



REGION ADVISOR HANDBOOK



**WHERE LEADERS
ARE MADE**

Region Advisor HANDBOOK

Thank you to the following region advisors for assisting with the updated version of this handbook.

Subbi Mathur 2015–2017
Kelly Nielsen 2015–2017
Jesse Oakley, III 2016–2017
Natalie Palmer 2016–2017
Carol Prahinski 2016–2017
Linda Rhea 2016–2017
Aletta Rochat 2016–2017
Monnica Rose 2015–2017

TOASTMASTERS INTERNATIONAL

P.O. Box 9052 • Mission Viejo, CA 92690 • USA
Phone: +1 949-858-8255 • Fax: +1 949-858-1207
www.toastmasters.org

© 2017 Toastmasters International. All rights reserved. Toastmasters International, the Toastmasters International logo, and all other Toastmasters International trademarks and copyrights are the sole property of Toastmasters International and may be used only with permission.

Item 1395



**WHERE LEADERS
ARE MADE**



LETTER FROM THE INTERNATIONAL PRESIDENT

To Our Region Advisors,

Congratulations on being appointed a region advisor of Toastmasters International! You should feel great pride in being selected amongst our many applicants for our fourteen positions.

This program is now in its seventh year of providing support and guidance to district leaders. In this role, you will support the district leaders as they fulfill the district mission of building new clubs and supporting all clubs in achieving excellence.

To help you fulfill your role, Toastmasters International has created this handbook. It's filled with information about your role, your responsibilities and our expectations of region advisors. The handbook was developed with past region advisors who contributed their insights and best practices.

Thank you for choosing to serve the districts, members and our organization. If you have any questions about your role, the region advisor program coordinator is your primary contact and is available to support your efforts. To reach the program coordinator email regionadvisor@toastmasters.org or call +1 949-858-8255.

I am sure you will face challenges with this role. Some district teams will require much assistance, and some very little. You may have to help some leaders manage internal conflict. I ask you to help the teams focus on achieving team success at the end of the program year. This means some members will need to compromise. At all times they should respect one another and listen to one another as they plan and execute a program to see them finish as a Distinguished District.

The skills you will practice this year, and the skills the district leadership team will practice, will help you and them as they serve as leaders in Toastmasters in the future, and outside of Toastmasters.

I wish you well as you begin this challenging and rewarding assignment.

Regards,

Mike Storkey, DTM

2016-2017 International President

Toastmasters International Mission

We empower individuals to become more effective communicators and leaders.

District Mission

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

Club Mission

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

Toastmasters International Values

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

Toastmasters International Envisioned Future

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

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
-

CONTENTS

■ LETTER FROM THE INTERNATIONAL PRESIDENT	2
■ INTRODUCTION	6
■ THE ROLE OF THE REGION ADVISOR	7
Term of Office	7
Expectations, Competencies and Responsibilities	8
■ CALENDAR-AT-A-GLANCE	10
■ KEY RELATIONSHIPS	13
Your Region Advisor Predecessor	13
District Leaders	13
Club Growth Director	13
Public Relations Manager	14
Program Quality Director	15
District Director	15
Fellow Region Advisors	17
International Directors	17
World Headquarters	18
■ APRIL 1-JUNE 30 ONBOARDING AND TRANSITION	19
Communication with Other Region Advisors and Toastmasters International	19
Identifying New Region Advisors	19
April	19
Region Advisor Welcome and Orientation Call	19
Region Advisor Transition Call with World Headquarters	19
Training with Your Predecessor	20
Monthly District Leader Conference Calls	20
Monthly Region Advisor Conference Calls	21
The District Visit Process	21
May	21
Conference Calls	21
District Leader Training and International Convention Registration	21
Attendance at the International Convention	21
June	21
Conference Calls	21
Making Initial Contact with New District Leaders	21
Plan Monthly District Leader Conference Calls	22
Preparation for August District Leader Training	23
Training with your Predecessor	23

■ JULY 1–AUGUST 31: STRENGTHEN RELATIONSHIPS	24
July	24
First Monthly District Leader Call	24
District Leader Training Webinars	24
District Assessments	24
Work with the International Director	24
Work with Districts	24
August	25
District Leader Training Webinars	25
Attend Train-the-Trainer Session	25
Facilitate District Leader Training	25
Attend Region Advisor Training Debrief	25
Participation at the International Convention	25
■ SEPTEMBER 1–JUNE 30	27
September	27
October	27
November	27
Mid-year Training Webinars	27
December	27
January	27
February–March	28
Leadership Development, Shadowing and Succession Planning	28
April–June	28
■ CRITICAL INFORMATION	29
Travel	29
District Visits	29
Region Advisor Visits from July–December	29
Region Advisor Visits from January–June	30
Region Advisor Corporate Visits	30
International Officer and Director Visits	30
Corporate Recognition Visits	30
District Visit Process	31
Prior to the Visit	31
RA District Visit Kits	32
During the Visit	32
After the Visit	32
■ FREQUENTLY ASKED QUESTIONS	34



INTRODUCTION

Congratulations on being appointed to your new role.

Region advisors play a vital role in fulfilling the Toastmasters International mission: *We empower individuals to become more effective communicators and leaders.*

Successful region advisors expand the capacity of the district leadership teams in their region through coaching, guiding, training and collaborating. By sharing your knowledge and experience, district leaders become stronger, more confident and better prepared to achieve the district mission: *We build new clubs and support all clubs in achieving excellence.*

The time that you spend as a region advisor will be challenging, gratifying and rewarding.

The region advisor role is unique; your responsibility is to guide the district leaders in your region to success, yet you do not have responsibility for completion of tasks. There is no management of work or people. Instead, it is a leadership opportunity where your influence, encouragement and experience can make all of the difference for each district you serve. You will work with your districts' leaders individually and collectively during the course of your term, and your relationship with each will be different. How you approach the role and the individuals you serve will determine your success.

The intent of this *Region Advisor Handbook* is to provide you with a clear understanding of the position, the objectives and the expectations. It also includes best practices from former region advisors to start you on the path toward success in your term of office.

THE ROLE OF THE REGION ADVISOR

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.

Although most district leaders appreciate the valuable service and support that region advisors can provide, they are not required to work with region advisors. Although you may want to assist by taking on some of the district leaders' work, this isn't part of your responsibilities.

Your goal is to support the district leaders in achieving the district mission as measured by the distinguished district program. Specifically, you:

- ▶ Assess the abilities of the leaders to achieve the district mission.
- ▶ Develop a plan for supporting the district leaders that will lead them to achieve the district mission.
- ▶ Leverage your personal competencies.
- ▶ Provide marketing support and expertise that expands the districts' capacity to grow clubs and grow membership.
- ▶ Leverage your experience and success as a Toastmasters leader to help district officers.
- ▶ Coach the district leaders to achievement by assessing each District Success Plan and mentoring to optimize individual performance.
- ▶ Establish trusting relationships with district leaders through frequent and consistent communication.

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.

For additional information, please see **Policy and Protocol, Policy 10.0: Region Advisors, 4. Term of Service.**

EXPECTATIONS, COMPETENCIES AND RESPONSIBILITIES

- ▶ Use your knowledge of marketing to collaborate with district leaders in assessing each district's marketing systems. Assist with District Success Plans by helping to develop and support marketing strategies.
- ▶ Share your expertise in leading district operations by mentoring new leaders so that they understand how to successfully manage their districts. This includes working with the CGDs to identify marketing strengths and necessary improvements, as well as coaching the PRMs to ensure that each district's public relations program is in alignment with district objectives.
- ▶ Leverage your skills in conflict management by assisting district leaders in resolving conflicts when necessary or appropriate.
- ▶ Model leadership skills and maintain a professional demeanor at all times.
- ▶ Seek out, identify and encourage talented, qualified members to apply for the region advisor role.
- ▶ Coach and mentor district leaders to provide leadership development and succession planning.
- ▶ Encourage the district leaders to achieve District Recognition Program goals.
- ▶ Facilitate and train district leaders at August District Leader Training and January Mid-year Training. Build credibility through preparation and planning.
- ▶ Utilize your verbal and written communication skills to establish and lead regular conference calls with district leaders to provide support and encouragement.
- ▶ Visit districts once per term (more often only in special circumstances), teach corporate visit skills and strategies.
- ▶ Communicate with the region's international director to maintain awareness of district progress and achievement.
- ▶ 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.
- ▶ Plan to spend approximately 25 to 30 hours per month in your role.

The expected outcome for each region advisor, regardless of region or district, is to support district leaders in achieving the district mission. Your efforts are measured by the achievement of the districts in the Distinguished Recognition Program.

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 significant impact on the individuals you support and ultimately the success of the districts you serve. Your challenge is to assess the type of assistance and support each leader needs, and provide it.

The region advisors who are most successful possess a range of competencies:

- ▶ 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

The transition period between when you are appointed and when you begin your term is the best time to get to know your district leaders, assess their ability to achieve the district mission and identify where they will need your coaching, mentoring and support. You'll want to evaluate and consider:

- ▶ Capability of each team/person in their role (CGD, PQD, DD)
- ▶ Team cohesion
- ▶ Club growth abilities
- ▶ Membership-building in clubs
- ▶ Leadership pipeline
- ▶ Club leader training
- ▶ District leader training
- ▶ History of achievement
 - Teams/committees

You'll use these competencies in a variety of ways throughout your term.

On the following pages, you'll find a Calendar-at-a-Glance for your term, as well as what to expect for each month of the year and best practices for how to fulfill your responsibilities.

RESOURCES

District Administrative Bylaws

District Recognition Program (Item 1490)

Policy 10.0: Region Advisors

Protocol 10.0: Region Advisors, 1. Region Advisor Expenses

Region Advisor Tutorials

For assistance from World Headquarters, email
regionadvisor@toastmasters.org

CALENDAR-AT-A-GLANCE

APRIL-Transition In

- ▶ Participate in region advisor welcome and orientation call with World Headquarters and International President
- ▶ Participate in transition calls with predecessors and World Headquarters
- ▶ Review **Region Advisor Tutorials**
- ▶ Begin transition training with predecessor
- ▶ Participate in monthly region advisor conference call with district leaders
- ▶ Participate in monthly region advisor conference call
- ▶ Review instructions from WHQ regarding the Meeting Room
- ▶ Review region advisor e-toolkit from WHQ
- ▶ Receive business cards and name badge
- ▶ Review district visit process instructions from WHQ

MAY

- ▶ Assess each district leader's skills and attributes
- ▶ Identify areas where support is needed
- ▶ Create a specific action plan for each district
- ▶ Work with predecessor to discuss districts in need of a district visit
- ▶ Develop strategy for working with district leaders to identify the need for a district visit
- ▶ Participate in transition calls with predecessors and World Headquarters
- ▶ Participate in monthly region advisor conference call with district leaders
- ▶ Participate in monthly region advisor conference call
- ▶ Register for District Leader Training and International Convention
- ▶ Review conference call account information for your district leader calls
- ▶ Continue transition training with predecessor

JUNE

- ▶ Participate in transition calls with predecessors and World Headquarters
- ▶ Participate in monthly region advisor conference call with district leaders
- ▶ Participate in monthly region advisor conference call and continue for the year
- ▶ Make initial contact with newly elected district leaders
- ▶ Receive expectations from Toastmasters International about District Leader Training
- ▶ Continue transition training with predecessor
- ▶ WHQ sends district assessment survey to district leaders
- ▶ Review district visit kit instructions from WHQ

CALENDAR-AT-A-GLANCE

JULY

- ▶ Attend District Leader Training webinars
- ▶ Work with district leaders to identify the need for a district visit
- ▶ Begin district visits
- ▶ Review district assessment results
- ▶ Review year-end Distinguished District results
- ▶ Host your first monthly region advisor conference call with district leaders and continue for the year
- ▶ Contact the international director for your region
- ▶ Submit district leader conference call dates and times to WHQ for master calendar
- ▶ Receive Mid-year Training dates and locations

AUGUST

- ▶ Attend District Leader Training webinars
- ▶ Attend Train-the-Trainer
- ▶ Facilitate District Leader Training
- ▶ Attend International Convention
- ▶ Submit district visit requests by August 31

SEPTEMBER

- ▶ Review approved district visit schedule from World Headquarters
- ▶ Communicate approval of district visit requests to district leaders
- ▶ Visit districts per approved schedule
- ▶ Submit region advisor applicant recommendations to WHQ
- ▶ Submit Board of Directors candidate recommendations to WHQ

CALENDAR-AT-A-GLANCE

OCTOBER

- ▶ Prepare for Mid-year Training
- ▶ Visit districts per approved schedule
- ▶ Receive and review District Success Plan for each of your districts

NOVEMBER

- ▶ Attend Mid-year Training webinars
- ▶ Visit districts per approved schedule

DECEMBER

- ▶ Attend Mid-year Training webinars
- ▶ Visit districts per approved schedule

JANUARY

- ▶ Attend Mid-year Training webinars
- ▶ Facilitate Mid-year Training
- ▶ Limit corporate visits for the remainder of the year

FEBRUARY

- ▶ Prepare for succession training
- ▶ Visit districts per approved schedule
- ▶ Focus on District Recognition Program achievement

MARCH

- ▶ Prepare for succession training
- ▶ Visit districts per approved schedule
- ▶ Focus on District Recognition Program achievement

APRIL-Transition Out

- ▶ Visit districts per approved schedule
- ▶ Begin transition training with successor
- ▶ Participate in monthly transition calls with successors and World Headquarters through June
- ▶ Focus on District Recognition Program achievement
- ▶ Invite successor to district leader conference calls
- ▶ Invite successor to monthly region advisor conference calls

MAY

- ▶ Visit districts per approved schedule
- ▶ Transition training with successor
- ▶ Focus on District Recognition Program achievement
- ▶ Invite successor to district leader conference calls

JUNE

- ▶ Visit districts per approved schedule
- ▶ Transition training with successor
- ▶ Focus on District Recognition Program achievement
- ▶ Invite successor to district leader conference calls
- ▶ World Headquarters sends region advisor year-end survey to district leaders
- ▶ Review region advisor year-end survey results in July

KEY RELATIONSHIPS

In your role, you will work closely with your predecessor, district leaders in your region, fellow region advisors, international directors in your region and World Headquarters.

YOUR REGION ADVISOR PREDECESSOR

Building a strong relationship with your predecessor is the key to your success during the April–June transition period, as you will receive much of your training from this person. Although he or she will continue to lead the effort of working with district leaders until the end of their term, you will be invited to actively engage with these leaders. Be sure to ask questions to gain first-hand knowledge from an experienced region advisor. Work together and recognize that you may have very different working styles.

DISTRICT LEADERS

You will fulfill a number of duties when interacting with DDs, PQDs, CGDs and PRMs. 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.

CLUB GROWTH DIRECTOR

As the district leader who is responsible for all aspects of club growth and retention and individual membership growth, the CGD will benefit from your marketing expertise. The CGD 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. We encourage the CGD to develop a district marketing plan in conjunction with district team members. Keep 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 CGD. Please read and encourage the CGDs to read and refer to this guide often through the program year.

Corporate Visits

For important information on corporate visits, please see the Critical Information section on **page 29**.

Retention

The worldwide average club retention figure is 55.4 percent. This means that at any given time, an average of 44.6 percent of members choose to leave their clubs. One of your responsibilities as a region advisor is to encourage district leaders to recognize that membership and club retention is just as important as club growth.

If retention is a challenge for any of your districts, work with the PQD, CGD and their teams to identify possible strategies to increase retention. Then you can collaborate on these strategies to help motivate members to stay in their clubs. Evaluate the district's specific challenges and adapt your suggestions accordingly. Be prepared to discuss practical approaches and personal experiences.

Rather than directing district leaders, serve as a resource and help them focus on solutions. Encourage district leadership to focus on the importance of club value and retention at Toastmasters Leadership Institutes (TLIs). If the districts ask, you may give education sessions at TLIs. 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

Once the CGD is elected, he or she trains and supervises club sponsors, mentors and coaches. His or her responsibilities also include managing the Club Coach program to help weak clubs achieve recognition in the Distinguished Club Program.

As a region advisor, you can help the CGD develop a plan for building and maintaining strong club sponsor, mentor and coach programs. The first step is to make sure he or she understands the structure, requirements and practice 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.

Periodically check on the health of the clubs in your region. You can discuss district performance with the district leaders during a regular monthly call or a private conversation.

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 Distinguished Clubs

As a region advisor, you play an integral role in assisting districts achieve Distinguished recognition.

The Distinguished Club Program serves as the foundation of the District Recognition Program. 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.

If you focus on helping the districts fulfill the district mission, achieving Distinguished recognition is very achievable. Promote the effectiveness of assigning club coaches to new or 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.

PUBLIC RELATIONS MANAGER

The PRM is responsible for coordinating publicity efforts in the district. He or she publicizes district news and events, creates media opportunities and maintains communication between the district, its members and the public.

Work with each district's PRM as you do with the DD, PQD and CGD. You can help the PRM by:

- ▶ Hosting a call early in the year with your districts' PRMs and CGDs to review roles and determine how they can best work together.
- ▶ Hosting monthly calls with the PRMs to share best practices on topics such as the district website and newsletter; public relations; promoting Toastmasters through radio, television and billboards; and marketing support.

Direct the PRMs 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.

RESOURCES

Club Growth Director Handbook (Item 110)

Club Sponsor, Mentor and Coach Training Materials

Distinguished Club Program (Item 1111)

PRM Training Webinar Slides

PRM Training Webinar Video

Public Relations Resources

PROGRAM QUALITY DIRECTOR

The PQD is responsible for all aspects of education and training within the district. This includes supporting quality club programming efforts, promoting the Distinguished Club Program, and planning and executing the district conference.

As the region advisor, you help the PQD to remember key deadlines and understand their role.

Club Quality

Members join Toastmasters to become more effective communicators and leaders. They stay in Toastmasters because the club provides value and meets their individual needs. A quality club environment is the single most important factor in membership retention.

With your guidance, the district leaders should agree on Club Quality Standards outlined in the *Moments of Truth* (Item 290) and the correlation with the Distinguished Club Program. Then have them explore how to determine if a club is of high quality, and finally, help them to create an action plan for working with area directors to ensure club quality.

The PQD should encourage district leaders to have area directors present *Moments of Truth* in an interesting manner to their clubs when they visit twice a year. Encourage them to tailor the second presentation as a reminder, as opposed to giving the same presentation word-for-word.

DISTRICT DIRECTOR

It is ultimately the DD who makes the decision of whether to work with the region advisor. By working with you, the DD can benefit from your experience. You can assist him or her 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 DD, PQD and CGD with the development of the District Success Plan. Also, recommend that these leaders use your experience as a resource for ideas throughout the program year. Be sure to review the District Success Plan thoroughly before each district visit and please remind district leaders that the District Success Plans are due to World Headquarters by September 30.

Conflict Resolution

You may be asked to help alleviate conflict within your districts. You may not need to be involved in the resolution, so err on the side of caution. It is best to identify the severity of the situation and decide if you can assist or if District Leader Service and Support 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 call District Leader Service and Support or email districts@toastmasters.org for assistance.

When addressing conflicts, remember the following guidelines:

- ▶ 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 values: Integrity, Respect, Service, and Excellence. You can demonstrate these 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 the *Describe, Explain, Share and Compromise (DESC)* model 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. Take the Facilitating Healthy Conflict online training for region advisors to help guide district leaders and review the *Communication and Conflict* resources on the Toastmasters website.

Goal-setting

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

Although assisting the district with the marketing-related budget is not a primary region advisor responsibility, the district may ask for your support. You are welcome to assist based on your experience and comfort level. You can also guide the district leaders to District Finance at districtfinancialquestions@toastmasters.org, and the financial tools available on the Toastmasters website.

RESOURCES

District Finance

Communication and Conflict

District Success Plan

Facilitating Healthy Conflict Module

Policy and Protocol, Policy 3.0: Ethics and Conduct

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 District Leader Training and the International Convention. Each month the region advisors participate in a conference call to share best practices, discuss specific issues and support one another. Make every effort to join these 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 service to your districts.

International directors are an excellent source of advice and guidance for district leaders and region advisors. Partner with them at District Leader Training, 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. Districts will benefit from your collaborative relationship by receiving your knowledge and the international director's strategic perspective.

WORLD HEADQUARTERS

You will receive communication and support from World Headquarters. 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 or +1 949-858-8255.

The Chief Executive Officer, Chief Operations Officer and Chief Member Engagement & Support Officer are also available to support you.

APRIL 1–JUNE 30

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 should work closely with your predecessor who will mentor, train and provide guidance on your new role.

COMMUNICATION WITH OTHER REGION ADVISORS AND TOASTMASTERS INTERNATIONAL

Toastmasters International communicates with region advisors through a social network called the Meeting Room. You will receive instructions from the region advisor program coordinator on how to use this tool.

Use the Meeting Room to post helpful tips or other information that will be useful to the region advisors. However, for questions or inquiries pertaining only to your region or operational topics not covered in a community thread, please email regionadvisor@toastmasters.org versus posting to the Meeting Room.

IDENTIFYING NEW REGION ADVISORS

Throughout your term, be on the lookout for future region advisors. It is likely certain individuals will stand out as leaders and already have the skills and qualifications to serve as a region advisor. You might speak to them during conference calls, district visits, District Leader and Mid-year Training and leadership development activities within your own district. Encourage them to apply to be a region advisor position in July.

APRIL

REGION ADVISOR WELCOME AND ORIENTATION CALL

In April, the on-boarding process begins with an orientation telephone call with all newly appointed region advisors, the International President, International President-Elect and representatives from World Headquarters.

During the call we'll discuss a range of topics to help you become oriented to your new role.

REGION ADVISOR TRANSITION CALL WITH WORLD HEADQUARTERS

Participants on this call will be newly appointed RAs, their predecessors and representatives from World Headquarters. The purpose of this call is to discuss transition training expectations. The second-term region advisors will share their experience and provide suggestions for success in your new role. These calls will also be held in May and June.

TRAINING WITH YOUR PREDECESSOR

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
- ▶ Copies of each District's Success Plan so that you can review them 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 District Leader and Mid-year Training
- ▶ District Visit Reports posted to the region libraries in the Meeting Room
- ▶ District assessments from last year. The purpose of the assessment is to obtain additional information about the district's needs so that you can provide the proper guidance. District leaders will complete a new assessment, and you will receive results for each district in July.
- ▶ Monthly conference calls with district leaders
- ▶ Any other reports/resources that might be helpful

During the transition period, your predecessor is the primary contact for all district leaders in the region. However, during this time, he or she will support your efforts to build relationships with these leaders and establish yourself as a trusted advisor. There are many ways to communicate with your district leaders, but one of the most effective is to hold consistent monthly conference calls.

MONTHLY DISTRICT LEADER CONFERENCE CALLS

Be sure to join the district leader conference calls organized by your predecessor so that you quickly become familiar with the districts in your region. The purpose of these calls is for district leaders to share best practices, marketing ideas, challenges, solutions and successes.

You'll also have the opportunity to observe how your predecessor manages these calls. You may decide to conduct your calls in a similar way or take an entirely different approach. If the existing call times work for the majority of district leaders, you may choose to maintain the same schedule. However, you may need to poll the new leaders when they take office in July to see which days and times are best for them.

Toastmasters International will assign to you a conference call account 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 World Headquarters at regionadvisor@toastmasters.org for the master calendar.

MONTHLY REGION ADVISOR CONFERENCE CALLS

Each month region advisors organize and participate in a one-hour conference call to share best practices, clarify information and collaborate on current initiatives. The region advisors rotate moderator and scribe responsibilities each month. 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.

THE DISTRICT VISIT PROCESS

You will learn about the process in April, but please see the Critical Information section on **page 29** for additional details.

MAY

CONFERENCE CALLS

Participate in the monthly region advisor and district leader conference calls, as well as the second region advisor transition conference call with World Headquarters.

DISTRICT LEADER TRAINING AND INTERNATIONAL CONVENTION REGISTRATION

You will receive an email from World Headquarters inviting you to attend District Leader Training and the International Convention. Once you RSVP online, you can book your flight and hotel reservations and register for convention. 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 District Leader Training.

The World Headquarters Training team will contact you to request your availability for the Train-the-Trainer webinars which will prepare you to facilitate District Leader Training.

ATTENDANCE AT THE INTERNATIONAL CONVENTION

In June, you'll be asked to confirm your attendance at the International Convention and at all the special events associated with the convention such as the Opening Ceremonies, Hall of Fame, Golden Gavel, World Championship of Public Speaking® and the President's Inauguration and Celebration. We encourage you to attend convention, but it is not required.

JUNE

CONFERENCE CALLS

Participate in the monthly region advisor and district leader conference calls, as well as a final all-region advisor transition call. Your predecessor will answer your questions and continue to share lessons learned during his or her term as region advisor.

MAKING INITIAL CONTACT WITH NEW DISTRICT LEADERS

By mid-June, the new district leaders will be elected. The district officer lists are due to World Headquarters by July 15. Once all lists are entered into the Toastmasters International database, you will receive contact information for the leaders in your

region. However, you are welcome to ask your predecessor to request the information from the district before that time. 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.

You can send an email or call each district leader individually. Please contact the DD 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 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 before District Leader Training to get acquainted or
- ▶ Request to schedule a 15-minute meeting with new district leaders at District Leader Training in August or during the International Convention. The intention 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 create or update the District Success Plan and district budget. Ensure that they are familiar with the requirements for submitting various reports. It's also wise to emphasize that the more clubs in the district that achieve Distinguished recognition, the stronger the district will be.

PLAN 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.

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 DD, PQD, CGD and PRM)
- ▶ With all individuals holding the same role, such as all region DDs
- ▶ One-on-one calls initiated by you or a district leader upon request
- ▶ Weekly region advisor open office hours (no appointment needed)

The methods of communication you use will also vary, but the most frequently used modes of communication include email, telephone, Skype, Facebook and WhatsApp.

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.

Know Toastmasters International **Policy and Protocol** pertaining to district leaders so that you can provide guidance to them with confidence.

PREPARATION FOR AUGUST DISTRICT LEADER TRAINING

Each program year, Toastmasters International provides two in-person training opportunities for DDs, PQDs and CGDs. Region advisors help to facilitate these two trainings. The first, District Leader Training, is held just before the International Convention in August. Mid-year Training in January is held at various locations around the world.

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.

In June and July, you'll participate in webinar training once or twice a week for approximately six weeks to prepare for District Leader Training. Review facilitator and participant materials before each webinar. Practicing your presentation is important, as you only get one chance to make a first impression and connect with your audience. Practice assigned sessions individually and during group webinars adding your personal experiences to make the training more engaging. You can also practice in front of your club and ask for feedback.

TRAINING WITH YOUR PREDECESSOR

Review the district assessment survey results if you haven't already. Continue regular one-on-one calls with your predecessor. Identify areas of concern within each district and ask for your predecessor's advice. Please be mindful of allowing him or her to complete responsibilities of office through June 30. Although we encourage you to maintain your relationship with your predecessor, he or she is not required to continue with region advisor responsibilities after June 30.

JULY 1–AUGUST 31: STRENGTHEN RELATIONSHIPS

JULY

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 District Leader Training in August. 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.

Once your district leader conference call dates are scheduled, be sure to submit all dates to World Headquarters at regionadvisor@toastmasters.org for the master calendar.

DISTRICT LEADER TRAINING WEBINARS

You will continue webinar training until just before District Leader Training begins in August.

DISTRICT ASSESSMENTS

Toastmasters International sends a district assessment survey to all district leaders in June. The purpose of the assessment is to ascertain the district's needs so you can provide proper guidance. The results will be distributed to you in July and this information will help you to better understand district successes and challenges.

WORK WITH THE INTERNATIONAL DIRECTOR

If the international director of your region is in his or her first year, make contact and offer a standing invitation for him or her to join the monthly district leader calls. If he or she is a second-year international director, you may call to introduce yourself and ask to discuss the status of the districts from his or her perspective. It's up to the individual international director whether he or she participates. If you can confirm participation, set aside a few minutes during each conference call for him or her to discuss district visit plans and provide a brief update on Board activities as appropriate.

Consider having one-on-one calls with the international director to discuss district progress and achievement.

WORK WITH DISTRICTS

Work with district leaders to identify the need for a district visit. Ask your predecessor the best method of approaching the district leaders to offer your assistance. Each region advisor may have his or her specific style and you can incorporate that style or do what works best for you. Be sure to review the District Success Plans before you speak with the district leaders. This will show that you are aware of last year's plans and are available to help them achieve this year's goals.

AUGUST

DISTRICT LEADER TRAINING WEBINARS

You will continue webinar training until just before District Leader Training begins.

ATTEND TRAIN-THE-TRAINER SESSION

One day prior to District Leader Training in August, all region advisors participate in a live Train-the-Trainer session to practice presenting the training material. 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

At District Leader Training, you will:

- ▶ Partner with fellow region advisors for session facilitation, as needed.
- ▶ 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. District Leader Training may be your first face-to-face opportunity to get to know district leaders. Meeting with them at 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.

ATTEND REGION ADVISOR TRAINING DEBRIEF

All region advisors will meet after District Leader 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

Opening Ceremonies

The convention opens with the traditional Parade of Flags, a "State of the Organization" presentation by the International President and a featured presentation, usually by a past leader. You are not required to attend any of the individual events listed here, but your attendance is encouraged and appreciated. A seat will be reserved for you and one guest.

Region Advisor Breakfast

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

Hall of Fame

This is the premier event where Distinguished Districts are recognized for their achievements during the year. You play an important role in the districts' successes and are recognized and honored at the beginning of the event. A seat will be reserved for you and one guest.

Distinguished Districts Luncheon or Dinner

This is a special, invitation-only luncheon or dinner, typically held just before the Golden Gavel event. Invites are extended to the region advisors ending their term and the DDs, PQDs and CGDs from recent Distinguished Districts.

Golden Gavel

Distinguished District leaders will be recognized on stage at the beginning of the event. We encourage region advisors to attend in support of their Distinguished Districts. The Golden Gavel award is the highest honor that Toastmasters International gives to non-members. The award has been presented annually since 1959 to Distinguished individuals in the fields of communication and leadership. A seat will be reserved for you and one guest.

Leadership Roles Booth

A few region advisors are randomly selected to manage the Leadership Roles Booth during convention. This booth is open during the candidates' reception and the purpose is to help promote the international director and region advisor roles. If selected, you are asked to actively encourage members to come to the booth and learn more about these leadership positions.

At the booth, engage members by asking about their leadership goals and sharing your experience as a region advisor. You can provide details about the application and training process, engage in conversation about why you decided to apply and what you've learned through your experience. Each visitor will sign in and provide contact information so that World Headquarters can send additional details regarding leadership roles and opportunities after the convention is over.

Region Gatherings

Contact your international director or director candidates to coordinate the region gatherings. World Headquarters is not involved in the organization of this event. 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.

Toastmasters International World Championship of Public Speaking®

Watch as the top finalists compete for the title of World Champion of Public Speaking®. A seat will be reserved for you and one guest.

President's Inauguration, Reception and Celebration

The Past International President presides over the induction of newly elected officers and directors. This elegant celebration marks the close of the convention. A seat will be reserved for you and one guest at the President's Inauguration.

SEPTEMBER 1–JUNE 30

SEPTEMBER

- Continue approved district visits.
- World Headquarters will post the approved district visit schedule to the Meeting Room. Be sure to communicate approvals to the districts with approved visits.
- Submit region advisor applicant and Board of Directors candidate recommendations to World Headquarters.
- District Success Plans are due to World Headquarters by September 30.

OCTOBER

- Continue approved district visits.
- Toastmasters International will announce Mid-year Training expectations.
- World Headquarters will distribute to you directly the District Success Plans for each of your districts. Be sure to review.

NOVEMBER

MID-YEAR TRAINING WEBINARS

- Continue approved district visits.
- From November–January, you will participate in webinar training once or twice a week for approximately six weeks to prepare for Mid-year Training. Review facilitator and participant materials in advance of each webinar. Practice assigned sessions individually and during group webinars, adding your personal experiences in Toastmasters to make the training more engaging. Ask questions and provide feedback on session content to ensure the best possible learning experience for district leaders.

DECEMBER

- Continue approved district visits.
- Attend Mid-year Training webinars and practice sessions.

JANUARY

- Continue approved district visits.
- Attend Mid-year Training webinars and practice sessions.
- Facilitate Mid-year Training.
- Limit corporate visits for the remainder of the program year.

FEBRUARY-MARCH

LEADERSHIP DEVELOPMENT, SHADOWING AND SUCCESSION PLANNING

- Continue to provide district leaders with opportunities for development. Teaching them how to meet district goals and how to resolve conflict for example, will give them the skills necessary for continued success. You can also do this as you work through the District Success Plan and during the monthly calls. Be open about your desire to help identify the level of leadership each leader desires to reach.
- Continue approved district visits.
- Prepare to train your successor.
- Keep districts focused on achievement in the District Recognition Program.

APRIL-JUNE

- Continue approved district visits.
- Work on transition training with your successor.
- Keep districts focused on achievement in the District Recognition Program.
- Discuss with the district leaders, best practices for transition.
- District leaders will receive the year-end survey on region advisor performance. Region advisors receive results soon after.

CRITICAL INFORMATION

TRAVEL

World Headquarters reimburses region advisors for travel expenses to August District Leader Training, January Mid-year Training and approved district visits. As a region advisor, it is important for you to know **Policy and Protocol, Protocol 10.0: Region Advisors, 1. Region Advisor Expenses**. You will be reimbursed for the following:

- ▶ Lowest rate round-trip airfare and up to \$50/per segment to secure a seat.
- ▶ Public transportation (coach or discount) or mileage at the current business standard mileage rate in effect for federal income tax purposes by the United States Internal Revenue Service, by the most direct route. Mileage reimbursements require documentation that includes the travel date, distance traveled and travel purpose.
- ▶ Other public transportation, shuttle, taxi or mileage to and from the RA's home and to and from the passenger terminal to the event up to \$50 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 for each day that event attendance is required.

When traveling 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.

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 during Toastmasters Leadership Institutes, district trainings or district executive committee meetings when not held during a district conference.

Region advisors are allowed one visit per district unless a special circumstance applies. All visits must be pre-approved by the International President and World Headquarters. The region advisor coordinates all district visit plans directly with the district leaders. It is best to schedule district visits at least three months apart from an international officer or director visit.

REGION ADVISOR VISITS FROM JULY-DECEMBER

Prime months for region advisor visits are July-December, but visits in December are rare. This is a time when region advisors can help district leaders transition into their new roles, plan for the year, develop skills in marketing and goal planning, and train other district officers.

Collaborate with your predecessor to identify the districts he or she thinks you should visit during the first half of the program year. Work with district leaders to determine if a visit is necessary or desired. Aim to schedule more corporate visits in the first half of the year, as your focus will shift during the latter part of the year.

REGION ADVISOR VISITS FROM JANUARY–JUNE

Region advisor visits in January are rare because of Mid-year Training. From February–June, continue providing support for the districts. However, you should increase your focus on teaching district leaders how to train their officers and further support the District Recognition Program efforts.

REGION ADVISOR CORPORATE VISITS

Region advisors support districts by participating in corporate club-building visits from July–December. These visits should be 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 CGD or club-building team schedules corporate visits to coincide with your visit. Work with the team in advance to ensure they are confident with the cycle of successfully identifying leads, conducting cold calls and visits, and chartering and maintaining strong relationships with corporate clubs. If they need assistance with this process, you can teach them the skills necessary for success.

The CGD or club-building team should lead the corporate visit while the region advisor provides performance feedback and evaluation. This will empower the district leaders to confidently continue club-building efforts long after the region advisor has gone home.

It's a good idea for each division in a district to have a demonstration team and team leader ready to respond to demonstration visit requests.

INTERNATIONAL OFFICER AND DIRECTOR VISITS

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

District leaders and World Headquarters staff work together to coordinate visits. A district must accept a visit from an international officer or director. Once a district accepts a visit, World Headquarters, the visiting dignitary and district leaders have a conference call to discuss plans for the visit. District leaders are asked to schedule club-building opportunities, media events and corporate recognition visits to ensure the district visit is a success.

CORPORATE RECOGNITION VISITS

A corporate recognition visit is a meeting between an international officer or director, experienced district leader and high-ranking official of a corporation with an existing club. The purpose of this visit is to provide tangible recognition of Toastmasters International's appreciation of the organization's support.

DISTRICT VISIT PROCESS

PRIOR TO THE VISIT

1. Get familiar with the district by reviewing the District Success Plan, district assessment, district performance reports and past district visit reports.
2. Contact the district to suggest a visit between July–December if possible. Be aware that many of these leaders may not fully understand the evolving role of region advisors. This is an opportunity to explain the region advisor role and how they 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. Determine with the district leaders if a visit is necessary. If so, ensure they understand the district visit request process.

District Visit Requests

World Headquarters will send you an official district visit request form. After identifying the district’s needs, please complete the form and submit to regionadvisor@toastmasters.org.

The region advisor requests are coordinated with the international director visit schedule to ensure no scheduling conflicts occur. The International President reviews and approves all district visit schedules.

When you receive a response from World Headquarters, let the district leaders know if the request was approved or not. If so, continue to work with the district leaders on planning efforts. Please do not make travel arrangements until you receive district visit approval. At that time you can make arrangements at least 21 days in advance of the visit date to get the best rates.

Develop the Agenda

As a region advisor, it’s your responsibility to set the expectations and work with the district to prepare a full agenda before your visit. Schedule a telephone or video chat with the leaders to discuss the details. This includes ensuring they understand the club-building cycle and have scheduled at least three corporate visits.

Make sure the agenda includes activities such as:

- ▶ Providing marketing support and expertise expand the districts’ capacity to grow clubs and membership.
- ▶ Training and coaching the CGD and the club-building team, if the district has one, on how to:
 - Schedule and maximize corporate visits. Ensure that at least three corporate visits 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 CGD 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 with any concerns the district leaders have.
- ▶ 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 Toastmasters Leadership Institute, if possible.

Contact the district 2–3 weeks before the visit to confirm travel plans, agenda and any last-minute changes.

RA DISTRICT VISIT KITS

World Headquarters will mail a Region Advisor District Visit Kit to you and the CGD of each district. The kit contains Toastmasters education program materials as well as marketing and membership resources. After reviewing the contents in the kit, decide which materials will benefit the leaders based on the needs identified in the District Success Plan. 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.

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.

It's a good idea to request a debrief at the end of each visit. Be sure to discuss next steps and determine responsibility for certain action items identified during the visit.

AFTER THE VISIT

- ▶ Convey your appreciation for the district leader's time. Best practice is to send an email or mail a "Thank you" note to each district leader that helped create a successful visit.
- ▶ Respond to any remaining queries.

Within 30 days after a district visit, submit the following to World Headquarters at regionadvisor@toastmasters.org:

- ▶ **District Visit Report:** You can complete this report with the district leaders during the debrief or by yourself after the visit. 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 concern.

- The report will be posted to the region library in the Meeting Room 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 typically 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.
- ▶ **Expense Reimbursement:** Toastmasters International will reimburse expenses according to **Policy and Protocol, Protocol 10.0: Region Advisors, 1. Region Advisor Expenses**. You will be trained on how to use an online tool 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!

RESOURCES

Distinguished Performance Reports

District Recognition Program

District Visit Brochure

District Visits

International Officer, International Director and Region Advisor Responsibilities

FREQUENTLY ASKED QUESTIONS

Is a region advisor allowed to participate in a district leadership role while serving as a region advisor?

A region advisor may not campaign for, be elected to, or be appointed to any district office or role while serving as a region advisor. See **Policy and Protocol, Policy 10.0: Region Advisors: 4. Terms of Service**

Is a region advisor allowed to endorse or campaign on behalf of an international officer or director?

A region advisor may not endorse or campaign on behalf of an international officer or director candidate while serving as a region advisor.

When are region advisors allowed to announce their candidacy for international officer or director?

Announcements may be made one year after the region advisor's term has finished. An RA may not stand for election at the Annual Business Meeting in the same year in which their RA term ends.

Can region advisors serve on nominating committees?

Region advisors may not serve on a District Leadership Committee or the International Leadership Committee. However, region advisor applicants can serve, but if appointed, must immediately resign and find a replacement. See **Policy and Protocol, Protocol 9.0: District Campaigns and Elections and Policy 9.1: International Campaigns and Elections**

Can region advisors help districts complete the District Success Plans?

Yes, they can. Region advisors guide and serve as resources for district leaders as they complete their District Success Plans.

Can region advisors visit existing clubs?

No. It is best for region advisors to make club-building visits the priority.

What expenses incurred as a region advisor will be reimbursed by Toastmasters International?

It is important for all region advisors to read and understand **Policy and Protocol, Protocol 10.0: Region Advisors, 1. Region Advisor Expenses**

RESOURCES

Policy 9.1: International Campaigns and Elections

Policy 10.0: Region Advisors, 4. Terms of Service

Protocol 9.0: District Campaigns and Elections

Protocol 10.0: Region Advisors, 1. Region Advisor Expenses

NOTES

NOTES