

TOASTMASTERS INTERNATIONAL

DISTRICT 35

PROCEDURE MANUAL

REVISED
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Foreword

Three years post pandemic, technology has completely transformed the way all aspects of our Toastmasters journey are conducted, such as our Club Meetings, Speech Contests, and Business Meetings. It became apparent to our Trio Team—Program Quality Director Jason Feucht, Club Growth Director Robert Wall, and me—that the District 35 procedural manual was due for an update. The previous version was updated in March 2019; however it did not reflect our new environment, including how our District business operations are conducted.

Past District Director Ed Thelen graciously agreed to lead the team that included Immediate Past District Director Teri McGregor and Past District Director Kris Pool to review and recommend changes to the District 35 Procedures Manual. Ed was the perfect choice for the job given; he had been involved in the previous update of the Procedures Manual during his tenure as District 35 Director.

This new version considers the three different ways that we can conduct business: in-person, virtual, and hybrid. As technology evolves, this procedural manual will also continue to evolve.

Toastmasters International's Governing Documents will continue to be the main point of reference for our District. The purpose of this District 35 Procedures Manual is to document some of our district's traditions and best practices. Because Districts cannot formulate any policies, this document's sole purpose is to "fill in the gaps" on how we execute some of our procedures at the local level. It is meant to be a living document that is reviewed periodically and revised when necessary.

Many thanks to Ed Thelen, Teri McGregor, and Kris Pool for their work on this edition of the District 35 Procedures Manual. As our District celebrates our Platinum Anniversary, we continue to reflect, rejoice, and remember our accomplishments and the traditions that we have held on to as we move forward with confidence and a sense of commitment to the years and decades ahead.

Jennifer Kibicho, DTM, PhD, CPA (Kenya)
District Director 2022-2023
April 2023

Introduction

This manual will outline the Office and Committee organizations and District Procedures. It serves as a guide to District Leaders and Committees, but in no way overrides Toastmasters International Governing Documents (below).

This manual takes precedence over all previous versions, most recently **April 2019**.

Throughout this document there are references to certain external documents. The following documents are located on the [Toastmasters International website](#).

[Governing Documents](#) of Toastmasters International which include:

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

[Toastmasters International District Finance](#)

- Chart of Accounts, Managing District Finances – A Guide for District Leaders

[District Leadership Handbook](#)

NOTE: the links for the various documents are current as of the approval of this Procedures Manual. Links may change over time to more current versions and may not be reflected in this Procedures Manual. Always refer to the documents posted on the Toastmasters International website.

Acronyms

Below is a listing of general acronyms used throughout this procedure manual. This is not an all-inclusive list.

- DD – District Director
- PQD – Program Quality Director
- CGD – Club Growth Director
- PRM – Public Relations Manager
- AM – Administrative Manager
- FM – Finance Manager
- DivD – Division Director
- AD – Area Director
- DEC – District Executive Committee
- SAA – Sergeant at Arms
- District – Toastmasters International District 35

Parliamentarian

A. General

The Parliamentarian acts as the procedural aid to the District Director, the District Executive Committee, and the District Council when in session or meeting. The Parliamentarian serves as guardian of the rights and privileges of members of Toastmasters as outlined in the District Administrative Bylaws and the Toastmasters International Constitution and Bylaws.

B. Qualifications

The Parliamentarian is appointed by the District Director and may be re-appointed for any number of terms. The Parliamentarian shall have an intimate working knowledge of Roberts Rules of Order and proper parliamentary procedure. The Parliamentarian shall have full knowledge of the Club Constitution and Bylaws, District Administrative Bylaws, and Toastmasters International Constitution and Bylaws.

C. Scope of Duties and Responsibilities

1. Assist the District Director or other presiding officer in conducting District Executive Committee and District Council meetings or any other special meetings in accordance with:
 - a. Roberts Rules of Order
 - b. Toastmasters International Bylaws
 - c. District Administrative Bylaws
2. Interpret disputes on points of order, privilege, and procedural matters.
3. Advise on proper phrasing of motions and amendments.
4. Advise assemblies on the proper handling of business matters.
5. Assist Clubs, Areas, and Divisions with their parliamentary problems, as requested or as directed by the District Director.
6. Present parliamentary procedure training for officer training programs when requested by the District Director, Program Quality Director, or Club Growth Director.

D. Communications

Provide the necessary communications for the proper functioning of the office, as requested by the District Director.

E. Accountability

1. District Director
2. District Executive Committee – when in session
3. District Council – when in session

Logistics Manager

A. General

The District Director may appoint a Logistics Manager, subject to approval by the Executive Committee, and is eligible to be re-appointed for any number of terms.

The Logistics Manager acts as the official custodian of district properties. The Logistics Manager may actively take part in meetings of the District Executive Committee and District Council but shall not have a vote in accordance with the Bylaws of Toastmasters International and District Administrative Bylaws.

This role was formerly referred to as District Sergeant at Arms or District Master Host.

B. Scope of Duties and Responsibilities

1. Custody and maintenance of district properties.
2. Inventory all district properties at the beginning of the term and submit a written report to the District Executive Committee.
3. Upon completion of the term, all properties shall be turned over to the succeeding Logistics Manager.
4. Make physical, virtual, or hybrid arrangements for meetings as directed by the District Director.
5. Serve as the Sergeant at Arms at meetings of the District Council.
6. Serve as the District Protocol Chair if appointed by the District Director.
7. Perform any pertinent duties at the direction of the District Director.

C. Accountability

1. District Director

District Speech Contest Chair and Chief Judge

A. General

Toastmasters International has designated the Program Quality Director as responsible for the Speech Contests at all levels of the District. The Program Quality Director will assist and guide division and area officers in establishing program formats and maintaining schedules as outlined in the District Calendar. A District Speech Contest Chair may be appointed by the Program Quality Director and shall be responsible for coordinating the speech contests at the district level. All speech contests in District 35 shall conform to rules published by Toastmasters International.

B. Qualifications

1. The Contest Chair and Chief Judge must be an active Toastmasters in good standing, each for a minimum of two (2) years, having participated or presided at an Area Speech Contest, a Division Speech Contest, and at least one District Convention/Conference.
2. Chief Judges must have completed a minimum of six speech projects in **the *Competent Communicator manual*** or a minimum of two levels in the Toastmasters Pathways learning experience and all other qualifications as outlined in the contest rulebook.

C. Contest Chair Scope of Duties and Responsibilities

1. **Review the Toastmasters International Speech Contest Rulebook (Item 1171) and follow it consistently before, during, and after the contest.**
2. Plan, organize, manage, and evaluate the District speech contest program.
3. Serve on the Conference Committee and have charge of the speech contests at the District level.
4. Ensure that rules and provisions in the Toastmasters Speech Contest Rulebook are complied with at all times.
5. Notify speech contestants of time and place for pre-contest briefing and conduct briefing.
6. Ensure that each speaker is eligible under the contest rules prior to the contest.
7. Arrange for all necessary supplies, materials, and equipment for the District contests.
8. Along with the Program Quality Director, appoint a Toastmaster to perform the duties of "Contest Toastmaster" for each of the district contests.
9. Perform such other functions as assigned by the District Director and Program Quality Director.

D. Chief Judge Scope of Duties and Responsibilities

1. Review the Toastmasters International Speech Contest Rulebook (Item 1171) and follow it consistently **before, during, and after the contest.**
2. Coordinate with the Program Quality Director contest training for all functionaries at the club, area, division, and district levels.
3. Be the district authority on speech contest rules, available to answer questions as they arise.
4. Recruit voting judges, tie-breaking judge, ballot counters, and timers for district contests.
5. Notify voting judges, tie-breaking judge, ballot counters, and timers of time and place for pre-contest briefing and conduct briefing.
6. Assist the Program Quality Director in submitting names of contest winners and alternates to Toastmasters International immediately following the District International Speech Contest.

D. Communications

Conduct such communications as necessary to fulfill the duties of the office, or as directed by the District Director and Program Quality Director.

E. Accountability

1. District Director
2. Program Quality Director

Newsletter Editor

A. General

The Newsletter Editor is the vital link in communicating information to all District members via the District 35 Toastmasters newsletter. The Newsletter Editor may be appointed annually by the District Director.

B. Qualifications

A dedicated Toastmaster in good standing, with experience and knowledge in journalism is preferred. This Toastmaster must have the desire to be of service to every Toastmaster in the district by editing and publishing an informative newsletter.

C. Scope of Duties and Responsibilities

1. Establish a format for publication of the newsletter, preferably electronic.
2. Select and use appropriate software for the production of the newsletter.
3. Submit newsletter to the District Director for approval, then send a copy to the Webmaster for posting on the district website. The editor shall also send a copy to the individual selected by the District Director who shall arrange for notification of the district membership that a new issue has been published.
4. Arrange for necessary material from the District Director, Program Quality Director, and Club Growth Director to convey the policies of the district and Toastmasters International to the district membership.
5. Include news from the Standing Committees and Special Committees.
6. Encourage correspondence from the District, divisions, and areas for articles and club news items.
7. Outline and impress **upon** all correspondents with the importance of getting dates, times, places, and correct names in articles relating to all area, division and club activities.
8. Acquire the necessary assistants for the editing and composition of the newsletter.
9. Maintain a file of newsletters and a complete record of all operations and costs, if any, for the year.
10. Prepare and submit reports to the District Director and District Executive Committee about the district news program.
11. Encourage and promote the submission of news and articles for the newsletter from all District members.
12. Present a final written report to the District Executive Committee and transfer all materials and information to the succeeding newsletter editor at the end of each Toastmaster year.
13. Establish and maintain deadlines as agreed with District Director for:
 - a. Article submission
 - b. Newsletter publication
 - c. Newsletter distribution

D. Communications

Conduct such communications as necessary to effectively perform the duties of the office.

E. Accountability

1. District Director
2. Program Quality Director
3. Club Growth Director
4. **Public Relations Manager**

Webmaster

A. General

The Webmaster is a vital link in communicating information to the District membership via the website. The Webmaster may be appointed annually by the District Director.

B. Qualifications

A dedicated Toastmaster in good standing, with experience and knowledge of website creation and content management.

C. Scope of Duties and Responsibilities

1. Maintain the district website.
2. Keep information on the website current and post information as it is received.
3. Post the district newsletter on the website.
4. Chair the website steering committee, consisting of the District Director, Program Quality Director, Club Growth Director, and Public Relations Manager.
5. Provide a list of website administrators to the newly elected District Director during the month of June for review with updates to this list to be made during the first week of July.

D. Communications

Conduct such communications as necessary to effectively perform the duties of the office.

Material for the district website must be approved by the District Director, Program Quality Director, and/or Club Growth Director.

E. Accountability

1. District Director
2. Program Quality Director
3. Club Growth Director
4. Public Relations Manager

Credentials Committee

A. General

The Credentials Committee shall determine eligibility of voters and determine if there is a quorum at the District Council Meetings. The Credentials Committee shall operate in accordance with Article X: Council Meetings, Quorum, Proxies, and Voting of the District Administrative Bylaws.

B. Membership

1. Parliamentarian
2. Others as appointed by the District Director

C. Qualifications

Any member in good standing, in a club of good standing within the District, may serve on the committee. Members shall not be candidates for office. The District Director shall appoint the Committee Chair and in conjunction with him or her, appoint the other Committee members. Appointments should be made at least sixty (60) days prior to the District Council Meetings.

Candidates for district office have the option to appoint a Toastmaster representative to serve as an auditor of the Credentials Committee.

D. Scope of Duties and Responsibilities

1. Establish operating procedure for the committee prior to the District Council Meetings and based on the instructions for an in-person or virtual District Council Meeting.
2. Establish procedures for validation of credentials prior to the District Council Meetings.
3. Establish a list of eligible voters of the District Council by obtaining the names from the District Administration Manager of members authorized to cast ballots. Executive Committee members must be present to cast their ballot; they cannot assign representatives by proxy.
4. Announce and advise in writing the procedures for validation of credentials to include the current semi-annual membership list and the voting rights of the members at least thirty (30) days prior to District Council Meetings.
5. Provide official ballots to be used at the business meetings by members of the District Council in session.
6. **Prior to conducting business at the District Council Meeting,** announce the official count of the District Council members present; the total number eligible in the district, and whether quorum requirements for the conduct of business have been satisfied.
7. Arrange for a credentials desk and all other such supplies necessary to efficiently conduct the functions of the Credentials Committee, prior to and during the District Council Business Meetings.

E. Communications

Conduct such communications necessary to provide the District Council members the procedures and instructions for the validation of Credentials.

F. Accountability

1. District Director
2. District Council

Past District Directors / Governors Advisory Committee

A. General

The Past District Directors/Governors Advisory Committee shall serve as a source of experience for the District Director and the officers of the District. It may be convened for specific advisory and/or planning purposes concerning a special situation or a non-recurring assignment.

B. Membership/Qualifications

1. Advisory Committee Chair as appointed by the District Director.
2. All past District Directors/Governors in good standing shall be invited to serve on the committee.
3. Administrative Manager shall maintain a list of all eligible members.

C. Scope of Duties and Responsibilities

1. Serve at the will of the District Director when requested.
2. Review and evaluate continuing District procedures and programs, recommend the need for changes, and establish proposal for change to the District Executive Committee.
3. Serve in an advisory capacity on the Standing Committees or as Chair of such committees, as requested by the District Director.
4. Advise specifically on a situation or non-recurring assignment as the District Director may direct or request.
5. Promptly alert the District Director of irregularities in district operations as they arise or are in contradiction with District Procedures or the Governing Documents of Toastmasters International.
6. Informally advise all District officers and act as a source of experience to them, to orient, and develop potential future district officers.
7. Undertake special public relations activity when requested by the District Director.
8. Present club charters when requested by the District Director.
9. Utilize resources of the district, as necessary, to ensure the development of the most effective, advantageous, and progressive programs for the district.
10. Review and evaluate district, division, and area realignment proposals.
11. Advise, recommend, and assist the current administration in formulating operating procedures during its term.
12. Perform such other functions as the District Director may designate.

D. Communications

1. District Director to provide clear written communication to the Advisory Committee and Advisory Committee Chair regarding the specific scope, duration and expected output of the committee.
2. Provide written or oral reports to the District Director as necessary.
3. Conduct communications necessary for the full and proper functioning of committee.

E. Accountability

1. District Director

"T" Award and Committee

A. General

The "T" Award is an honorary award given to an active Toastmaster who is a member in good standing of a club in District 35 who has distinguished themselves over a period of years, contributing significantly in time, work, thoughts, and ideas to improving and advancing the cause of Toastmasters in District 35 for devotion, service, loyalty, and leadership. It is an award for what the recipient has done for Toastmasters in the past, not what could be done in the future.

The award is not necessarily awarded every year.

B. Committee Membership

1. The "T" Award committee is made up of all the past recipients of the "T" Award in good standing.
2. The most recent recipient shall become Chair the year following their award.
3. Proxies sent to the chair by past recipients shall be considered as votes by members present but shall not be counted in the quorum.
4. Administrative Manager shall maintain a list of all eligible members.
5. The quorum shall consist of one third of the eligible members in good standing.

A. Award Qualifications

1. Current elected District Officers and the Immediate Past District Director are not eligible for the award.
2. The award is not made posthumously.
3. No recipient shall be eligible for this award more than once.
4. If the recipient is not able to attend, the award will still be presented.

D. Committee Scope of Duties and Responsibilities

1. The purpose of this Committee is to select a recipient for the "T" Award.
2. Only committee members may make nominations. Any member nominating a Toastmaster for the "T" Award shall provide written documentation at the time of the nomination supporting their choice. This will be for the use of the presenter at the Spring Conference Hall of Fame ceremony.
3. Consider all nominations for the award and either select a recipient or determine that no award is to be presented for the current year.
4. The award vote must be unanimous.
5. The award recipient's name is kept secret until the moment it is announced at the Hall of Fame ceremony during the Spring Conference Banquet.
6. Procure an award which shall be a plaque measuring 12" long and 9" high, and shall have mounted thereon a 10- 1/2" long gavel, a metal laurel wreath 2-1/4" by 3", gold wash finish, and a metal plate 6- 1/2" x 2 1/2" inscribed thereon:

DISTRICT 35 TOASTMASTERS
HONOR
(Name of recipient)
FOR DEVOTION, SERVICE, LOYALTY AND LEADERSHIP
"T" AWARD
(Year) (Date awarded)

7. The cost of the plaque is borne by the district.
8. Request that the moderator of the Hall of Fame ceremony announce the "T" Award last.
9. The most recent recipient, together with the entire committee in attendance, shall present the "T" Award plaque, and extol the accomplishments of the recipient.
10. In the event the recent recipient is absent, then the Chair shall make the presentation.

E. Accountability

1. The T Award Committee for its procedure content, award criteria, and decisions

Alignment Committee

A. General

Once each year, districts must review and amend, if necessary, the alignment of the clubs, areas, and divisions within their boundaries. The result is subject to approval of the district council at its spring meeting. The committee prepares an alignment proposal which is submitted to the District Director and the District Executive Committee at least 30 days prior to the spring district council meeting.

B. Membership

1. Alignment Committee Chair as appointed by the District Director
2. Committee shall consist of former District Officers in good standing (minimum of two), appointed by the District Director

C. Qualifications

Any former district officer in good standing may serve on the committee. Members shall not be candidates for office or district officers. The District Director shall appoint the committee chair, and in conjunction with him or her, shall appoint the other committee members. Appointments should be made at least sixty (60) days prior to the spring District Council meeting.

D. Scope of Duties and Responsibilities

1. Establish an operating procedure for the committee prior to the District Council Meeting.
2. Review current clubs and clubs that have been added or disbanded during the current or previous Toastmaster year.
3. Consult with District Director and Club Growth Director on the potential of club gain and loss.
4. Review the Toastmasters International criteria for number of clubs in an area, and number of areas in a division in Policy and Protocol 7.0 District Structure, 1. Club Assignments and “District Structure – District Alignment” section in the District Leadership Handbook.
5. Review proposed realignment with Division and Area Directors prior to submitting the final recommendation to the District Director.
6. Recommend the realignment of areas and divisions to the District Director at least 30 days prior to the Spring District Council meeting.
7. The Alignment Committee Chair or designee shall present the realignment to the District Council at the District Spring Conference.

D. Communications

Provide the District Director with specific rationale for the recommended realignment of the District.

E. Accountability

1. District Director

Spring Conference Committee

A. General

The Spring Conference Committee, under the direction of the Program Quality Director, is responsible for all local arrangements for the Spring Conference. The Program Quality Director appoints and establishes the Spring Conference Committee. One member of this committee shall be designated and appointed as the Conference Chair, or optionally two persons can be designated as Conference Co-Chairs.

B. Membership

1. Conference Chair(s)
2. Committee Chairs (committee members as needed)
 - a. Budget (works with the District Finance Manager)
 - b. Registration
 - c. Properties/Facilities
 - d. Public relations
 - e. Photographer
 - f. Programs
 - g. Friday night activities
 - h. Other committees as identified by Conference Chair

C. Qualifications

Toastmasters in good standing with the ability to handle the many tasks that arise within the scope of all conference duties. The Conference Chair(s) should have attended several past district conventions/conferences **in order to draw upon prior experience and reference.**

D. Scope of Duties and Responsibilities

1. Local publicity and public relations
2. Make all physical arrangements for facilities, sessions, business meetings, banquets, luncheons, meals, and programs
3. Preparation of promotional materials
4. Coordinate the placement of district properties, as assigned
5. Publication of programs and event schedules
6. Registration and meal ticket sales
7. Set up decorations, including placement of signs for directions
8. Provide assistants to Logistics Manager for business meetings
9. Assist District Credentials Chair with personnel as ballot collectors/counters, if voting will be done in person at the Spring Conference
10. Provide additional services as required and requested by the District Director
11. Note: The District Director and either the Program Quality Director or Club Growth Director must also be signatories on all district accounts

E. Communications

Provide news, information, and photos of the conference to the District Director for purposes of final report and evaluation to the District Executive Committee. Provide news and photos to the local media and district newsletter. Communicate closely with the District Director on the status of committee activities, meal counts, and attendance. Set up any other appropriate items as requested by the District Director.

F. Resources

1. District 35 Conference Planning Guide
2. Recent or past Conference and/or Convention Chairs
3. District Leadership Handbook (Planning a District Conference chapter).

G. Accountability

1. District Director
2. Program Quality Director
3. Finance Manager

Kurzer Prospecting Award

A. General

Jerry Kurzer was a Past District Governor who continually sought to bring new members to Toastmasters. He seemed to always have a membership application with him. He would ask a waitress or anyone he met, "To which Toastmasters Club do you belong?" Of course, if they were not members they would say, "What is Toastmasters?" Jerry would give a short presentation on Toastmasters and would often get new members that way. In the spirit of that Toastmaster outreach, this award has been established to both honor Jerry Kurzer and recognize excellence in membership recruiting.

B. Qualifications /Criteria

1. The award is given to a member who actively promotes Toastmasters by recruiting and sponsoring new members and/or starting new clubs over an extended period of time and a minimum of at least five years. It shall also include consideration for other outstanding recruiting efforts.
2. The award cannot be given to the same person more than once.
3. The award does not have to be made if the selection committee does not feel there is a worthy candidate.
4. The award will be presented at the Saturday banquet before the Hall of Fame ceremony at the Spring Conference.

C. Selection Committee

District Director, Program Quality Director, and Club Growth Director

D. Accountability

1. District Director
2. Program Quality Director
3. Club Growth Director

District 35 Awards

A. General

The top District Awards (District Toastmaster of the Year, Division Director of the Year, and Area Director of the Year) are listed with brief descriptions in the District Recognition section of the District Leadership Handbook. The forms for these three awards are a single document on the Toastmasters International website. Other awards as deemed appropriate by the District Director and the District Executive Committee are listed below.

The Hall of Fame presentation is made at the Saturday banquet during the Spring Conference. The awards include three club awards and five individual awards. The three club awards are Top Club Website, Top Club Social Media, and the Director's Award. The five individual awards are the Area Director of the Year, Division Director of the Year, the Toastmaster of the Year, the "T" Award (if presented), and the top three places in the District International Speech Contest.

B. Qualifications

The District Director, Program Quality Director, and Club Growth Director will determine the qualifications for each of the recognition awards that do not relate to a specific District Officer as indicated in the section below - Plaques for District Officers. The District Director may choose to not present some of the "Other Awards" listed below or add other special awards.

C. Awards Presented by District 35 at Spring Conference

1. Award for District Officers

- a. Director Clock (or plaque if requested)
- b. Program Quality Director plaque
- c. Club Growth Director plaque
- d. Administration Manager plaque
- e. Finance Manager plaque
- f. Public Relations Manager plaque
- g. Division Director plaque
- h. Area Director plaque
- i. Logistics Manager plaque
- j. Conference Chair(s) plaque

2. Top District Awards

- a. Area Director of the Year plaque
- b. Division Director of the Year plaque
- c. Toastmaster of the Year plaque
- d. Three (3) Top Club Website District Dollars and certificates
- e. Three (3) Top Social Media District Dollars and certificates
- f. Director's Award ribbon (see description of this award on page 19)
- g. Speech Contests (for each contest)
 - i. 1st and 2nd place trophies
 - ii. 3rd place certificate

3. Other awards (ribbons, certificates, pins, etc.)

- a. Kurzer Prospecting Award (see description of this award on page 18)
- b. Seven Officers Trained ribbons for clubs with 7 officers trained during summer TLI
- c. Seven Officers Trained ribbons for clubs with 7 officers trained during winter TLI
- d. Seven Officers Trained ribbons for clubs with 7 officers during both summer and winter TLI
- e. Triple Crown pins
- f. Club Ambassador pins (if in effect during the program year)

- g. DTM medallions
- h. Fab Four ribbons (not given to clubs earning Net Five or Elite Eight)
- i. Net Five ribbons (not given to clubs earning Elite Eight)
- j. Elite Eight ribbons

D. Scope of Duties and Responsibilities

1. Determine any changes to which awards will be presented at the convention.
2. Modify previous year's award application forms as needed (e.g. submission information, criteria, etc.).
3. Review criteria for awards not requiring an application form to determine if changes are needed.
4. Prepare order for Toastmasters International for appropriate awards and identify awards (including customized text on plates) that will be purchased locally along with instructions on how that will be done.
5. Distribute application forms, as appropriate.
6. Order awards, as appropriate, and in a timely manner.
7. Determine judges and/or reviewers for appropriate awards (e.g. Top Club awards).
8. Select and identify top club and individual award winners.
9. Receive and verify awards were received as requested.

E. Communications

1. Distribute application forms for those awards that require them. This can be done by email to the membership and notice included on District website and Social Media pages.
2. Provide information on awards to the Hall of Fame committee.

F. Accountability

1. District Director with assistance from Program Quality Director, Club Growth Director, and Immediate Past District Director

Hall of Fame

A. General

A permanent record of achievement has been established and shall be maintained by the Administrative Manager to include the names of those honored along with their accomplishments. The Administrative Manager for maintaining the ongoing Hall of Fame information and have it published on the District website.

B. The Hall of Fame record is divided into the following named sections:

1. Elected Officers
 - a. International Presidents from District 35
 - b. International Directors/Region Advisors from District 35
 - c. President's Distinguished District Governors/Directors
 - d. Select Distinguished District Governors/Directors
 - e. Distinguished District Governors/Directors
 - f. District Governors/Directors
2. District Achievements
 - a. Distinguished District Status
3. Club Achievements
4. Governor's/Director's Award
5. District Top Website
6. District Top Social Media
 - a. District Top Newsletter (former award)
7. Individual Achievements
 - a. International Speech Contest Finalists
 - b. District First Place Speakers International Speech contest (only)
 - c. International Recognition
 - d. President's Citations
 - e. President's Sponsor
 - f. President's Circle
 - g. International Committee Chair
 - h. District "T" Award
 - i. District Toastmaster of the Year
 - j. Area Governor/Director of the Year
 - k. Division Governor/Director of the Year
 - l. Kurzer Prospecting Award

Director's Award

A. General

The Committee shall be responsible for considering and selecting the "Director's Award" for any active Toastmasters club in District 35 which has, over a period of years, distinguished itself by demonstrating the concepts and ideals of Toastmasters International. No club shall be presented with the award more than once in any five-year period.

B. Membership

The District Director shall chair the Committee. The Program Quality Director, Club Growth Director, and Immediate Past District Director shall comprise the remainder of the committee.

C. Scope of Duties and Responsibilities

1. Establish rules of procedures for the Committee operations.
2. Formulate the basis upon which the Director's Award shall be made.
3. Review all possibilities in the district for the award.
4. Encourage nominations for the award from any currently active Toastmaster in District 35.
5. Consider all nominations for the award and either select a recipient club or determine that no award shall be presented for the current year.
6. Begin committee activity at least ninety (90) days prior to the Spring Conference.
7. Strive for a decision to be established for the award no less than thirty (30) days prior to the Spring Conference.
8. Notify the Chair of the Hall of Fame Committee of the recipient club.
9. Withhold the name of the recipient club until the Hall of Fame presentation.

D. Criteria to be Considered in Selection of Recipient (to include but not limited to):

1. New membership growth
2. Membership retention
3. Fostering district leaders (Area Director, Division Director, etc.) from within the club
4. Consistent involvement in Area, Division, and District functions
5. Consistent use of the DCP
6. Regular use of a club website with current information
7. Periodic Success Leadership, Youth Leadership, and Speechcraft programs
8. Media publicity
9. New club officers regularly trained
10. All club reports submitted on a timely basis (officer lists, proxies, etc.)
11. Consistent record of educational award completions by members
12. Establishing and maintaining a presence on social media
13. Current information available on "Find a Club" on Toastmasters International website

E. Description of the Award

1. The District shall purchase a red satin ribbon with gold lettering inscribed "District 35 Director's Award 20XX."
2. The Award shall be presented at the annual Hall of Fame ceremony.

E. Accountability

1. District Director

District Event Non-Paying Protocol

A. General

Many questions arise relative to the procedures in setting up special events, especially protocol pertaining to non-paying attendees. This procedure addresses how non-paying protocol is handled. Some attendees are non-paying because of their ongoing or special contributions to the district or the event. The following is a guideline, which should be adhered to for district, division, area, and club events.

Note: Protocol is defined as either the code of ceremonial forms and courtesies or a formal set of rules and procedures.

B. Qualifications

At the discretion of the District Director, some of the attendees at district events shall be non-paying attendees, depending on what level of the district is hosting the event **and as budget allows**. The District Director will identify non-paying attendees for district-level events. The Division Director and Area Director will identify non-paying attendees for events at their respective levels. Club Presidents will identify non-paying attendees for a club event.

Guidelines for non-paying protocol:

1. The District Director and guest are non-paying guests at all functions or events.
2. The Division Director and guest at a division function are non-paying guests.
3. The Area Director and guest at an area function are non-paying guests.
4. District officers and guests, when assigned by the District Director to represent the district, are non-paying guests.
5. Officers and guests, when specifically invited to participate in an event or program, should be considered as to whether they are paying or non-paying guests. The invitation should specify.
6. Event attendees can include non-paying attendees, providing the sponsor of the function or event has financially structured it to cover such costs.

The following individuals are non-paying at the Spring Conference, provided funding is available; if funding is not available, decreased pricing may be offered:

1. Region Advisor and guest (when designated by District Director); other International Officers designated by Toastmasters International
2. District Director and guest
3. Program Quality Director
4. Club Growth Director
5. Conference Chair(s)
6. Finance Manager
7. Other special guests as identified by the District Director (e.g., International Officers, Communication and Leadership Award recipient)
8. **The following roles may be subject to performance metrics set by the District Director in order to received decreased or no payment options:**
 - a. Division Directors
 - b. Administration Manager
 - c. Logistics Manager
 - d. Public Relations Manager
 - e. Area Directors (lunch only)

C. Scope of Duties and Responsibilities

1. Designated event host determines which attendees will be invited and which will be non-paying. This should be considered in the development of an event budget.
2. Determine the invitation content, how they will be sent and when, and how non-paying attendees will be

informed. Special invitations may be in a form different than a standard invitation for some guests.

3. Send out invitations at the appropriate time(s) and notify non-paying guests how to RSVP.
4. Some events may require follow-up on the invitations, especially if a special guest has not RSVP'd.

D. Communications

1. Inform the attendees who are non-paying or have a reduced price.
2. Inform event registration chair who are non-paying or reduced price attendees.

E. Accountability

1. District Officer in charge of event
2. District Director
3. Finance Manager

Banquet/Head Table Seating Arrangement

A. General

Head tables at district functions recognize dignitaries and guests. The District Leadership Handbook provides a layout for a single head table of minimal size.

District 35 typically uses two larger head tables for district conferences. It is at the discretion of the District Director to follow the head table protocol.

The Toastmaster of the event is seated to the immediate right of the lectern (facing the audience.) Then alternate seating on either side of the lectern begins with the highest district officer and guest, as long as room is available. Special guests such as an International Officer or Communication and Leadership Award recipient should be seated next to the Toastmaster of the event. Area Directors will have designated seating at lunch for the spring conference, typically near the head table. At the spring conference, the incoming District Officers should be seated at one end of the head table.

When a lower head table is available, any remaining district and division officers and their guests can be seated.

B. Qualifications

Those eligible for head table seating will depend on the event. For district events, actual seating will depend on available head table size and the direction of the District Director.

The following illustrations are the suggested District 35 head table seating arrangements for district banquet or luncheon head tables, as well as division and area events.

District Head Table Seating

Top Level								
G	E	C	A	Lectern	B	D	F	H
X X	X X	X X	X X		X X	X X	X X	X X
Lower Level								
X X	X X	X X	X X	X X	X X	X X	X X	X X

<<< AUDIENCE >>>

Top Level

- A. District Director and guest (when Toastmaster of the function, or else moves to next lower seating position)
- B. Program Quality Director and guest
- C. Club Growth Director and guest
- D. Administration Manager and guest
- E. Immediate Past District Director and guest
- F. Finance Manager and guest
- G. Public Relations Manager and guest
- H. Logistics Manager and guest
- I. Conference Chair and guest (if space is available)

Typically not all district officers on the upper level have guests attending. Guests, when present, are seated to the side of the dignitary away from the lectern.

Lower Level:

1. Additional seating for Division Directors, and for D, F, G, H if room is not available on top level.
2. Note: for Special Guest seating (e.g. Region Advisor, Communication and Leadership Award recipient), place at (C); original (C) moves to next lower seating position (D), and (D) moves to lower table, etc.

C. Scope of Duties and Responsibilities

1. Determine if the event will have a head table and how many people it will accommodate.
2. Based on the example above, identify who will be attending and monitor which of them had indicated they will attend, and if they have a guest.
3. Inform individuals that they will be at the head table.
4. Prepare and place name cards at the head table seating locations.

D. Communications

Inform those at the head table where they will be seated. This could be done by the Logistics Manager or Conference Chair at District level events or an individual designated for any District level event.

E. Accountability

1. District Officer in charge of event
2. District Director
3. Conference Chair(s)

Financial Procedure

A. General

Toastmasters International provides finance policies and guidelines in the Governing Documents Policies and Protocol, especially in sections “Policy 8.3, District Leader Expenses” and “Policy 8.4, District Fiscal Management.” Finance Manager training is provided by Toastmasters International. The content duplicates some information only to provide context for district-specific procedures and practices.

B. Travel Reimbursement

The District Executive Committee, and all those approved prior to incurring the expense by the District Director, shall be reimbursed up to the rate defined during the budget process. Reimbursement will be for all travel connected with official business of their office, in alignment with Toastmasters International policy maximums, and if monies are available. The rate is set at the Federal Charitable Organization mileage rate or as otherwise determined by the District Director as part of the budget process.

C. Administrative Expenses

1. All members in district service for whose category a budget is set up shall be reimbursed for expenses incurred, including mileage and postage, provided monies are available.
2. Individuals may absorb such expenses whenever possible.
3. Telephone calls or Zoom meetings are encouraged to expedite action when necessary.
4. Email or written communications are encouraged whenever possible.

D. District Events

1. All district, division, and area functions are to be self-supporting unless otherwise designated in this Procedure Manual.
2. Attendees’ meal prices may be increased to offset actual event expenses. Registration fees shall be used only where no other income is available and by permission of the District Director.
3. Planning shall be realistic with the aim of creating neither a profit nor deficit. Any incidental profit accrued is to be forwarded directly to the Finance Manager. The District will provide financial assistance for scheduled district events, as long as previously accrued profits have been returned to the District account. The amount of assistance and circumstances is determined by the District Executive Committee as part of the budgeting process.
4. All district, division, and area events involving meals and/or room rental are to be covered by a contract, to be signed by the District Director or designated District Officer.
5. Financial statements are to be submitted to the Finance Manager for each district, division, and area event.
6. The District Director, Program Quality Director, Club Growth Director, and Finance Manager must be signatories on all district accounts.

E. International Convention Expenses

1. If the Toastmasters International allowance made available to the Immediate Past District Director is deemed inadequate, additional district funds may be made available to them for convention expenses as part of the budget process.
2. Toastmasters International provides travel allowance for the District Director, Program Quality Director, and Club Growth Director for round-trip airfare to the convention site. The district will provide additional funds for lodging and transportation expenses such as taxis, trains, or buses as well as meals during travel to and from the event as part of the budget process.
3. To merit the disbursement of District funds, the Program Quality Director and Club Growth Director

must attend the District Officers Training sessions and as many educational sessions as assigned or deemed necessary by the District Director. Attendance is subject to verification and approval by the District Director.

F. Mid-Year District Officer Training

1. Toastmasters International provides travel allowance for the District Director, Program Quality Director, and Club Growth Director for round-trip airfare to the training site. The district will provide additional funds for lodging and transportation expenses such as taxis or buses, as well as meals during travel to and from the event as part of the budget process.
2. See Governing Documents: Policies and Protocol, section Policy 8.3, District Leader Expenses for other reimbursement by Toastmasters International or the District.

G. Financial Reserves

In addition to the minimum reserve requirements of Toastmasters International, each administration shall strive to operate within its budgetary limitations so that an additional amount equal to the District Reserve is held across other non-reserve district accounts. This is necessary as no income accrues to the district until after the District Clubs make membership dues payments to World Headquarters on October 1.

H. Financial Operations for the Year July 1 to June 30

1. Incidental Income from Area, Division, and District Events
 - a. All surplus funds that accrue from area, division, and district events shall be sent to the Finance Manager for deposit to the district bank account.
2. Expense Reimbursements / Payments
 - a. All District expense reimbursement requests and required supporting documentation should be submitted via the Toastmasters web-based expense system (Concur) whenever possible.
 - b. In cases where the Toastmasters system cannot be used or its use is impractical, District 35 expense forms provided by the Finance Manager are the only forms to be used for submitting expenses for reimbursements / payments via check in accordance with the Financial Procedure.
 - c. Per Toastmasters guidelines, a single expenditure in excess of \$500 USD must be authorized in advance in writing by both the District Director and the Program Quality Director or Club Growth Director.
 - d. All reimbursement requests and required supporting documentation are to be submitted promptly within the Toastmasters web-based expense system for approval no later than end of the month within 60 days of the actual expense. All reimbursement requests submitted after this date could be cause for non- reimbursement by the district. Requests for reimbursement for the fourth (4th) quarter (April–June) shall be submitted by June 22nd or as soon as is practicable thereafter.

Schedule for Submitting Expense Reports

July	→ September 30
August	→ October 31
September	→ November 30
October	→ December 31
November	→ January 31

December	→ February 28 (or 29 if leap year)
January	→ March 31
February	→ April 30
March	→ May 31
April	→ June 22
May	→ June 22
June	→ June 22 (or as soon as possible thereafter)

3. Record Keeping (Disbursements)

The Finance Manager must record all disbursements into the Toastmasters web-based accounting software (Intaact). The following items must be recorded in the accounting system:

- a. Date of check
- b. Due date of payment (usually current accounting month)
- c. Check number
- d. Check amount
- e. Account label and reporting code charged, per budget and audit report
- f. Event period (for Toastmasters Leadership Institute or convention expenses)
- g. District Reserve and Checking Account uses
 - i. District Reserve
 1. Expense reimbursement via Toastmasters web-based expense system (Concur)
 2. District purchases from the Toastmasters International store
 3. Other charges from Toastmasters International
 - ii. Checking account
 1. All other expenses

Electronic or paper copies of receipts / invoices should be retained for the mid-year or year-end audit, and then sent to Toastmasters International for their documentation.

4. Record Keeping (Income)

The Finance Manager must record all income into the Toastmasters web-based accounting software (Intaact). The following items must be recorded in the accounting system:

- a. Date of income
- b. Due date of income (usually current accounting month)
- c. Source of income
- d. Amount of income
- e. Account label and reporting code per budget and audit report
- f. Event period (for TLI and Conference items)
- g. Operating income accounts including contributions, contests, and conferences (meals and registration), miscellaneous income.
- h. Electronic copies of paper deposits should be retained for the mid-year or yearend audit, and then sent to Toastmasters International for their documentation.

5. District Budget

The District Director shall, no later than 30 days prior to the Toastmasters International deadline for filing of the district budget, present a proposed budget to the District Executive Committee. The District Executive Committee shall review and revise as they deem necessary and accept the budget. The accepted budget shall be published on the District 35 website and also submitted via email for the September District Council meeting for the purpose of budgeting funds for the number of different accounts to coincide with the expenses as listed on Toastmasters International requisition for District funds report, and the District audit report; see the Toastmasters International Annual Budget Template -

Chart of Accounts.

6. District Bank Account

A District bank account is to be established for the purpose of recording all income and disbursements in the operation of the district. This operating account is to be used for all income. All disbursements covering the expenses, per documented invoices and expense accounts, may be paid by check or debit card via the operating bank account.

This account affords better internal control and offers little chance of diverting funds to unauthorized uses.

7. Special Conference Account

All conference income and expenditures shall be made solely through the district bank account (see Section XVII (H) (7) above).

All income and disbursements relative to the functions of the conference are to be documented and a final financial report is to be submitted by the Finance Manager to the District Executive Committee within sixty (60) days of the close of the conference.

Responsibility for the final accounting rests with the Conference Chair in conjunction with the Finance Manager.

8. District Reserve Account

The district reserve account is held in an escrow account at World Headquarters, is released upon request from the Finance Manager, and approved by signature of the District Director.

The district must make an accounting to World Headquarters for the way the funds under district control are utilized.

- a. This accounting is made through two audits conducted by the Audit Committee. Funds will not be released to the Finance Manager until World Headquarters has these audit reports.
- b. This first audit covers the period July through December of the current administrative year and must reach World Headquarters by February 15.
- c. The second audit covers the period January through June of the current administrative year and must reach World Headquarters by August 15.
- d. No funds will be authorized to be withdrawn by the district until each audit has reached World Headquarters and approved.

District Reserve Fund Accrual

- a. The district reserve fund accrues when each club in the district sends in their semi-annual dues (October and April). A portion of these dues are put into the district reserve account by World Headquarters. Also, for every new member's dues submitted to World Headquarters, a portion is placed in the reserve account. This also applies for dues received from members of a newly chartered club.
- b. Each month, the District Director and Finance Manager receive a report from World Headquarters showing the current balance as well as the additional funds deposited in the reserve account. The District Finance Manager will include this information in the next Finance Manager Report. It is also recommended that a copy be made available to the Audit Committee. This enables the committee to prepare information before the audit begins.

9. Credit / Debit Card

- a. Credit Card accounts cannot be opened on behalf of the District
- b. Toastmasters International offers a Corporate Credit Card which is the only 'District Liable' credit card permitted; this card is directly connected to the Toastmasters web-based expense system (Concur)
- c. Cards are available to 4 officers at the discretion of the District Director in accordance with Toastmasters International policy
 - i. District Director – recommended
 - ii. Program Quality Director – recommended
 - iii. Club Growth Director – optional
 - iv. District Finance Manager – optional
- d. Debit Cards
 - i. Use of Debit / ATM cards on District Accounts is prohibited
 - ii. District checking account funds must be accessed via check

10. District Bereavement Policy

- a. The District may spend up to \$25.00 in acknowledgment of the passing of the current District Director, a Past District Governor, or a Past District Director. The acknowledgment may be in the form of flowers or a memorial if so designated by the family of the deceased.
- b. The District may send a card of sympathy on the passing of the spouse of the current District Director, a Past District Governor, or a Past District Director.
- c. The District may send a card of sympathy on the passing of a former or current District Officer. This includes any member who has served as an Area, Division, or District officer.
- d. The District may send a card of sympathy on the passing of a current District member.

11. Resources

- a. Toastmasters International Governing Documents; Policies and Protocol
 - i. Policy 8.3, District Leader Expenses Policy 8.4
 - ii. District Fiscal Management
- b. Toastmasters International Annual Budget Template – Chart of Accounts
- c. Managing District Finances (Item 1307)

E. Accountability

- 1. District Director
- 2. Finance Manager
- 3. District Executive Committee

Conference Rotation

A. General

District 35 rotates conferences through the divisions. In order to establish a balance throughout the district for conference sites, the sequence for each division has been established by the District Director. This schedule is maintained by the Site Selection Committee Chair. When new divisions are created or divisions are disbanded due to realignment, the sequence will be adjusted.

Changes can be made by the District Director in the rotation schedule in the best interests of the district. Site rotation should result in conferences not following each other in the same division, even in different years.

In the event that the scheduled division is unable to host a conference according to the rotation schedule, the District Director will determine the location of the conference in another division.

B. Qualifications

The District Director works with other district officers and the Site Selection Chair to modify the district conference schedule. This is reviewed by the District Executive Committee. Final approval is by the District Director.

C. Scope of Duties and Responsibilities

1. The District Director requests a change in the rotation schedule to the Site Selection Committee Chair.
2. The Site Selection Committee Chair coordinates input and recommends a new rotation schedule.
3. The recommendation is reviewed by the District Director, Program Quality Director, and Club Growth Director. Appropriate changes are made.
4. The recommended change is presented to the District Executive Committee and approved.

D. Communications

1. Conduct such communications necessary between the District Director and Site Selection Committee Chair for schedule changes.
2. If there are changes during the interim year in hosts or sites for conferences, the sitting District Director, with concurrence of the District Executive Committee, shall act to rectify any problems.

E. Accountability

1. District Director
2. District Executive Committee

Charter Meeting Program

A. General

The Toastmasters International publication “How to Build A Toastmasters Club” (Item 121, page 9), briefly describes a charter presentation meeting. Previous versions of this publication suggested the district officers’ involvement as having the top district officer deliver a brief speech explaining the purpose of Toastmasters and then present the charter. District Directors have thought that with more time available, involvement could be expanded, especially if there is a dinner along with the meeting.

B. Qualifications

Depending on their involvement, the Club Growth Director and respective Division and Area Director(s) will work with the members coordinating the startup of the new Toastmasters club to organize the charter meeting program. Specific details should be shared with the District Director.

C. Scope of Duties and Responsibilities

1. The club sponsors shall work with the leaders of the club being formed and district officers to establish a date, venue, and type of event. This includes how much time is available for the district portion of the program.
2. The District Director determines which district officers will attend and provides that information to the event organizers.
3. If 15 minutes are available at the event, the highest-ranking District Officer present can introduce the other district officers; explain the Toastmaster program; present the charter to the Club President; and present Charter Member certificates. If more time is available, the other district officers present can speak for a couple minutes, possibly covering their scope of responsibility, in the order determined by the highest-ranking district officer.

D. Communications

The District Club Growth Director and the club sponsors shall coordinate charter presentation logistics with sufficient time to notify participants.

E. Accountability

1. District Director
2. Club Growth Director

Division and Area Contest Financing

A. General

The Toastmasters International documents, such as the Speech Contest Rulebook, describe how to operate division and area speech contests, but not how they are financed. District Directors determine any funding from the district for speech contests at the division and area level; this funding is presented and approved in the District Budget.

Major financial considerations include:

1. All division and area contests are to be self-supporting and designed to break even. A portion of the contest budget may include a District subsidy as determined by the District Director. Under no condition are clubs, at any level of contests, to be assessed fees to defray expenses.
2. Under no circumstances is there to be "built-in funding" at area or division level for future use at these levels.
3. Under no circumstances may any contestant be charged a fee to participate at a contest.
4. The District Tax Exempt number shall be used at all contests for any expenses.

B. Qualifications

1. The Division Speech Contests are the responsibility of the Division Director.
2. The Area Speech Contests are the responsibility of the Area Director.
3. This responsibility includes fiscal management so that costs are covered by the attendees, plus any District subsidy.

C. Scope of Duties and Responsibilities

1. Determine award costs. Coordinate acquisition of the first and second place trophies with the Program Quality Director. This includes whether the district is providing the trophies or reimbursement to the district is required. Participation and appreciation certificates should be printed from the Toastmasters International website.
2. Determine how much, if any, the district will subsidize food and beverage or other costs.
3. Determine if there are any other costs. Attendees should be informed as to any expenses they will need to pay such as meal and gratuity costs or contest venue.
4. Financial statements are to be submitted to the Finance Manager within 30 days after the conclusion of the event.

D. Communications

Conduct such communications as necessary to fulfill the financial responsibilities for the contest, especially with the District Director and Program Quality Director.

E. Accountability

1. District Director
2. Program Quality Director
3. Area and Division Directors
4. Finance Manager

Technology Committee

A. General

The committee exists to oversee and operate the District audio/visual (A/V) equipment, keep current on applicable technology, and advise district leadership of long and short term technology needs.

B. Membership

1. Technology Committee Chair as appointed by the District Director
2. Committee shall consist of members in good standing (minimum of two), appointed by the District Director in conjunction with the Technology Committee Chair.

C. Qualifications

1. Any member in good standing may serve on the committee.
2. Experience with A/V equipment of the type used for district speech contests, education sessions and ballroom events, its setup and application, is required. These events typically include an audience of 100-300 members from classroom to ballroom sized.
3. Knowledge of virtual and hybrid meeting platforms and best practices for conducting effective meetings.
4. The District Director shall appoint the committee chair, and in conjunction with them, shall appoint the other committee members.

D. Scope of Duties and Responsibilities

1. Establish and regularly review set-up and operations protocols for main events at District conferences. The latest version of the manual(s) shall reside in a read-only format on the district website. Editable manual(s) shall be maintained by the committee chair.
2. Recruit, build, and sustain a team of trained sound technicians to provide direction, guidance, and back-up for District events.
3. Document procedures to assure sound quality, professionalism, and consistency in set-up and operations.
4. Maintain inventory and secure storage of District A/V assets.
5. Advise District Director on the maintenance condition of district A/V assets (at minimum, in semi-annual report)
6. Obtain professional advice and assistance where required and within approved district budget
7. Coordinate District Zoom accounts
8. Setup Zoom Meetings and manage online and hybrid platforms especially during District events

E. Communications

1. Committee Chair, or designee, shall participate in District Conference planning.
2. Prepare semi-annual report of District technology assets and needs; due on January 30 and July 31.

F. Accountability

1. District Director

Document Management Procedure

A. General

The nature of the leadership structure in Toastmasters' districts is such that people change roles annually. The potential for losing institutional knowledge is great. For this reason, it is important that records be maintained so that each year's leaders can build upon the success, experience, and data from prior years.

A document management system has been created to retain this data. This procedure will describe the governance process defining:

1. What information should be retained
2. For what period
3. Who is responsible for maintaining each record
4. In what electronic file format
5. Who is responsible for overseeing the retention procedure

B. File Structure

All documents described in this procedure shall be stored in the District file management system, currently hosted on the District website. Emails and other storage devices (USB devices, discs, paper folders, etc.) may be convenient for short term or one-time transmission but does not facilitate long term or consistent storage.

The file management structure is shown in the [District Document Management File List and Structure](#). This file structure is maintained in order to easily locate files.

C. Document Retention

Documents shall be retained for a defined period as listed in the Document Management File List and Structure.

1. Most recent plus 5 years.
 - a. These documents shall be retained for the current Toastmaster year, plus the previous five (5) Toastmasters years.
 - b. In each subsequent Toastmaster year, the oldest year's record shall be deleted from the document management system.
2. Until superseded.
 - a. These documents shall be retained until a more recent or updated version is available.
 - b. Example: the District's tax-free certificate
3. Indefinite.
 - a. These documents shall be retained indefinitely. Often, these are files which are added upon year-to-year.
 - b. Example: the attendance records of district conferences
4. 3 years, 7 years, etc.
 - a. This is self-explanatory. Each year, the oldest year's record shall be deleted from the document management system.
 - b. These are generally mandated by either Toastmasters International or other legal entities.

D. Scope of Duties and Responsibilities

The number of individuals responsible for saving documents is purposely limited to a small number of

individual (roles). This is because it is much easier to train a small number of people:

1. Finance Manager (generally, finance files)
2. Program Quality Director (files relating to education, training, conference, etc.)
3. Club Growth Director (files relating to club growth and membership)
4. Administrative Manager (meeting minutes and miscellaneous files)
5. District Director

It is the responsibility of the individual in the named role to upload the required files, the indicated format within the indicated timeframe as shown in the [District Document Management File List and Structure](#).

E. Access

Unless specifically indicated, all files shall be generally accessible to anyone with internet access.

Where indicated in the [District Document Management File List and Structure](#), the Webmaster shall enable password restricted access on a per-file/ folder basis

At the earliest possible time, the Webmaster shall provide and/or remove access to individuals as they assume or leave district leadership roles.

F. Communication

It shall be the responsibility of the Administrative Manager to regularly review adherence to this procedure and report compliance semi-annually to the District Director with copies to all responsible roles and the Webmaster.

G. Accountability

1. Administration Manager
2. District Director

TOASTMASTERS INTERNATIONAL

DISTRICT 35

PROCEDURE MANUAL

REVISED
APRIL 2023