

Region Advisor Handbook





**Thank you to the following
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with the updated version of
this handbook.**

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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

We match our actions with our words, demonstrate honesty and trustworthiness, communicate with sincerity and thoughtfulness, have the courage to acknowledge our mistakes, and always strive to do the right thing.

Service

We strive to provide high-value, exceptional support by being responsive, attentive, and passionate in fulfilling our duties as individuals and as an organization to all.

Excellence

We consistently strive to meet or exceed expectations by upholding the Toastmasters Promise, nurturing a collaborative environment, innovating to deliver creative solutions, and optimizing quality to produce superior service.

Respect

We treat all with dignity, welcome diverse perspectives, acknowledge all contributions, believe that all have positive intent, practice mutual accountability, and critique but never demean service.

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

Toastmasters International Envisioned Future

Toastmasters is a thriving and diverse global community. We enhance the personal lives and careers of individuals, enabling them to positively impact their communities. We empower people to develop communication and leadership skills through a welcoming, high-quality, experiential learning environment, resulting in greater self-confidence and personal growth.

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. One Region Advisor is appointed to every Toastmasters International region with eight or fewer Districts. Two Region Advisors are appointed to every Toastmasters International region with nine or more Districts. The Board of Directors may approve the appointment of an additional Region Advisor for any region 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 challenges and opportunities for Region Advisors. You have the unique opportunity to make a significant impact on the individuals you support and ultimately influence the success of the Districts you support. Your challenge is to assess and provide the type of assistance and support each leader needs. As a Region Advisor you will spend approximately 50 hours a month in your role. However, actual engagement will depend on the situation of each 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, or as directed by the International President.
- ▶ Participate fully in all District Leader Training preparation sessions conducted by the World Headquarters Training Team for any training to be facilitated by the 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 as 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 and assist Districts in the creation of brand- and trademark- appropriate materials. Review **Policy 4.0: Intellectual Property**.
- ▶ 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 and 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 the 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:
 - The Region Advisor Monthly Report (due on the fifth 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

District Strategies guide

Policy 10.0: Region Advisors

Protocol 10.0: Region Advisors Expenses

Protocol 10.1: Region Advisor Visits

Need Help?

Check out our frequently asked questions available on the Toastmasters International website: toastmasters.org/FAQ. In addition, you may contact World Headquarters for assistance with any questions or concerns: toastmasters.org/About/Contact-Us.

Onboarding and Transition

What an exciting time! For the first three months of your term, April–June, 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 in 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

Starting in April, the newly appointed Region Advisors and their predecessors must attend a transition call with World Headquarters staff. The purpose of this call is to discuss the transition of responsibilities and expectations from April through June. 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 District leader monthly peer calls, as well as transition webinars designed to help them succeed in their role. The incoming Region Advisor's role during these calls is to introduce themselves to the District leaders and observe how the calls are conducted by the current Region Advisor.

The outgoing Region Advisors will form transition committees, selecting topics that will be beneficial in training the incoming Region Advisors.

Microsoft Teams

Toastmasters International communicates with Region Advisors through a centralized communication platform called Microsoft Teams. You will receive instructions from

the Region Advisor Program Team on how to use this tool; however, here are a few of the best practices while using the platform:

- ▶ Use Microsoft Teams to keep up to date on announcements, queries, news, updates, events, and training. Post questions, helpful tips, or other information that will be useful to the respective community.
- ▶ World Headquarters will communicate organizational updates through Microsoft Teams.
- ▶ All resources—files, folders, training materials, and even video recordings of the various sessions—are stored here for reference/download at any time.
- ▶ 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.

Transitioning 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 each District’s dynamics, history, and needs. You’ll also have the opportunity to observe how your predecessor manages their monthly District leader peer group calls.

During the transition period, your predecessor is the primary Region Advisor contact for all your assigned 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 the predecessor’s advice. Please be mindful of allowing your predecessor to support and serve the current District Leadership Teams through June 30, while you begin to support the newly elected District leaders in preparation for their term starting July 1. See **Making Initial Contact With New District Leaders** section for more information to get started.

After the transition call with World Headquarters, connect with your predecessor for an overview of the following. A comprehensive Transition Guide is also available in the Region Advisor Microsoft Teams Channel.

- ▶ Challenges, successes, and best practices for your assigned Districts.
- ▶ Review the Districts’ Success Plans 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 Training and Mid-year Training.
- ▶ Review the District visit process in preparation for the visit.
- ▶ Discuss and agree on how your predecessor will introduce you to the District teams.
- ▶ Strategize with your predecessor about introducing and encouraging District Directors to invite you for a District visit, ideally sometime in July, August, or September.
- ▶ Monthly peer calls with District leaders.
- ▶ Any other reports/resources that might be helpful. This includes:
 - Region Advisor Monthly Report (Reports for the previous month are due on the fifth of each month. For example, November reports are due by December 5).
 - District Visit reports (due within 30 days after the visit).
 - Expense Reimbursements (due within 30 days after incurring the expense).

Remember, after the current term is over—June 30—your predecessor may be limited in providing support.

Training Provided by World Headquarters

In addition to providing 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 in these calls. If you cannot attend, make sure to inform World Headquarters well in advance and watch the recording afterwards.

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

International President

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

International Directors

International Directors are Officers of the organization 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 peer group 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 to discuss the status of the Districts from the International Director's perspective. Consider offering a standing invitation to your monthly District leader peer group calls (in addition to the quarterly invitation as requested by the International President). Attending monthly peer group calls is up to the International Director. If they attend, set aside a few minutes during each peer group 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, or as needed, one-on-one calls 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 leaders, and in working collaboratively and collectively toward fulfilling the District mission. Remember to serve as a supportive and encouraging mentor, rather than directing or dictating. Share best practices to help them overcome challenges.

District Director

By working with you, the District Director can benefit from your experience. 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***.

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**, and the financial tools available in District Central on **toastmasters.org**.

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, organizing speech contests, promoting the Distinguished Club Program, emphasizing the 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 that exceed members' expectations will enhance membership and members' satisfaction.

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

Club Growth Director

As the District leader who is responsible for club growth, retention, and individual membership growth, the Club Growth Director will benefit from your marketing expertise. The Club Growth Director is responsible for developing 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 Building

The ***Club Building Strategy Guide for Districts*** will help you become familiar with roles and responsibilities and provide guidance and support to the District's club building team. Please read and encourage the Club Growth Directors to read and refer to this guide often throughout 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 with achieving Distinguished recognition.

The ***Distinguished Club Program*** and the ***Club Success Plan*** serve 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.

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**.

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 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 at **districts@toastmasters.org** for assistance, and copy **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 a 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 a skill that can be learned. Review the ***Communication and Conflict*** 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, WhatsApp, Microsoft Teams, etc.
- ▶ 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**.

Resources

District Leadership Handbook

District Strategies Guide

Club Building Strategy Guide for Districts

Club Sponsor, Mentor, and Coach Training Materials

District Recognition Program

Distinguished Club Program

Club Success Plan

Public Relations Resources

District Finance

Communication and Conflict

District Success Plan

Policy and Protocol 3.0: Ethics and Conduct

Policy Violations Quick Reference Guide

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. Region Advisors rotate moderator, scribe, opening thought, and online meeting platform tech responsibilities each month. The International President and World Headquarters staff may be on the call to provide updates as well. Make every effort to join these calls as the information learned will prove valuable to District leaders.

Monthly District Leader Peer Group Calls

Region Advisors are expected to have monthly peer group calls with their District leaders. The purpose of these calls is for District leaders to share best practices, marketing ideas, challenges, solutions, and successes. Also, utilize District leader calls to teach timely and critical topics, and to refocus leaders on the District mission.

The most effective practice is to hold monthly peer group calls consistently. Calls may be held in a variety of ways, including:

- ▶ A District team all together ("Trio," "Top 3," "Quad," etc.), including the District Director, Program Quality Director, Club Growth Director, District Public Relations Manager, and other District leaders as needed or appropriate.
- ▶ Peer group calls: Include all the region's District Directors on one call; then have a separate peer group call for each of the other leader roles (Program Quality Directors, Club Growth Directors, and District Public Relations Managers).
- ▶ One-on-one calls initiated by the RA or a District leader upon request.
- ▶ Weekly Region Advisor open office hours (no appointment needed).

Making Initial Contact With New District Leaders

In May or June, Region Advisors will receive contact information for the newly elected District leaders from World Headquarters as soon as Districts provide new leader updates. Before contacting the leaders, the best practice is to meet with the outgoing Region Advisor to learn region-specific information, updates, perspectives, and best practices learned and used during their term, as well as to review current and historical data and plans. Other historical reports will be provided by the Region Advisor Program Coordinator.

After coordinating with the outgoing Region Advisor, incoming Region Advisors can send an email or call each incoming District leader individually (be sure to wait until all District elections are held, and results or appointments are final). Contact the incoming District Director first as a courtesy. This is an opportunity to build relationships and rapport and offer support.

Introductory communication objectives are:

- ▶ A self-introduction as the incoming Region Advisor (attach Region Advisor Bio one-page document too).
- ▶ Congratulate the newly elected (or appointed) District leader.
- ▶ Provide a few specific examples of how the Region Advisor can assist with their efforts to fulfill the District mission.
- ▶ Schedule the District leader orientation session in June. In addition to monthly peer group calls in July and August, consider setting up a couple peer group calls with the incoming team before August District Leader Training. Also, it can be beneficial to schedule a short, face-to-face meeting with new leaders during August District Leader Training or the International Convention, to continue building rapport.

Planning Monthly District Leader Peer Group Calls

Monthly District leader peer group calls are to be held on an online meeting platform account, as determined by World Headquarters. The account will be assigned to each Region Advisor at the start of the term. Instructions on how to use this service will be provided by the Region Advisor Program Coordinator.

World Headquarters will provide agenda guidelines and a list of suggested discussion topics to use as talking points for planning District leader calls. Also, World Headquarters will provide a list of subject matter experts to consider as guest contributors to calls. And International Directors are to be invited at least once per quarter, or as otherwise directed.

Plan to communicate with District leaders at least once a month, beginning in July, to create an environment of teamwork and support. The incoming Region Advisor usually participates in pre-July peer group calls at the invitation of the outgoing Region Advisor. Beginning in July, calls are scheduled and led by the incoming Region Advisor. Schedule the peer group calls in advance for the year, so District leaders can plan to attend regularly. Consider surveying the leaders to find the ideal meeting schedule, or decide and announce self-determined dates, with willingness to adjust as needed. A best practice is to send an online meeting invite to the leaders well in advance, complete with meeting details and link, as well as a shared document listing all calls and call details.

Some Region Advisors hold a conference call every week on the same night, and others hold all calls over one week of the month. In the end, the peer group call schedule is up to the Region Advisors, in coordination with District leaders.

To support the incoming Region Advisor, some Region Advisors ask another Region Advisor or Past Region Advisor to attend initial calls to act as a silent observer, to gain feedback on both facilitation and discussion. In addition, consider inviting a Past Region Advisor as a mentor. A list of Past Region Advisors who are available to mentor current Region Advisors is made available by World Headquarters.

Once all monthly peer group call dates are finalized, provide this information to the Region Advisor Program Coordinator at regionadvisor@toastmasters.org for the master calendar.

Hosting Your First Monthly District Leader Call

When hosting the 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. Consider creating “call agreements” like speaking time limits, listening practices, sharing time, agenda parts, muting, etc.

The first few months of the term are very busy and can be stressful for all leaders, so offer immediate assistance, especially for the incoming Club Growth Director. Work closely with them to transition with the outgoing Club Growth Director.

Timely agenda items (also see guided discussion topics) for the July, August, and September peer group calls include:

- ▶ The District Success Plan, marketing and communications plans, and the District budget
- ▶ District calendar and World Headquarters deadlines for various reports, lists, and the budget
- ▶ August District Leader Training

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 this tool to use beginning in July.

Region Advisor Monthly Report

The Region Advisor Monthly Report is for Region Advisors to evaluate District Leadership Teams' success metrics, processes, and District performance progress. The information will be provided directly to the International President monthly. 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, guidance, 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 Advisor District visits are approved by the International President. It is the Region Advisor's responsibility to work with District leaders to plan for and schedule visits. Districts must accept visits by a Region Advisor. No travel or online arrangements can be made without prior approval. Once approved, you must plan at least 21 days in advance of the onsite 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 needs 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 the annual District conference time frame.

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.

The Region Advisor works with the Club Growth Director and/or club-building team to schedule three or more club-building events, such as appointments, cold calls, summits, and/or open houses, to coincide with your visit. This includes events at corporations, universities, government agencies, associations, nonprofit organizations, and communities. Please note these types of appointments may also be conducted online via Zoom, 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 onsite), and chartering and maintaining strong relationships with local corporations and groups. Preparation is key to ensuring a successful visit. 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 the District Director, Club Growth Director, and club-building team are communicating with each other in coordinating corporate and community 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 \$75 USD each segment. Alternately, up to \$150 USD for parking at the passenger terminal per trip.
- ▶ Hotel accommodations, including applicable taxes, for the number of nights required for attendance at training events and other pre-approved events. Incidental expenses and all additional nights' lodging are the responsibility of the RA.
- ▶ A meal reimbursement of up to \$50 USD per day (with receipts) for each day that event attendance onsite is required, and Toastmasters International or a Toastmasters District does not provide meals. There is no reimbursement on days when three meals are provided.
- ▶ 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

District Visits

District Visit Brochure

International Officer, International Director, and Region Advisor Responsibilities

Protocol 10.0: Region Advisors Expenses

Protocol 10.1: Region Advisor Visits

District Visit Process



Prior to the Visit

1. Become familiar with the District by reviewing their District Success Plan, District performance reports, and past District Visit Reports.
2. Contact the District to explain the role of the Region Advisor and how District leaders will benefit from working with you. While identifying the District's needs and goals, suggest a visit between July and October. It is the Region Advisor's responsibility to recommend a visit for each of the District's they serve. Then, working in conjunction with the District leaders, the Region Advisor and the leaders will plan and schedule the visit.
3. Based on your assessment through conversations with your District leaders, your predecessor, and reviewing important documents, you may determine a visit may not be necessary. If a visit is requested, ensure they understand the District visit process and that the District must accept a visit.

Types of Visits

There are two types of visits: a single activity (e.g. corporate visit, COT, additional trainings) and a comprehensive visit (multiple activities over multiple days). It is very unlikely that you would receive approval for an onsite visit composed of only a single activity.

District Visit Requests

You will receive training regarding the District visit process and World Headquarters will provide an official District visit request document. At least four weeks prior, please complete the form and submit to **regionadvisor@toastmasters.org**.

The International President will review all District visit schedules and notify World Headquarters if your request is 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** to start the process. 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 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 their 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.
- ▶ Discussing how to identify future leaders and create 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.
- ▶ Scheduling a debrief at the end of each visit and defining 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 digital **Club Building Kits** via email 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 to be shared with the lead.

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 online 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 is 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**:
 - ▶ **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 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 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 facilitate these events, as assigned by the World Headquarters Training Team. The first, District Leader Training, is held before the International Convention in August. Mid-year Training is held throughout the month of January, with smaller groups of regions being trained together.

Region Advisors' participation is essential to the success of District Leader Training. The World Headquarters Training Team will work with you to prepare for the training sessions you will be facilitating.

Additionally, Region Advisors will facilitate District Leader Orientation at the beginning of the District leader term. District Leader Orientation is an online learning opportunity that reviews fundamental role responsibilities for District Directors, Program Quality Directors, and Club Growth Directors.

District Leader Training Preparation

The World Headquarters Training Team will notify you via Microsoft Teams to participate in the online meetings that will prepare you to facilitate District Leader Training.

You are required to participate in online preparation meetings 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 online meeting, make sure to review the appropriate facilitator and participant materials, which will be located in Microsoft Teams. Rehearsing your facilitation 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 rehearsal sessions, incorporating your personal experiences and Toastmasters knowledge 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 are also encouraged to practice with other Region Advisors. As you prepare to facilitate your assigned sessions, don't

forget to ask for feedback.

Attend Final Preparation Session

To complete final preparations for August District Leader Training, all Region Advisors attend an onsite final day of preparation. This includes participating in rehearsals, reviewing logistics, and addressing any outstanding questions. Take this opportunity to increase your presentation confidence, practice effective facilitator skills, familiarize yourself with the room setup, and ensure you make a good first impression on 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 the 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. (Note: Toastmasters International does not cover hotel or other expenses for the remainder of the convention.) 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, International Director/Officer, and District leader roles. You may be asked to volunteer at the booth to promote the Region Advisor role and program, answer any questions members may have, and share your own experience with them.

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 your 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 have any special needs or questions regarding the convention venue, please contact the Toastmasters International Meeting Planning Team at meetingplanning@toastmasters.org.

President's Inauguration

The Immediate Past International President presides over the induction of newly elected International Officers and Directors.

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), which is responsible for reviewing topics as assigned by the Executive Committee to continually enhance the Region Advisor Program.

Additionally, there is the Region Advisor Mentor Program. This is a great opportunity to continue serving by being 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"> ▶ Participate in Region Advisor welcome and orientation call with World Headquarters and the International President. ▶ Participate in transition calls with predecessors and World Headquarters. ▶ Begin transition training with predecessor. ▶ Participate in monthly Region Advisor peer group call with District leaders. ▶ Participate in monthly Region Advisor conference call. ▶ Review instructions from WHQ regarding Microsoft Teams. ▶ Review Region Advisor e-toolkit from WHQ. ▶ Participate in Meet and Greet meeting with World Headquarters Training Team. 	<ul style="list-style-type: none"> ▶ 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. ▶ Review District visit process instructions from WHQ. ▶ Develop Region Advisor visit plan with incoming District leaders. ▶ Participate in transition calls with predecessors and World Headquarters. ▶ Participate in monthly Region Advisor peer group call with District leaders. ▶ Make initial contact with newly elected District leaders. ▶ Participate in monthly Region Advisor conference call. ▶ Register for August District Leader Training and the International Convention. ▶ Review conference call account information for your District leader calls. ▶ Continue transition training with predecessor. ▶ Receive business cards and name badge. 	<ul style="list-style-type: none"> ▶ Participate in transition calls with predecessors and World Headquarters. ▶ Participate in monthly Region Advisor peer group call with District leaders. ▶ Participate in monthly Region Advisor conference call and continue for the year. ▶ Receive expectations from Toastmasters International about District Leader Training. ▶ Conduct District Leader Orientation for incoming District Directors, Program Quality Directors, and Club Growth Directors. ▶ Attend District Leader Training online preparation meetings. ▶ Continue to make initial contact with newly-elected District leaders. ▶ Continue developing the District visit plan with incoming District leaders. ▶ Submit District visit requests. ▶ Continue transition training with predecessor. ▶ Outgoing Region Advisors complete year-end self-assessment.

Calendar-at-a-Glance

The following pages are best practices for fulfilling your responsibilities.

July	August	September
<ul style="list-style-type: none">▶ Attend preparation meetings for District Leader Training.▶ Begin District visits.▶ Review year-end Distinguished District results.▶ Host your first monthly Region Advisor peer group call with District leaders and continue for the year.	<ul style="list-style-type: none">▶ Complete visit as approved.▶ Attend preparation meetings for District Leader Training.▶ Attend onsite District Leader Training final preparation sessions.▶ Facilitate District Leader Training.▶ Attend the International Convention.▶ Contact the International Director for your region.	<ul style="list-style-type: none">▶ Complete visit as approved.▶ Receive Mid-year Training dates and locations.▶ Submit Region Advisor applicant recommendations to WHQ.▶ Submit Board of Directors candidate recommendations to WHQ.

Calendar-at-a-Glance

The following pages are best practices for fulfilling your responsibilities.

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

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** (Note: The RA must be logged in to access this link.) provides guidance for communicating and implementing the Toastmasters International Brand.
- ▶ A **Trademark Use Request** (Note: The RA must be logged in to access this link.) 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.

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**.

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

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"> ▶ 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. ▶ Incoming RAs should be added as administrators during the April–June transition period. ▶ Outgoing RAs are to hand over administration controls of the sites to the incoming RAs by the end of June. ▶ RAs may appoint members of the region to act as administrators. The administrators are not there to draw attention to themselves. ▶ 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. ▶ It is essential that inappropriate posts be removed as soon as possible. ▶ Decide who can join your region's page/group.
Continuity	<ul style="list-style-type: none"> ▶ 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, or if a group/site is unexpectedly deleted. ▶ Approach the administrators of unused/obsolete sites and ask for them to be archived.
Teamwork between RAs	<ul style="list-style-type: none"> ▶ 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. ▶ It is essential that the RAs are seen to be working together and not to be competing with one another.
Social media posts during District visits	<ul style="list-style-type: none"> ▶ Posts should celebrate achievements of the District being visited. ▶ Posts may celebrate efforts of District leaders. ▶ Posts may highlight key events (e.g., corporate visits), as long as the organization gives permission to do so. ▶ During District visits, social media posts should focus on the work of the RA, rather than social events surrounding the visit.

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, 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 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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