for each term. There is no limit on serving nonconsecutive terms. Region Advisors may not campaign for, be elected to, or be appointed to any District office or role while serving as Region Advisor.

**Policy and Protocol →**

**Policy 10.0: Region Advisors, Section 3: Term of Service.**

## Responsibilities

No two District leaders are alike, and the needs of each District leadership team can be as different as the individuals who fill the roles. This creates challenge and opportunity for Region Advisors. You have the unique opportunity to make a significant impact on the individuals you support and ultimately the success of the Districts you support. Your challenge is to assess the type of assistance and support each leader needs, and provide it. As a Region Advisor it is anticipated that you would spend approximately 50 hours a month in your role. However, actual engagement will be dependent on the District.

In the beginning of the Region Advisor term, each Region Advisor is expected to complete a comprehensive Region Success Plan. This will be a candid and in-depth assessment of each District supported by the Region Advisor, to ensure better planning and support.

## District Success Planning

- ▶ Assess each leader's ability to achieve the District mission.
- ▶ Develop a plan for supporting the District leaders that will lead them to achieve the District mission.
- ▶ Mentor District leaders in creating their District Success Plans to achieve the District mission.
- ▶ Collaborate with District leaders in assessing their marketing systems and developing successful marketing strategies.
- ▶ Work with the Club Growth Directors to build successful marketing teams to retain and grow members and clubs.
- ▶ Coach District Public Relations Managers to develop effective communication plans that align with the District's marketing strategies and objectives.

## Communication and Facilitation

- ▶ Use effective verbal and written communication skills to organize and lead monthly meetings with District leaders to share best practices, provide support and encouragement, and focus District leaders on achievement of the Club and District missions.
- ▶ Invite the International Director to attend at least one meeting with District leaders per quarter.
- ▶ Participate fully in all District Leader Train-the-Trainer webinar sessions for any training to be facilitated by Region Advisors.
- ▶ Facilitate and train District leaders, as assigned, at August District Leader Training and Mid-year Training. Build credibility through preparation and planning.
- ▶ Visit Districts approved by the International President to teach corporate visit skills, mission-focused skills, and marketing techniques.
- ▶ Assist District leaders in resolving conflicts when necessary or appropriate.

## Social Media

- ▶ Participation in social media must be in accordance with the Region Advisor Social Media Participation Chart and Region Advisor Social Media Best Practices document. See Resources section on **page 26**.

- ▶ Review **Protocol 4.0: Intellectual Property** regarding websites and social media for additional information.

## Leadership Development

- ▶ Model exceptional leadership skills and maintain a professional demeanor at all times.
- ▶ Mentor District leaders in leadership recruitment, leadership development, succession planning, and motivating strategies to achieve success.
- ▶ Identify and encourage talented, qualified members to apply for the Region Advisor role and/or International Director role.

## Partnerships

- ▶ Establish trusting relationships with District leaders through frequent and consistent communication.
- ▶ Support District leaders in working together as they are elected to fulfill the District mission.
- ▶ Serve as a vital link between Districts and World Headquarters.
  - Share organizational developments and impact on Districts.
  - Provide feedback to World Headquarters to improve the Region Advisor Program.
- ▶ Establish and maintain a mutually beneficial relationship with your region's International Director.
- ▶ Participate in monthly Region Advisor calls to share best practices and effective tools.

## Reporting

- ▶ Complete all reports in a timely manner. This includes:
  - Region Advisor Monthly Report (due on the 5th of each month), including the progress of the Districts in achieving their goals.
  - District Visit and Corporate Visit Reports (due within 30 days after the visits).
  - Expense Reimbursements (due within 30 days after incurring the expense).



## Competencies

Successful Region Advisors possess a range of competencies, such as:

- ▶ Brand familiarity
- ▶ Coaching
- ▶ Confidentiality
- ▶ Conflict resolution
- ▶ Critical thinking
- ▶ Diplomacy
- ▶ Emotional intelligence
- ▶ Facilitation abilities
- ▶ Lead identification and sourcing
- ▶ Mentoring
- ▶ Organizational skills
- ▶ Persistence
- ▶ Prioritization
- ▶ Relationship building
- ▶ Team building
- ▶ Time management

### Resources

District Administrative Bylaws

*District Recognition Program* (Item 1490)

Policy 10.0: Region Advisors

Protocol 10.0: Region Advisors Expenses

Protocol 10.1: Region Advisor Visits

Region Advisor Tutorials

### Need Help?

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

# Onboarding and Transition

What an exciting time! For the first three months of your term, you will prepare for the program year ahead. During this time you will work closely with your predecessor, who will mentor and train you and provide guidance on your new role. Be familiar with **Policy 10.0: Region Advisors**, **Protocol 10.0: Region Advisors Expenses**, and **Protocol 10.1: Region Advisor Visits**.

## Region Advisor Welcome and Orientation Call

In March, the onboarding process begins with a welcome and orientation conference call with all newly appointed Region Advisors, the International President, International President-Elect, First Vice President, and World Headquarters staff.

## Region Advisor Transition Call with World Headquarters

In April, the newly appointed Region Advisors, their predecessors, and World Headquarters staff attend a transition call. The purpose of this call is to discuss transition training expectations. Your predecessors will share their experiences and provide suggestions to help you succeed in your new role.

## Additional Calls

During the transition period of April-June, newly appointed Region Advisors will also participate in monthly peer calls, as well as transition webinars designed to help them succeed in their role. The outgoing Region Advisors will form transition committees, selecting topics that will be beneficial in training the incoming Region Advisors.

## Microsoft Teams Communication

Toastmasters International communicates with Region Advisors through a centralized communication platform called Microsoft Teams. You will receive instructions from the Region Advisor Program Coordinator on how to use this tool; however, here are a few of the best practices while using the platform:

- ▶ Use Microsoft Teams to post helpful tips or other information that will be useful to the respective community.

- ▶ Each time you post a message, all community members, including World Headquarters staff, will receive an email notification.
- ▶ Keep your messages concise, and please limit “thank you”-type messages.
- ▶ When possible, post your message in a specific discussion thread rather than creating new threads each time. For example, if World Headquarters creates a thread named Region Advisor Monthly Calls, all comments pertaining to this topic should be posted within this thread. This ensures we capture the conversation in one place.
- ▶ World Headquarters will communicate organizational updates through Microsoft Teams.



## Training with Your Predecessor

Much of your training during the April–June transition period will be with your predecessor. Building a strong relationship and having open communication will be key to understanding the District’s dynamics, history, and needs. You’ll also have the opportunity to observe how your predecessor manages their monthly District leader conference calls.

During the transition period, your predecessor is the primary Region Advisor contact for all District leaders in the region. However, during this time, they will support your efforts to build relationships with these leaders and establish yourself as a trusted advisor. Hold regular one-on-one calls with your predecessor to identify any areas of concern in each District and to seek your predecessor’s advice. Please be mindful of allowing your predecessor to support and serve the current District leadership teams through June 30. Work closely with your predecessor to determine the best time to begin supporting the newly elected officers in preparation for their term starting July 1.

After the transition call with World Headquarters, connect with your predecessor for an overview of the following:

- ▶ Challenges, successes, and best practices for each District in your region.
- ▶ Review the District’s Success Plan together. The intention is for your predecessor to help you understand each District’s approach and desired goals. Keep in mind that the next leadership team may approach the District Success Plan differently, but this task will give you useful history to help the next team.
- ▶ Additional marketing suggestions and areas for enhancement as appropriate.
- ▶ How to prepare for your role.
- ▶ Training responsibilities at August District Leader and Mid-year Training.
- ▶ Review the District visit process in preparation for the visit.
- ▶ Review the District Visit Reports available through Microsoft Teams.
  - Discuss the District Visit Reports with your predecessor and International Director for clarification or updates.
- ▶ Discuss with predecessor how to introduce you to the District teams and how to encourage incoming District Directors to invite you to a District visit.
- ▶ Monthly conference calls with District leaders.
- ▶ Any other reports/resources that might be helpful. This includes:
  - Region Advisor Monthly Report (due on the 5th of each month), to assess and report on each District’s progress.
  - District Visit and Corporate Visit reports (due within 30 days after the visit).
  - Expense Reimbursements (due within 30 days after incurring the expense).

## Training Provided by World Headquarters

In addition to training with your predecessors, World Headquarters will provide training on topics based on the suggestions and feedback of Past Region Advisors. These trainings are intended to take place during the April–June transition period.

# Key Relationships

In your role, you will work closely with your fellow Region Advisors, your region's International Director, District leaders in your region, and World Headquarters.

## Fellow Region Advisors

Collaboration with your fellow Region Advisors will be one of the most enriching experiences of your term. Focus on building these relationships, especially during August District Leader Training and the International Convention. Each month, all Region Advisors participate in a conference call to share best practices, discuss specific issues, and support one another. Make every effort to join and participate on these calls. If you cannot attend, make sure to inform World Headquarters well in advance.

Regions consisting of nine or more Districts are appointed two Region Advisors. Regions with only one Region Advisor may benefit from working together to share best practices and ideas.

## International President

As a Region Advisor, you report directly to the International President. Region Advisors create a partnership with the International President to provide more effective guidance to the District leaders. The International President reviews and approves District visit requests and participates on the Region Advisor Monthly Calls.

## International Directors

International Directors are officers of the corporation and have strategic and fiduciary responsibilities. The collaborative relationship you build with the International Director of your region will strengthen your efforts to provide the best possible support to your Districts.

International Directors are an excellent source of advice and guidance for District leaders and Region Advisors. Partner with them at August District Leader Training, the International Convention, and Mid-year Training, and on District leader conference calls. You can learn

about Toastmasters International's strategic direction and plans for growth from the International Director.

Call your International Director to introduce yourself and ask to discuss the status of the Districts from the International Director's perspective, and offer a standing invitation for them to join the scheduled monthly District leadership and peer group calls at least once per quarter. It is up to the individual International Director whether to participate, but they must be invited at least once per quarter. If you can confirm participation, set aside a few minutes during each conference call for the International Director to comment on the discussion topics, and provide an open forum for the District leaders to ask questions. Plan to have monthly one-on-one calls or as needed with the International Director to discuss District progress and achievement.

## District Leaders

You will fulfill a number of duties when interacting with District Directors, Program Quality Directors, Club Growth Directors, and District Public Relations Managers. As Region Advisor you will support the District Directors, Program Quality Directors, Club Growth Directors, and District Public Relations Managers in their respective roles, their development as a leader, and in working collaborate and collectively toward the District mission. Remember to serve as a supportive and encouraging mentor, rather than directing or dictating what must be done. As a Region Advisor, you will share best practices with these leaders to help them overcome challenges.

## District Director

By working with you, the District Director can benefit from your experience. You can assist them with the District Success Plan, conflict resolution, and goal-setting.

## District Success Plan Support

Successful Districts take the time to plan and direct volunteer efforts and resources appropriately. For maximum effectiveness in helping Districts reach their goals, offer to assist the District Director, Program Quality Director, and Club Growth Director with the development of the District Success Plan. Be sure to review the District Success Plan thoroughly before each District visit, August District Leader Training, and Mid-year Training. The District Success Plan should be reviewed and changed when necessary to meet the goals of the District to become Distinguished. In assisting the District with developing their District Success Plan, you may reference the *District Strategies Guide* (Item 431).

## Goal-setting

Focus on the District mission, which embodies the goals of the District Recognition Program. Any additional goals set by the District Director should be in alignment with the District mission and the District Success Plan, and supplement the District Recognition Program goals.

For marketing-related budget assistance, guide the District leaders to District Finance, at [Districtfinancialquestions@toastmasters.org](mailto:Districtfinancialquestions@toastmasters.org), and the financial tools available on the [Toastmasters website](#).

## Program Quality Director

The Program Quality Director is responsible for all aspects of education and training within the District. This includes supporting quality club programming efforts, conducting or organizing speech contests, promoting the Distinguished Club Program, retention of club members, and planning and executing the District conference.

As the Region Advisor, you help the Program Quality Director to remember key deadlines and understand their role.

## Club Quality

A quality club environment is the single most important factor in membership retention. Vibrant

clubs exceeding members' expectations will enhance membership and members' satisfaction.

The Program Quality Director should encourage District leaders to have Area Directors present *Moments of Truth* (Item 290) in a motivating and engaging manner to their clubs when they visit twice a year. Avoid presenting the same session twice by tailoring the second presentation.

## Club Growth Director

As the District leader who is responsible for all aspects of club growth and retention and individual membership growth, the Club Growth Director will benefit from your marketing expertise. The Club Growth Director is responsible for the development of an overall marketing plan necessary for building new Member Clubs; the increase in individual membership and retaining clubs in the District; the recruitment and training of District marketing teams; and the formulation of specific membership building recognition programs. Support the Club Growth Director in developing a District marketing plan in conjunction with District team members, keeping in mind that every District is different and not all Districts have a club-building team. Review the state of the District with the leadership team to agree on marketing strategies.

## Club Growth Director Handbook

The tools and resources in the *Club Growth Director Handbook* (Item 110) will help you understand the role of the Club Growth Director. Please read and encourage the Club Growth Directors to read and refer to this guide often through the program year.

## Corporate Visits

For important information on corporate visits, please see [page 15](#).

## Retention

One of your responsibilities as a Region Advisor is to encourage District leaders to recognize that membership and club retention are just as important as club growth.



If retention is a challenge for any of your Districts, work together with the Program Quality Director, Club Growth Director, and their teams to identify possible strategies to increase retention. Evaluate the District's specific challenges and adapt your suggestions accordingly. Be prepared to discuss practical approaches and personal experiences.

Encourage District leadership to focus on the importance of club values and retention at Club Officer Training (COT). If the Districts ask, you may give education sessions at COTs. However, it's best to teach District leaders how to present education sessions early in the year so they can continue developing their skills.

### **Club Coaches, Sponsors, and Mentors**

As a Region Advisor, you can help the Club Growth Director to develop a plan for building and maintaining strong club sponsor, mentor, and coach programs. The first step is to make sure they understand the structure, requirements, and practices of these programs. Become familiar with the District's current plan, suggest improvements based on your past experience, and make this a topic of discussion during one of your monthly District leader calls. Invite a subject matter expert to participate in the call and encourage discussion about challenges and successes.

It's also important to suggest that the District leaders acknowledge and reward club coaches, sponsors, and mentors. This will encourage them to provide outstanding initial training and ongoing support. It may also inspire other leaders to take on these roles in the future.

### **Support for the District Recognition Program**

As a Region Advisor, you play an integral role in assisting Districts achieve Distinguished recognition.

The *Distinguished Club Program and Club Success Plan* (Item 1111) serves as the foundation of the *District Recognition Program* (Item 1490). By focusing on club quality and member satisfaction, the District Recognition Program (which encompasses the Distinguished Area, Division, and District programs)

maximizes leadership opportunities, and provides tools to help District leaders be successful.

When you focus on helping the Districts fulfill the District mission, achieving Distinguished recognition is very achievable. Promote the effectiveness of assigning trained club coaches to struggling clubs and introducing reward and recognition programs for clubs. For example, encourage the District leaders to recognize clubs that have achieved at least five goals of the Distinguished Club Program and met the membership requirement by December.

### **District Public Relations Manager**

The District Public Relations Manager is responsible for coordinating publicity efforts in the District. They publicize District news and events, create media opportunities and maintain communication between the District, its members, and the public.

Work with each District Public Relations Manager as you do with the District Director, Program Quality Director, and Club Growth Director. You can help the District Public Relations Manager by:

- ▶ Hosting a call early in the year with your District Public Relations Managers and Club Growth Directors to review roles and determine how they can best work together.
- ▶ Hosting monthly calls with the District Public Relations Managers to share best practices.

Direct the District Public Relations Managers to the Toastmasters International *public relations webpage* in the Leadership Central section of the Toastmasters website, where they'll find videos, webinars, and other resources. District Public Relations Managers can direct any questions they might have about their role to [pr@toastmasters.org](mailto:pr@toastmasters.org).

## Conflict Resolution

You may be asked to support the District in conflict resolution. It is best to identify the severity of the situation and decide if you can assist or if the District Growth and Support Team at World Headquarters should step in to facilitate.

You can determine the extent of your involvement based on your level of expertise in the area of conflict resolution and your ability to remain objective. You aren't expected to solve the District's problems yourself. As the facilitator, your goal is to help the individuals resolve the conflict while you remain neutral and preserve your relationships with all District leaders.

If the conflict has the potential to negatively impact the District, you or District leaders can communicate with the District Growth and Support Team or email [districts@toastmasters.org](mailto:districts@toastmasters.org) for assistance, and copy [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org).

When addressing conflicts, remember to consider the impact of the conflict on the District's future and be aware of the following principles:

- ▶ Conflict is a common occurrence when working in teams and can be healthy.
- ▶ Healthy conflict is passionate, unfiltered debate around issues of importance to the team.
- ▶ Managing conflict is an important and necessary leadership skill.
- ▶ As Toastmasters, we all share the same core values: integrity, respect, service, and excellence. You can demonstrate these core values by managing conflict well.
- ▶ Assertiveness is the ability to be self-assured and confident without being aggressive. It is an important skill when dealing with conflict.
- ▶ Use a conflict resolution model such as *Describe, Explain, Share and Compromise (DESC)* to remain assertive.
  - Describe the problem using "I" statements rather than "you" statements.
  - Express how you think and feel.
  - Specify the behavior you believe should replace the bothersome behavior.

- Explain the positive consequences of changing the behavior.
- ▶ Use the following four strategies to resolve conflicts:
  - **Separate the people from the problem.** Keep communication focused on the tasks and discourage personal attacks.
  - **Separate interests from positions.** Positions are concrete things you want when negotiating, while interests are the reason why you want them. Negotiate for interests rather than arguing for positions.
  - **Generate options.** Brainstorm and remain open-minded to find solutions to the problem.
  - **Establish objective criteria.** Evaluate solutions using criteria to allow the conflict to focus on the specific issue, rather than personality differences.

Mentoring and listening skills are necessary. Conflict resolution is an art, but it can be learned. Review the ***Communication and Conflict*** (Item 615C) resources on the Toastmasters website, to help guide the District leaders.

## World Headquarters

You will receive communication and support from World Headquarters. The Region Advisor Program Coordinator is your primary contact and supports you in your role by:

- ▶ Coordinating communication from World Headquarters in Microsoft Teams regarding organizational updates.
- ▶ Providing guidance for setting up communication platforms such as Zoom Video Communications.
- ▶ Processing expense report reimbursements.
- ▶ Managing the Region Advisor Monthly Reports.
- ▶ Communicating approval status of all District visit requests and processing of District Visit and Corporate Visit reports, once submitted.

If you have questions or need assistance with anything related to the Region Advisor role, please contact the Region Advisor Program Coordinator at [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org).

## Resources

*District Leadership Handbook* (Item 222)

*District Strategies Guide* (Item 431)

*Club Growth Director Handbook* (Item 110)

Club Sponsor, Mentor and Coach Training Materials

*District Recognition Program* (Item 1490)

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

Public Relations Resources

District Finance

*Communication and Conflict* (Item 651C)

District Success Plan

Policy and Protocol 3.0: Ethics and Conduct

*Policy Violations Quick Reference Guide* (Item 471)

# Conference Calls

## Monthly Region Advisor Conference Calls

Each month Region Advisors organize and participate in a conference call to share best practices, clarify information, and collaborate on current initiatives. The Region Advisors rotate moderator and scribe responsibilities each month. The Region Advisor Program Coordinator may be on the call to provide updates from World Headquarters. Make every effort to join these calls as the information you receive from your peers will make you a more valuable resource to the District leaders.

## Monthly District Leader Conference Calls

The purpose of these calls is for District leaders to share best practices, marketing ideas, challenges, solutions, and successes. You are required to invite your International Director to be a part of the District leadership monthly team peer group calls at least once per quarter. The methods of communication you use will vary, but the most frequently used modes of communication include email, telephone, Zoom, Facebook, and WhatsApp. The most effective practice is to hold consistent monthly conference calls.

World Headquarters will provide a list of suggested discussion topics, available in Microsoft Teams, for you to refer to each month on your District leader calls. A conference call account, on a platform determined by World Headquarters, will be assigned to you at the start of your term for all of your District leader calls. Instructions on how to use this service will be provided by the Region Advisor Program Coordinator. Once all conference call dates are finalized, please provide this information to the Region Advisor Program Coordinator at [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org) for the master calendar.

During the latter part of the year, utilize your conference calls and online meetings to increase focus on teaching District leaders how to train their officers and further support the District Recognition Program efforts.

## Making Initial Contact with New District Leaders

You will receive contact information for the newly elected District leaders as received from World Headquarters. Before contacting the leaders, best practice is to understand the difference between each leader role, review past District Success Plans, and be familiar with the Districts' past performance by reviewing the Distinguished Performance Reports and the Historical Distinguished District Performance Report, provided to you by the Region Advisor Program Coordinator. Your predecessor is encouraged to provide you with region-specific methods of communication that they have used during their term.

You can send an email or call each District leader individually. Please contact the District Director first as a courtesy. This is an opportunity for you to build rapport and add value to the Districts in need of your support.

Your objectives in the communication are to:

- ▶ Introduce yourself as the incoming Region Advisor.
- ▶ Congratulate the newly elected District leader.
- ▶ Provide a few specific examples of how you can assist with their efforts to fulfill the District mission.
- ▶ Request a conference call with the incoming team before August District Leader Training to get acquainted; and/or
- ▶ Request to schedule a 15-minute meeting with new District leaders at August District Leader Training or during the International Convention. The objective is to build rapport by meeting face-to-face and to understand the successes and challenges the Districts face.

June is a busy month and can be stressful for all leaders. If they need your immediate assistance, begin by asking these individuals to focus on the District Success Plan and District budget. Ensure that they are familiar with the requirements for submitting various reports. As the incoming Club Growth Director will not be on the current District leadership team, work closely with them to come up to speed and transition with the outgoing Club Growth Director, including:

- ▶ Building an understanding of the current District's standing.
- ▶ Reviewing of the current District Marketing Plan.
- ▶ Beginning revisions of the District Marketing Plan for the upcoming year.

### **Planning Monthly District Leader Conference Calls**

Plan to communicate with your District leaders at least once a month to create an environment of teamwork and support. Schedule the conference calls in advance for the year so that District leaders can plan to attend regularly. You may also want to create a document that includes the dates, times, and meeting information so that it can be shared with District leaders. Another option is to send a meeting invite to the District leaders with the meeting information.

The frequency may vary and will depend on your and the District leaders' availability. Calls may be held in a variety of ways, including:

- ▶ With one individual District team at a time (including the District Director, Program Quality Director, Club Growth Director, District Public Relations Manager, and other District leaders as needed).
- ▶ Peer group calls with all individuals holding the same role, such as all District Directors, Program Quality Directors, Club Growth Directors, and District Public Relations Managers of the region.
- ▶ One-on-one calls initiated by you or a District leader upon request.
- ▶ Weekly Region Advisor open office hours (no appointment needed).

District leader conference calls are a tool to refocus leaders on their mission. The focus of the first quarter is on setting up the solid foundation. Second quarter, focus on strengthening the momentum of the Toastmasters program for members. Third quarter, focus on leadership development at all levels. The fourth quarter should be focused on finishing strong and leaving a District in great shape as per the District Recognition Program.

When communicating with District leaders, keep an open mind because many Districts do not operate the same as you might be accustomed to. It may be helpful to listen and ask more questions rather than immediately directing the conversation. In doing so, you may learn something that will help you better guide and support the leaders. Ask District leaders to provide suggestions to their peers to solve specific concerns and to share best practices. When creating your schedule of calls, survey peer groups to find the time the majority of participants can attend.

### **Hosting Your First Monthly District Leader Call**

When you host your first call, use this time to make introductions, explain the purpose of the calls, and set expectations, including the commitment to end the call on time. Generate excitement and clearly communicate how each leader will benefit by joining calls on a regular basis.

The District Success Plan and budget are often covered at August District Leader Training. It's best for District leaders to have started work on these documents before trainings. Raise this subject during District conference calls so best practices can be shared among Districts and you can address any questions that may come up. Have another Region Advisor or Past Region Advisor attend your first calls as a silent observer to give you feedback on both facilitation and discussion. Work with a Past Region Advisor as a mentor. A list of Past Region Advisors who are available to mentor current Region Advisors will be made available by World Headquarters.



Once your District leader conference call dates are scheduled, be sure to submit all dates to the Region Advisor Program Coordinator at [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org) for the master calendar.

### **District Assessment Guideline**

The District Assessment Guideline is an opportunity to ascertain the District's needs so you can provide proper guidance and support. This information will help you better understand District successes and challenges, and identify strategies to achieve the District mission. World Headquarters will provide you with this tool to be used during your first monthly District leader calls.

### **Region Advisor Monthly Report**

The Region Advisor Monthly Report is a monthly reporting system through which Region Advisors will evaluate District leadership teams' success metrics, processes, and District performance progress. The information will be provided directly to the International President on a monthly basis. The link to the report can be found in Microsoft Teams and is due on the fifth of each month reporting on the month prior.

# Region Advisor District Visits

Region Advisors visit Districts to provide support, leadership development, skill building, mentoring, and coaching to expand District leaders' capacity to achieve the District mission. During visits, Region Advisors help District leaders by teaching skills and focusing on goal planning. These visits generally occur from July–October, during Club Officer Training, District trainings, or District Executive Committee meetings. For additional information, please see **Protocol 10.1: Region Advisor Visits**.

Region Advisors visit Districts as approved by the International President. Districts must accept visits by a Region Advisor. No travel or online arrangements can be made without prior approval. Once approved, you should make arrangements at least 21 days in advance of the visit date to get the best rates. For online visits, requests must be submitted 14 days in advance for consideration.

Work with District leaders and your predecessor to identify the need for each District visit. Be sure to review the District Success Plan before you speak with the District leaders. This will show that you are aware of last year's plan and are available to help them achieve this year's goals.

## International Officer and Director Visits

International Officers and Directors conduct District visits as ambassadors promoting the Toastmasters organization. They assist 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.

## Region Advisor Corporate Visits

Region Advisors support Districts in club-building visits from July–October. These visits are limited after Mid-year Training, as the International Officers and Directors will visit corporations during the latter part of the program year.

Ensure that the Club Growth Director or club-building team schedules three or more club-building events, such as appointments, summits, and/or open houses, to coincide with your visit. This includes corporations, universities, government agencies, associations, nonprofit organizations, and communities. Please note that these types of appointments may also be conducted online via Zoom, Skype, Microsoft Teams, etc. Work with the team in advance to ensure they are confident with the cycle of successfully identifying leads, conducting cold calls and visits (online or in person), and chartering and maintaining strong relationships with local corporations and groups. This is where you, as the Region Advisor, play a critical role in helping the District schedule your visit for maximum benefit.

The Club Growth Director or club-building team is responsible for leading club-building visits. Ensure that the District Director, Club Growth Director, and club building team are communicating with each other in coordinating corporate visits. The Region Advisor will provide performance feedback and evaluation. This will empower the District leaders to confidently continue club-building efforts long after the Region Advisor has gone home.

## Travel

Toastmasters International reimburses Region Advisors for travel expenses to August District Leader Training, Mid-year Training, and approved District visits. As a Region Advisor, it is important for you to know **Protocol 10.0: Region Advisors Expenses**. You will be reimbursed for the following:

- ▶ Lowest-rate round-trip airfare and up to \$50 USD per segment to secure a seat.
- ▶ Public transportation (coach or discount) or mileage at the current charitable standard mileage rate in effect for federal income tax purposes by the United States Internal Revenue Service (IRS) by the most direct route for the following individuals:
  - United States citizens residing in the United States; or
  - United States citizens residing outside of the United States who file a United States tax return; or
  - Non-United States citizens residing in the United States.
    - For non-United States citizens residing outside of the United States, reimbursement is at the standard business rate but not to exceed reimbursement rates as specified by local regulations.
    - Mileage reimbursements require documentation that includes the travel date, distance traveled, and travel purpose.
- ▶ Other public transportation, shuttle, taxi, or mileage driven to and from the RA's home and to and from the passenger terminal to the event, up to \$50 USD each segment.
- ▶ Hotel accommodations, including applicable taxes, for the number of nights required for attendance at training events. Incidental expenses and all additional nights' lodging are the responsibility of the RA.
- ▶ A per diem of \$30 USD for each day that event attendance is required.
- ▶ RAs submit an expense report through the electronic expense reporting system, accompanied by receipts, within 30 days of the transaction. Expenses are subject to the approval of the Chief Executive Officer.

When Region Advisors travel on Toastmasters International business, insurance coverage is provided. You are not required to purchase additional coverage. An explanation of policy information and coverage will be provided to you prior to your first District visit. Keep this document with you while traveling on Toastmasters International business.

### Resources

Distinguished Performance Reports

*District Recognition Program (Item 1490)*

District Visits

District Visit Brochure (Item 660)

International Officer, International Director, and Region Advisor Responsibilities (Item 661)

Protocol 10.0: Region Advisors Expenses

Protocol 10.1: Region Advisor Visits

# District Visit Process



## Prior to the Visit

1. Get familiar with the District by reviewing the District Success Plan, District performance reports, and past District Visit Reports.
2. Contact the District to suggest a visit between July and October. Be aware that many of these leaders may not fully understand the evolving role of the Region Advisor. This is an opportunity to explain the Region Advisor role and how District leaders will benefit from working with you. Engage in conversation to identify the District's needs or goals related to the District mission, then explain how you can help them meet those needs and goals. When you ask questions first, it allows you to tailor your responses to their specific needs. A good place to start is by offering to help the District leaders develop strategic plans to meet their goals.
3. Not all Districts may require a visit. Determine if a visit is necessary with your predecessor and the District leaders. If so, ensure they understand the District visit request process and that the District must accept a visit.

## District Visit Requests

World Headquarters will send you an official District visit request document. After identifying the District's needs, please complete the form and submit to [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org).

The International President will review all District visit schedules and will notify World Headquarters if your request was approved or not. If approved, World Headquarters will send a letter to the District leaders notifying them of the approved visit and will include the **District Visit Checklist** (Item 1476) to get the District started. No travel arrangements can be made without approval. Please make your travel arrangements upon approval and at least 21 days in advance of the visit date.

## Develop the Agenda

Utilize the District Visit Checklist to set the expectations and work with the District to prepare a full agenda. Schedule a telephone or video conference call with the leaders to discuss the details.

Make sure the agenda includes activities such as:

- ▶ Providing marketing support and expertise to expand the District's capacity to grow clubs and membership.
- ▶ Training and coaching the Club Growth Director and the club-building team, if the District has one, on how to:
  - Schedule and maximize club-building visits. Ensure that three or more club-building opportunities are scheduled in advance and that the appropriate District leaders and the primary contact for the corporation have committed to the visit.
  - Provide feedback to the Club Growth Director and/or the club-building team while they conduct cold and warm calls to charter new clubs.
  - Review the club-building cycle.
- ▶ Discussing the District Success Plan with the District leaders. Mentoring to optimize the District leaders' individual performance. One-on-one conversations can be helpful to provide support for any concerns the District leaders have and target specific objectives.
- ▶ Discussion about identifying future leaders and creating a District succession plan.
- ▶ Teaching the District leaders skills that will empower them to be self-reliant and strategic.
- ▶ Attending a District Executive Committee meeting or Club Officer Training, if possible.
- ▶ Schedule a debrief at the end of each visit and define who should be in attendance. Be sure to discuss next steps and determine responsibility for certain action items identified during the visit.

World Headquarters will contact the District 4–6 weeks before the visit to remind them to complete and submit the District Visit Checklist, and to notify them their Club Building Kits are being sent. Contact the District two weeks before the visit to confirm travel plans, agenda, and any last-minute changes.

## Club Building Kits

World Headquarters will send **Club Building Kits** to the Club Growth Director of each District approved for a visit. The kit contains Toastmasters education program materials as well as marketing and membership resources to be left behind on your club-building opportunities with the Club Growth Director. After reviewing the contents in the kit, determine which materials are appropriate depending on the organization's (community, government agency, etc.) understanding of the Toastmasters program. During the visit, you will explain how these resources and materials can be used for marketing purposes and to help guide the District to success. If a visit was not approved, please be sure to review the materials available on-line in a conference call setting with your District leadership team.

## During the Visit

Building relationships with District leaders is the key to your success during District visits. During the visit, the Region Advisor supports, coaches, and mentors the District leaders while encouraging and celebrating their successes.

- ▶ Teach skills rather than lead the effort.
- ▶ Respect confidentiality with integrity.
- ▶ Keep the District leaders on track based on the agreed-upon agenda, but be flexible if agenda items change.
- ▶ Inspire and encourage.
- ▶ Give honest feedback in a positive manner.
- ▶ *Presenting Corporate Recognition Awards are limited to International Officers and Directors.*

## After the Visit

- ▶ Convey your appreciation for the District leaders' time. Best practice is to send an email or mail a "thank you" note to each District leader who helped create a successful visit.
- ▶ Respond to any remaining queries.
- ▶ World Headquarters will send a Post-District Visit Assessment to the District leadership team within 72 hours after the visit. A blank assessment will also be provided to the Region Advisor in advance.



- ▶ Within 30 days after a District visit, submit the following to World Headquarters at [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org):
- ▶ **District Visit Report:** You can complete this report with the District leaders during the debrief or by yourself after the visit. The report template is located in Microsoft Teams. It is best to complete it as soon as possible while the details of the visit are fresh in your mind.
  - Toastmasters International will review the report. If there are any concerns that need to be addressed, the report will be distributed to relevant departments for the purpose of sharing information or getting support for the concerns.
  - The report will be added to the region library available in Microsoft Teams so that you and the International Officers and Directors can access this information in the future.
  - Because a District Visit Report may contain confidential or sensitive information, the report is not shared with District leaders.
- ▶ **Corporate Visit Reports:** For each corporate visit, complete one report and submit all Corporate Reports with your District Visit Report. The report template is located in Microsoft Teams.
  - This report will be added to the region library available in Microsoft Teams so that you and the International Officers and Directors can access this information in the future.

- ▶ **Expense Reimbursement:** Toastmasters International will reimburse expenses according to **Protocol 10.0: Region Advisors Expenses**. You will be trained on how to use Toastmasters' online expense reporting system, called Concur Solutions, to request reimbursement. All expenses except for the per diem must include corresponding receipts.

Your expertise and enthusiastic approach to supporting, guiding, and mentoring District leaders will create strong leaders within the Toastmasters organization and out in the world. Never underestimate the influence you have as an individual and as a Toastmasters International Region Advisor!

### **Region Advisor Mid-Year and Year-End Assessments**

As part of our continued development of the Region Advisor Program, World Headquarters will send mid-year and year-end assessments to the District Directors, Program Quality Directors, Club Growth Directors, and District Public Relations Managers of the Districts in your region.

The results will be shared with you and the International President, and will include feedback on the District leaders' experience with you as their Region Advisor. This information will help us further develop the Region Advisor Program and will help you gain awareness of your strengths and possible areas of improvement.

# District Leader Training

Each program year, Toastmasters International provides two training events for District Directors, Program Quality Directors, and Club Growth Directors. Region Advisors help to facilitate these two events, as assigned by World Headquarters. The first, District Leader Training, is held before the International Convention in August. Mid-year Training in January is held throughout the month, with regions coming together.

Region Advisors' participation is essential to the success of District Leader Training. Your performance will directly affect the strength of your relationships with the District leaders throughout the program year. The World Headquarters Training Team will work with you to prepare for the training sessions you will be facilitating.

## District Leader Training Webinars

The World Headquarters Training Team will notify you via Microsoft Teams to participate in the Train-the-Trainer webinars that will prepare you to facilitate District Leader Training.

You are required to participate in this webinar training once or twice a week in the months leading up to the events to prepare for August District Leader Training and Mid-year Training. Prior to each webinar, make sure to review the facilitator and participant materials, which will be located in Microsoft Teams. Practicing your presentation is important, as you only get one chance to make a first impression and connect with your audience. Practice your assigned sessions individually and during group webinars, adding your personal experiences to make the training more engaging. Ask questions and provide feedback on session content to ensure the best possible learning experience for District leaders. You can also practice with other Region Advisors, or in front of your club. Don't forget to ask for feedback.

## Attend Train-the-Trainer Session

Just before District Leader Training, all Region Advisors participate in a Train-the-Trainer session to complete final preparations for the program, including reviewing the logistics and addressing any last questions. Take this opportunity to increase your presentation confidence, practice effective facilitator skills, and ensure you make a good first impression on the District leaders.

## Facilitate District Leader Training

During District Leader Training, you will:

- ▶ Partner with fellow Region Advisors for session facilitation, as assigned.
- ▶ Ask questions and provide feedback to World Headquarters on session content to ensure the best possible learning experience for District leaders.
- ▶ Establish positive working relationships with District leaders. August District Leader Training may be your first face-to-face opportunity to get to know District leaders. Meeting with them at August District Leader Training is an effective way to reinforce the relationship you've established during monthly conference calls and start planning for potential District visits. Invite them to contact you personally and offer to meet during convention.
- ▶ Bring and express your enthusiasm, knowledge, and passion to share your experiences. This will help personalize the training content, thus making it even more powerful and relevant to the District leaders.

## Attend Region Advisor Training Debrief

All Region Advisors will meet after August District Leader Training and Mid-year Training with the World Headquarters staff to discuss their experiences. You will have the opportunity to identify successes and challenges as well as offer feedback and suggestions to World Headquarters to improve the training and preparation process.

# Participation at the International Convention

You will receive an email from World Headquarters inviting you to attend the International Convention. Once you RSVP online, you may book your flight and hotel reservations, and register for the convention on the same website. All instructions will be included in the invitation. Toastmasters International covers the cost of your transportation and hotel accommodations for the days you are required to attend August District Leader Training and the Region Relationships meeting. Although you are not required to attend the convention as a Region Advisor, you are encouraged to do so since you play an important role in the Districts' successes (refer to **Protocol 10.0: Region Advisors Expenses**).

If you choose to attend the full convention, a seat will be reserved for you and one guest at the following events:

- ▶ Opening Ceremonies
- ▶ Golden Gavel
- ▶ Hall of Fame
  - You are recognized and honored at the beginning of the event.
- ▶ Toastmasters International World Championship of Public Speaking®
- ▶ President's Inauguration

## Promoting the Region Advisor Role

During the exhibition hours, a Leadership Roles booth will be open to promote the Region Advisor and International Director roles. Volunteers at the booth are asked to encourage members to learn more about these leadership positions.

## Region Advisor Breakfast or Lunch

Each year, the past and current Region Advisors meet for breakfast or lunch. They review the year, share best practices, and discuss recommendations for improvements to the Region Advisor Program. Suggested improvements are provided to World Headquarters for consideration. Follow-up on the recommendations will be discussed with the Past Region Advisors Council on a teleconference in the new calendar year.

## Region Gatherings

The intent of the Region Gatherings is to build relationships among District leaders and members who are attending the convention. This is a fantastic opportunity to strengthen the sense of community in a setting where face-to-face interaction is taking place. This is a time where leaders and members review the year and share best practices and ideas on how to be successful in achieving the District mission. It is the responsibility of the Region Advisor to plan and organize the event. Collaborate with the International Director to assist in coordinating the Region Gathering. World Headquarters is not involved in the organization of this event. Along with exchange of best practices, the Region Gathering may also involve a District roast of the outgoing International Director and/or Region Advisor, as well as the announcement of candidates for International Director. If you need to order food and beverage for this gathering, please note that each hotel may have different food and beverage requirements, so please contact the Toastmasters International Meeting Planning Team at [meetingplanning@toastmasters.org](mailto:meetingplanning@toastmasters.org).

## President's Inauguration and Celebration

The Immediate Past International President presides over the induction of newly elected International Officers and Directors. This elegant celebration marks the close of the convention.

## In Closing

Your term as a Region Advisor will be exciting and interesting. At the conclusion of your term, you will reflect on what you have learned, the new friendships you have formed, the service you have provided to the Districts, and how fulfilling the experience was for you.

## What's Next

Once you complete your term as a Region Advisor, you are now part of the Past Region Advisor community. Members of this community will have opportunities to serve on the Past Region Advisor Council (PRAC), who are responsible in reviewing topics as assigned by the Executive Committee to continuously enhance the Region Advisor Program.

Additionally, there is the Region Advisor Mentor Program. This is a great opportunity for you to continue serving as a mentor to a Region Advisor or an aspiring Region Advisor.



# Calendar-at-a-Glance

The following pages are best practices for fulfilling your responsibilities.

April-Transition In	May	June
<ul style="list-style-type: none"> <li>▶ Participate in Region Advisor welcome and orientation call with World Headquarters and International President</li> <li>▶ Participate in transition calls with predecessors and World Headquarters</li> <li>▶ Review Region Advisor Tutorials and previous District Visit Reports</li> <li>▶ Begin transition training with predecessor</li> <li>▶ Participate in monthly Region Advisor conference call with District leaders</li> <li>▶ Participate in monthly Region Advisor conference call</li> <li>▶ Review instructions from WHQ regarding Microsoft Teams</li> <li>▶ Review Region Advisor e-toolkit from WHQ</li> </ul>	<ul style="list-style-type: none"> <li>▶ Assess each District leader's skills and attributes</li> <li>▶ Identify areas where support is needed</li> <li>▶ Create a specific action plan for each District</li> <li>▶ Work with predecessor to discuss Districts in need of a District visit</li> <li>▶ Review District visit process instructions from WHQ</li> <li>▶ Develop Region Advisor visit plan with incoming District leaders</li> <li>▶ Participate in transition calls with predecessors and World Headquarters</li> <li>▶ Participate in monthly Region Advisor conference call with District leaders</li> <li>▶ Make initial contact with newly elected District leaders</li> <li>▶ Participate in monthly Region Advisor conference call</li> <li>▶ Register for August District Leader Training and International Convention</li> <li>▶ Review conference call account information for your District leader calls</li> <li>▶ Continue transition training with predecessor</li> <li>▶ Receive business cards and name badge</li> </ul>	<ul style="list-style-type: none"> <li>▶ Participate in transition calls with predecessors and World Headquarters</li> <li>▶ Participate in monthly Region Advisor conference call with District leaders</li> <li>▶ Participate in monthly Region Advisor conference call and continue for the year</li> <li>▶ Attend District Leader Training webinars</li> <li>▶ Continue to make initial contact with newly elected District leaders</li> <li>▶ Continue developing the District visit plan with incoming District leaders</li> <li>▶ Submit District visit requests by June 30</li> <li>▶ Receive expectations from Toastmasters International about District Leader Training</li> <li>▶ Continue transition training with predecessor</li> </ul>



## Calendar-at-a-Glance

July	August	September
<ul style="list-style-type: none"> <li>▶ Attend District Leader Training webinars</li> <li>▶ Begin District visits</li> <li>▶ Review year-end Distinguished District results</li> <li>▶ Host your first monthly Region Advisor conference call with District leaders and continue for the year</li> <li>▶ Submit District leader conference call dates and times to WHQ for master calendar</li> </ul>	<ul style="list-style-type: none"> <li>▶ Visit Districts per approved schedule</li> <li>▶ Attend District Leader Training webinars</li> <li>▶ Attend Train-the-Trainer</li> <li>▶ Facilitate District Leader Training</li> <li>▶ Attend International Convention</li> <li>▶ Receive Mid-year Training dates and locations</li> <li>▶ Contact the International Director for your region</li> </ul>	<ul style="list-style-type: none"> <li>▶ Visit Districts per approved schedule</li> <li>▶ Submit Region Advisor applicant recommendations to WHQ</li> <li>▶ Submit Board of Directors candidate recommendations to WHQ</li> </ul>

# Calendar-at-a-Glance

October	November	December
<ul style="list-style-type: none"> <li>▶ Visit Districts per approved schedule</li> <li>▶ Receive and review District Success Plan for each of your Districts</li> </ul>	<ul style="list-style-type: none"> <li>▶ Visit Districts per approved schedule</li> <li>▶ Attend Mid-year Training webinars</li> <li>▶ Formation of RA Transition Committees</li> </ul>	<ul style="list-style-type: none"> <li>▶ Visit Districts per approved schedule</li> <li>▶ Attend Mid-year Training webinars</li> </ul>
January	February	March
<ul style="list-style-type: none"> <li>▶ Attend Mid-year Training webinars</li> <li>▶ Facilitate Mid-year Training</li> </ul>	<ul style="list-style-type: none"> <li>▶ Prepare for succession training</li> <li>▶ Focus on District Recognition Program achievement</li> </ul>	<ul style="list-style-type: none"> <li>▶ Prepare for succession training</li> <li>▶ Focus on District Recognition Program achievement</li> </ul>
April-Transition Out	May	June
<ul style="list-style-type: none"> <li>▶ Begin transition training with successor</li> <li>▶ Participate in monthly transition calls with successors and World Headquarters</li> <li>▶ Focus on District Recognition Program achievement</li> <li>▶ Invite successor to District leader conference calls</li> <li>▶ Introduce successor to District leadership teams to set them up for success</li> </ul>	<ul style="list-style-type: none"> <li>▶ Transition training with successor</li> <li>▶ Participate in monthly transition calls with successors and World Headquarters</li> <li>▶ Focus on District Recognition Program achievement</li> <li>▶ Invite successor to District leader conference calls</li> <li>▶ Encourage the future District Directors to invite your successor to visit the District</li> </ul>	<ul style="list-style-type: none"> <li>▶ Transition training with successor</li> <li>▶ Participate in monthly transition calls with successors and World Headquarters</li> <li>▶ Focus on District Recognition Program achievement</li> <li>▶ Invite successor to District leader conference calls</li> <li>▶ World Headquarters sends Region Advisor year-end survey to District leaders; survey results received in July</li> </ul>

# Resources

## Brand Resources

The Toastmasters brand unites all clubs and Districts and makes our organization strong and recognizable. When Districts or clubs create materials, it is important that they carry through the Toastmasters brand so that our message is consistent.

Use of trademarks and copyrighted materials apply to all members, whether current or former, at all levels of the organization, and are covered under **Policy and Protocol 4.0: Intellectual Property**.

There are several resources available to help club and District leaders create brand-compliant materials.

- ▶ The **Brand Manual** provides guidance for communicating and implementing the Toastmasters International brand.
- ▶ A **Trademark Use Request** should be submitted any time a club or District wishes to create an item for production. To allow for review of these requests and adequate production time, the request should be submitted a minimum of two weeks prior to the desired production deadline.
- ▶ The **Brand Portal** houses the Brand Manual, Trademark Use Request, various templates, and a professional image gallery that can be used to create products and materials.
- ▶ The **Policy Violations Quick Reference Guide** provides guidance on how to identify and report any intellectual property violations you may encounter during your term of office. Pages 18 and 19 of this guide include information specific to intellectual property violations.

## Region Advisor Social Media Best Practices

### Principles of Region Advisor Social Media Best Practices

- ▶ The tone of all social media posts should be positive, encouraging, and unbiased.
- ▶ The Region Advisor's primary role is to focus on District support, rather than social media postings.
- ▶ Social media is a tool to help the RA in their role and should not replace direct contact with the District leaders.
- ▶ Video posts should focus on District support, achievements, and celebrations, rather than on the RA.
- ▶ The RA posts should be in compliance with **Policy 3.0: Ethics and Conduct** and **Protocol 4.0: Intellectual Property**.
- ▶ All region social media profiles must include the Trademark acknowledgment in **Protocol 4.0: Intellectual Property, Section 2.H**.
- ▶ All region social media profiles must include the disclaimer in **Protocol 4.0: Intellectual Property, Section 2.L**.
- ▶ All content posted by an RA should be posted on the site of the region they are serving. Sharing from one District site to the region site is acceptable, but not from one District site to another District site.
- ▶ The RA should be discerning about which posts they share and where they share them. The same discretion applies to liking and commenting on posts, as well as tagging people in posts, whatever the location.
- ▶ If an RA is uncertain about the content of a social media post, contact [regionadvisor@toastmasters.org](mailto:regionadvisor@toastmasters.org).

Purpose of RA Social Media Posts	Examples of Best Practices
To build awareness of significant events	<ul style="list-style-type: none"> <li>▶ District Leader Training (August and Mid-year)</li> <li>▶ International Convention</li> </ul>
To draw attention to key dates in the Toastmasters calendar	<ul style="list-style-type: none"> <li>▶ Membership dues renewal dates</li> <li>▶ Membership building campaign dates</li> </ul>
To provide links to current events and content	<ul style="list-style-type: none"> <li>▶ Links to websites of Districts within the region</li> <li>▶ Links to District conferences</li> <li>▶ Links to current media, e.g., the latest edition of <i>The Toastmaster</i> magazine</li> <li>▶ Links to the Toastmasters International website, social media profiles, Brand Portal</li> <li>▶ Links to District performance information on the Toastmasters International website (Dashboard)</li> <li>▶ Promotion of Toastmasters programs</li> <li>▶ Mission and vision of Toastmasters International</li> <li>▶ District and club missions</li> <li>▶ Articles and ideas to motivate Districts to achieve goals</li> </ul>
To celebrate the achievements of Districts	<ul style="list-style-type: none"> <li>▶ New clubs chartered</li> <li>▶ Toastmasters International awards</li> <li>▶ Membership building awards</li> <li>▶ Presenting District leaders with training certificates related to Convention and Mid-year training</li> <li>▶ Recognition of Districts that have achieved or progressed toward achievement of District goals</li> </ul>
To share District best practices	<ul style="list-style-type: none"> <li>▶ Club building</li> <li>▶ Membership retention</li> <li>▶ Club quality</li> <li>▶ Public relations</li> <li>▶ Leadership development</li> </ul>
Branding of RA posts	<ul style="list-style-type: none"> <li>▶ Posts must comply with Toastmasters International Brand Guidelines at all times</li> <li>▶ Address all posts which do not comply with Toastmasters International Brand Guidelines</li> </ul>

Purpose of RA Social Media Posts	Examples of Best Practices
Administration of region social media pages, groups, and/or websites	<ul style="list-style-type: none"> <li>▶ RAs are accountable for all social media content posted on their region's sites. Current RAs should be administrators of the sites in the region they are serving</li> <li>▶ Incoming RAs should be added as administrators during the April–June transition period</li> <li>▶ Outgoing RAs are to hand over administration controls of the sites to the incoming RAs by the end of June</li> <li>▶ RAs may appoint members of the region to act as administrators. The administrators are not there to draw attention to themselves</li> <li>▶ Current District officers, current Board Members, and International Officer and Director candidates (including their campaign team) may not act as administrators of the region site</li> <li>▶ It is essential that inappropriate posts be removed as soon as possible</li> <li>▶ Decide who can join your region's page/group. Members only? Only members from your region? Open to the public?</li> </ul>
Continuity	<ul style="list-style-type: none"> <li>▶ It is advised that region sites stay in effect from one year to another. It can be very confusing for members if a new group/site is created each year</li> <li>▶ Approach the administrators of unused/obsolete sites and ask for them to be archived</li> </ul>
Teamwork between RAs	<ul style="list-style-type: none"> <li>▶ Where there are two or more RAs per region, it is essential that they work together. Discuss up front how you will approach social media posts, manage the administration, and deal with any problems that arise</li> <li>▶ It is essential that the RAs are seen to be working together and not to be competing with one another</li> </ul>
Social media posts during District visits	<ul style="list-style-type: none"> <li>▶ Posts should celebrate achievements of District being visited</li> <li>▶ Posts may celebrate efforts of District leaders</li> <li>▶ Posts may highlight key events (e.g., corporate visits), as long as the organization gives permission to do so</li> <li>▶ During District visits, social media posts should focus on the work of the RA, rather than social events surrounding the visit</li> </ul>

# Resources

## Region Advisor Social Media Participation Chart

Location of Posting		Content related to Toastmasters events at Club, District, Region, or International level	Toastmasters-related content from World Headquarters, other than events	Non-Toastmasters-related content from any source
Personal	On the RA's personal social media profile	Yes	Yes, once made public by World Headquarters	Yes, in accordance with Policy 3.0 and Protocol 4.0
Members	On the social media profile of any Toastmasters leader or member	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices
Club	On the social media profile of a club of which they are a member	Yes, in accordance with RA Social Media Best Practices	Yes, once made public by World Headquarters	Yes, in accordance with Policy 3.0 and Protocol 4.0
	On the social media profile of a club of which they are not a member	No	No	No
District	On the social media profile of their declared home District	Yes, in accordance with District practices	Yes, in accordance with District practices	Yes, in accordance with Policy 3.0 and Protocol 4.0
	On the social media profile of a District they are serving as RA	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices
	On the social media profile of any other District	No	No	No



Location of Posting		Content related to Toastmasters events at Club, District, Region, or International level	Toastmasters-related content from World Headquarters, other than events	Non-Toastmasters-related content from any source
Region	On the social media profile of the region they are serving as RA	Yes	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices
	On the social media profile of their declared home region if they are serving another region	No	No	No
	On the social media profile of any region which they are not serving	No	No	No
Toastmasters International	On the Toastmasters International social media profiles	No	No	No
External	On non-Toastmasters social media	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with RA Social Media Best Practices	Yes, in accordance with Policy 3.0 and Protocol 4.0



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