

Toastmasters International

District 56

District TLI Guide

(Toastmasters Leadership Institute)
Training for Club Officers

Version 1.0

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Submitted By 2016 – 17 TLI Committee
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District 56 Toastmasters

TLI Guidelines and Best Practices

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“Guidelines and Best Practices” (cont’d)

Introduction

Familiarize yourself with the material in this handbook. There is a digital copy of every document that is referenced in this handbook on the storage device inserted into the sleeve of the binder. The printed copies in this handbook are for illustration purposes only. Each digital document is in an editable format. real time information. Keep all documents updated with current information to help keep track of your plan progress. There is a listing of all documents that are referenced in this handbook (*Attachment A: TLI Documents- Referenced or Printed Material*).

1. First Thoughts

Congratulations on your appointment to serve District 56 as TLI (Toastmasters Leadership Institute) Chairs. This is a rewarding role that not only helps every club in the District; it will also improve your leadership skills; including organization, time management, team building and delegation. If you have not yet conducted the HPL (High Performance Leadership) project, this is a great opportunity to do so, in fact as a past TLI Co-Chair, I would highly recommend it! An HPL will carry over into the new Pathways Program.

Connie Spain DTM, TLI Co Chair 2016-2017

Congratulations and thank you for stepping up as a District Leader! As TLI chair, you are embarking on a fun journey with a great learning opportunity.

You will learn how to:

- *Design and organize an educational event to meet the needs of our members.*
- *Be flexible, adjust to different situations and quickly make the necessary decisions.*
- *Motivate and interact with other District members, sharpening your interpersonal skills.*

In payment for your hard work, the most rewarding moment is seeing the smiles of new officers gathered around a table learning their roles and gaining new skills to help their clubs. You are about to find out this for yourself! Best of luck on your new journey!

Linh Nguyen DTM, TLI Co Chair 2016-2017

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You might be reading this because you have agreed to serve District 56 as the Refreshment Co-chair for the TLI’s. This role sounds intimidating and overwhelming, but it really isn’t, so don’t panic. There is one certainty in Toastmasters: if a Toastmaster attends an event, they want food. The importance of meeting different types of food needs became more apparent during the 2016-2017 year. Choices should include options for vegetarians as well as those making healthier choices. Gone are the days when donuts and coffee please the attendees. The food need not be gourmet and most of the suggestions I give below are already-prepared food items. I believe that you will find this Co-chair role rewarding; I met lots of different Toastmasters by “manning” the food table.

Gwen Sullivan, DTM, TLI Refreshment Chair 2016-2017

There is no tried and true formula for holding TLI’s. By paying attention to this Guideline your “Wheel will NOT have corners on it.” Once you can answer the questions below for your various TLI’s, 50% of the work will be done.

The first set questions that need answering:

- *Is the venue large enough for anticipated attendance?*
- *Is there a way to hold individual breakouts for each Officer Role?*
 - *preferably in separate rooms, but if those are not available*
 - *can the single room be setup for 7 or 8 distinct groups?*
 - *Don’t underestimate the space requirements.*
 - *Space constraints might require a different format for the TLI session.*
- *There are four key areas to be considered when planning the TLI season:*
 - *How many to schedule and where to hold the TLIs?*
 - *What topics should be covered?*
 - *Which training format?*
 - *Length of TLI?*
 - *Who should give presentations vs. the individual officers training sessions?*
 - *How will the record keeping be managed?*

R.W. “Bill” Sullivan DTM, Program Quality Director 2016-2017

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“Guidelines and Best Practices” (cont’d)

2. Getting Started

2.1 What to do . . . and where to begin?

These are two very legitimate questions that need to be answered for a TLI team to be successful. This can seem like a daunting task and have you feeling overwhelmed; but remember this one important thing... there is always help available. The District Leadership team is at your service to assist, because the success of District 56 (D56) depends upon their guidance and leadership. The Program Quality Director (PQD) heads up the TLI team, and therefore has the ultimate responsibility of ensuring that the TLI team members are prepared and have the needed resources to conduct effective TLI’s.

As TLI Chairs, you too have shared responsibilities. By accepting this appointment, you are agreeing to help the District reach its goal of training 75% - 85% of all club officers. (This is measured based on percent of the number of clubs in the District, with 4 or more officers trained per season or term). This is a Key Performance Indicator for the District and will determine what percentage of funds is returned from World Headquarters back to D56.

A TLI is multi-faceted and has many moving parts; each one has its challenges and uniqueness. Never are there any two events that are the same, due in part to the differences in venues, people, and life in general. Things happen, **things are going to happen** and many of them will be out of your control. If you plan well, knowing that there will be a few last-minute changes and **have a backup plan**, it will greatly reduce the chances of a crisis situation (Will be discussed further in Lessons Learned Section 18). Plan well by using the documents in this handbook to their fullest capacity. For an easy overview of a TLI, see the Punch List reference (*Attachment X: TLI Punch List*)

Plan to meet with the **entire TLI team** (the Trio: District Director, Program Quality Director and Club Growth Director; exiting TLI Chairs and incoming TLI Chairs) face to face before the TLI season begins to get to know each other. Set expectations; share your thoughts, ideas and experiences as leaders. Bring your expertise to the table and share it. Each member of the TLI team has a valuable contribution to make to the success of District 56. Remember, the goal of the TLI is to train a nominal 85% of all club officers, by creating events that are fun yet educational. Creating a TLI that has that WOW factor will go far in having return attendees and increased participation.

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3. Reserving a Venue and Date

3.1 Rental Expenses?

The District doesn’t usually pay for venue space; instead trying to utilize corporate and public spaces that are available at no charge. D56 will sometimes consider paying a minimal fee for a particular venue, if necessary, due to specific needs that can’t be met elsewhere. D56 holds TLI’s at smaller venues spread around the city without venue cost expenses (and more convenient for our attendee’s travel) than trying to get a very large turnout at a specified date in a larger venue that has a very large fee involved.

3.2 When do the TLI’s occur?

TLI’s have two seasons:

- The Summer Season (first period in the Toastmaster year) is **June 1st through Aug 31st**.
 - Typically, a makeup TLI in November for new clubs that Charter between Sept 1st and Oct 31st is allowed. This gives new clubs the opportunity to receive officer training for both seasons.
- The Winter Season (second period) is **December 1st through February 28th**.
 - There is no makeup TLI because the new clubs will have already missed the opportunity to have their officers trained for both seasons and are not eligible to earn the DCP points earned for officer training.

It is common to kick-off each season in June and December with a “*Super Regional TLI*”. The TLI seasons begin soon after the corresponding District Conferences and Speech Contests. There is a lot of enthusiasm generated from these events and the resulting TLI session usually has a higher attendance figure. It is a highly-publicized event and should be held on a Saturday, when members and officers are more likely to attend. There is typically a well-known featured speaker(s) invited to give a longer educational speech(es) with a 30-minute average time length, and perhaps 2 or 3 other well-known District members that add to that WOW factor at these kickoff TLI’s.

It is essential to coordinate the TLI dates on each TLI so they don’t conflict with any other D56 business. This is part of the initial planning held with the Trio because they may be aware of upcoming events that may not yet be publicized on the calendar. The numbers vary on how many TLI’s should be conducted in any given year, but currently it is suggested to conduct **at minimum both summer and winter seasons:**

- 5 regionals (125-150 attendees)
- 5 locals (50-80 attendees)
- 2 remotes (20 – 35 attendees)

The 2 remote TLI’s are held for the Galveston and College Station clubs. The appropriate mix of Regional and Local TLIs will be based on the availability of available, appropriate venues. Also, note that the larger the venue

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(and expected attendance) the higher the need for the Districts PA System (Public Address System, look at *Attachment B: Venue Contact Spreadsheet* for indications of venues that have their own PA systems.)

Another consideration is the TLI format. There are three basic formats (many variations):

- Standard – One common room plus extra breakout rooms. (All TLIs)
 - General Presentations in a common room
 - All attendees at one time
 - Separate rooms for each officer training breakout session.
 - The big room can have areas of the room designated for different office groups – more than 4 groups (one in each corner of the room).
- Panel – Only one large room needed for all the attendees (usually limited to Local TLIs)
 - One room with table and chairs for the panel of trainers
 - one for each officer role to be in front of the room and to present their training one at a time to the entire audience.
 - This facilitates Q&A and cross training of the entire officer group. Can be boring for the officers not being discussed at the time if they are not interested in the current officer role.
 - Time per officer role is cut down, but works well with a smaller group.
- Modified – Joint Training (Best for small groups such as remote locations)
 - One presenter does all the training for all the attendees, in the same room at the same time.
 - This is the most efficient time utilization at the remote locations.
 - Determine the mix of officers in attendance and tailor to their needs.

3.2 When and where are the TLI's?

Refer to *Attachment B: Venue Contact Spreadsheet* for a comprehensive list of recently utilized venues. The attachment contains useful and valuable information that will help when planning your venue.

There are many things to consider when choosing a location:

- Is this a Local or a Regional TLI (weeknight or Saturday)?
- How many rooms are available? (1 large auditorium and 6 break out rooms are the optimum)
 - What is the room capacity? Is it only theatre seating or classroom also?
 - Is the venue convenient and accessible? (consider location and city events like the Rodeo on the same timing)

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- Does a company employee have to be present (corporate club rooms)?
 - Is there free parking or is parking fees charged such as downtown?
 - Are the rooms A/V ready? (A/V includes both the PA system and a projector/screen system – some have both or just the projection system only)
 - is there a fee to reserve/use the A/V?
 - Is there a fee/ deposit required to reserve the venue? (Community Centers often do – usually a check on “Hold” for a time of a year and other venues require a fee.)

When you begin reserving venues and setting dates, look for several options at each location and don’t get stuck on just one date. The more flexible and creative you are for scheduling purposes, the easier the task will be.

When you are calling facilities for reservations, give them several options and see which dates are open. Give those same dates to every facility contacted. Then, you can look at the entire schedule and determine which locations and dates should be cancelled.

Many of the Community Centers are booked well in advance, up to a year sometimes for holidays, and are difficult to get a reservation around the Holiday Season.

3.4 Who needs to make the reservation?

Many of the Community Centers require a yearly \$100.00 refundable deposit and new paperwork for each Center.

The Community Centers begin taking reservations for the next calendar year on October 1st (or the first workday after). A new check for deposit purposes is required to be presented before any reservations will be accepted. The check will be returned if there have been no damages to the facility. Check with the Program Quality Director and Finance Manager about having the District issue these checks or if it will need to be a personal check.

Coordinate with the Trio on who will be responsible for taking the deposit check and the forms to the Centers (you need a representative at each Center you wish to reserve with the check and paperwork in hand). Once the deposit is paid, ONLY the person whose name is on the paperwork will be able to make reservations for DISTRICT EVENTS ONLY. For example, a Division Director would like to hold a contest at the same venue as a TLI; they may not make the reservation themselves under the umbrella of the District. They would either need to put up their own deposit, or coordinate with whoever is on the paperwork to reserve the venue for them. By signing the forms, we agree to abide by the Community Centers rules and regulations, agree to be responsible for damage, and to leave the Center clean upon exit.

*Note: Community Centers do not allow exchange of money, there shall be no selling of goods.

3.5 Corporate Clubs

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Corporate clubs usually require that a company employee be present during the entire TLI. That employee will probably also be the contact for reserving the room/s and will be held responsible by their employer for the welfare of the premises. Take great care to leave all venues in better condition than when you arrived. This will help to ensure the location can be utilized again.

3.6 Libraries

Libraries can present a challenge. Read their policies online and decide if this truly fits your need. Having 50-80 people in a library gets to be quite noisy, and librarians will tell you to turn down the volume, and perhaps tell you not to come back! Libraries typically require paperwork to reserve a room, and will not open the room to anyone other than whose name is on the paperwork. Sometimes they will also charge a minimal non-refundable fee.

4.0 Securing Educational Speakers

4.1 What is the goal?

Every person attending a TLI should feel energized, empowered and enthusiastic when they leave. What is learned in the educational sessions portion (typically the first half) of the TLI can be taken back to the club and implemented as a working model of what they learned to help create a quality club and retain members. This portion of the meeting needs to be uplifting, have a clear message of education, and be fun and powerful!

4.2 What is the subject matter?

The first and the second seasons of TLI have different objectives. During the first season, a larger percentage of your attendees have never held a club office before. It is important to focus this training season geared toward the fundamental officer learning experience. Refer to *Attachment C: TLI Tracker Spreadsheet* for educational session suggestions. There are several ideas for the topics of the educational sessions listed, though you are not limited to these. Brainstorm and try to find the perfect topic to add to this list to create that WOW factor that has been mentioned several times now.

- Summer Season Typical Topics:
 - Creating Successful Clubs
 - Speech Contest 101
 - Contest Judging
 - Developing a Club Success plan
 - DCP Program

TLI's conducted in the Winter Season (second season) are geared more towards how the officers are an instrumental part in helping the club members reach their goals. The training is more focused on individual

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members achievements, membership retention, club growth, and not as much on the roles and responsibilities of the officer positions.

- Winter Season Typical Topics:
 - Club Success Plan
 - Moments of Truth
 - Conflict resolution
 - Speech Contests – “Putting on a Good Show”
 - Member Retention & Club Membership Building

Again, please use all the resources you have available to conduct the best quality TLI’s possible.

4.3 How to choose educational speakers

The speakers need to be dynamic with their message, with excellent presentation skills that will enhance the valuable take aways. They should be able to effortlessly interact with and engage the audience to answer questions and keep the audience’s attention.

District leaders are a great resource for securing the best possible educational speakers. The Trio, Division Directors and Area Directors should be willing to help, especially when the TLI is in **their** Division. Call on them! Past District officers, DTM’s, and Contest winners are also good resources for educational speakers. Give each one a list of topics and dates to choose from.

Beware; don’t exhaust your speakers by asking them to present an excessive amount of times. Many people are eager to help some but may resent too many requests. A good rule of thumb is a maximum of twice in any one Season (4 times a year).

Always have a contingency plan and be flexible.

5. Securing Officer Breakout Session Trainers

5.1 What is the goal?

Simply stated, the goal of all TLI’s is to have 75%-85% of all club officers trained on how to effectively perform the roles, responsibilities and duties of their elected positions each TLI season. Some clubs elect officers every 6 months (especially corporate clubs), and we can assume that with each election, there will be new officers that have never held an officer position before. Although it is important to train **every** individual that attends a TLI (even non-officers who are just considering the position), a sincere focus should be directed towards the new officer. Seasoned officers will benefit by offering a variety of training styles and formats, something they have not seen or heard before to keep them interested in attending.

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5.2 Tracking the Trainers

The trainers should be well versed in the role they are training, preferably having held that role themselves and able to answer questions effectively. There should never be a hidden agenda (i.e. a trainer has a book for sell on Amazon and this is the opportunity to pitch it); even if it does relate to Toastmasters and the subject matter. The same document that tracks the educational speakers can be used to track the breakout trainers (*Attachment C: TLI Tracker Spreadsheet*). It is a well-organized spreadsheet that keeps all information together.

It is beneficial to have an 8th training session for “Seasoned Officers” at the Regional TLIs. These are members who have previously held an officer’s position for a minimum of 2 years. This 8th training should only be conducted by someone with **many** years of experience, and who has held many officer’s roles as well as district service. Either the District Director and/or the program Quality Director are the best candidate for leading this discussion. This breakout session does not follow the regular format of the other seven officer breakout sessions and is usually only conducted at the larger Regional TLI’s. The Trainer should make notes of the information shared within the group and make available to the Trio (and others as appropriate) for a “sort-of-lesson-learned” moment.

5.3 Have a backup plan

As mentioned before, things are going to happen because life happens. All your trainers are volunteers and family and career will always come first. This means there will be unforeseen short notice cancellations. Be prepared to fill a missing role as a trainer yourself, or have a “spare” trainer on hand or “in your back pocket” that can fill any position. It is difficult if all the TLI Chairs are training in the breakout sessions, because at least one of you needs to be the data collector. This will be discussed later. Be flexible, and as a worst-case scenario, if there is an unexpected shortage of trainers, combine sessions; for example, the Secretaries and the Treasurers naturally will go together into one breakout session. This is not the optimum scenario, but still can be facilitated effectively with good time management and good trainers.

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6. Creating an Agenda

6.1 Regional TLI

The regional TLI’s are usually held on Saturdays and have a longer program schedule; therefore, the format of the agenda is slightly different than that of a Local TLI. Remember to be respectful of time. We are asking officers to give up part of their weekend and personal life to attend this event. We don’t want to keep them any longer than scheduled.

We have created two agenda templates. It is easier to save a working copy to your desktop or Google Drive and leave the templates untouched on the storage device. (*Attachment E: Agenda Regional Template*). You should plan for an average of 125 -150 officers at a Regional TLI. Arrange your Educational Speakers so that there is variety, and let the highest-ranking dignitary/member deliver their speech first. If time allows, consider breaks and energizers.

6.2 Local TLIs

Local TLI’s are typically conducted on weeknights at the smaller venues and have a shorter program schedule, but again be respectful of time. We are taking away from dinner time on weeknights because many members come straight from work. Several venues, such as public libraries and community centers require that the event ends by a certain time, including clean up. There is no grace period; the TLI must end on time or risk not being able to use the venue again. Start on time and end on time. An average attendance is 50-80 at a local TLI. (*Attachment F: Agenda Local Template*).

6.3 Logistics and Time Management

For a Regional TLI, reserve the venue for at least 1 hour before and 1 hour after the scheduled agenda and plan on using that time for set-up and clean-up. For a Local TLI, plan on reserving the venue for 1 hour before and 1/2 hour after the scheduled agenda for set-up and clean-up. Set-up includes the Welcome Table, the room(s), the A/V and the refreshments. Clean-up obviously includes the same, but ask for assistance from the attendees. Most Toastmasters will gladly lend a hand to help clean-up.

Planning is the key to being successful when it comes to time management. **There should be a timer monitoring the schedule during the entire event.** Keep the presenters on task! They should have a clear understanding prior to the TLI of their time allotment. If time begins to slip, or the TLI does not start on time, adjustments should be made during the opening announcements, closing announcements or during the break/s. Shorten these to compensate for time lost elsewhere. If you have told the speakers they have 12-15 minutes, then you can slightly shorten each presentation by flashing the green signal at 11 min, and gain a few minutes back.

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7. Coordinating Refreshments

7.1 *Who brings the food?*

The 2016-2017 TLI TEAM was fortunate to have an appointed Refreshment Chair that attended the TLI’s and provided most of the food, drinks and accessories. There was an approved budget from the District. Speak to the District Officers when you meet prior to your term and decide if there will be a position open for this TLI Co-Chair again; it is truly a tremendous help! If the position is not open, then it is the responsibility of the TLI team to work together to coordinate food service for each TLI. (*Attachment G: Refreshments Coordination list*). The list contains only suggestions that have been used in the 2016-2017 year.

7.2 *Who pays for the food?*

The District will cover **only the allowable budget per person per TLI**. Although donations of snacks and drinks are truly appreciated from attendees... and may be accepted, they are not to be requested or insisted on.

Local grocery stores, such as HEB, may be generous and contribute to the cause since Toastmasters is a 501©3 non-profit organization. You need to have the EIN [Toastmasters tax ID # 95-1300076 (to be verified and to get a copy of the IRS Certificate see The District Director)] Be ready to fill out the proper paperwork to request these donations. For reimbursement purposes, all receipts (no dollar minimum rule) must be submitted following District policies.

7.3 *Best Practices from 2016-2017 Refreshment Chair, Gwen Sullivan DTM*

Refer to *Attachment H: TLI Refreshments Advice*. Again, consult with the Trio to learn what the exact expectations are for the refreshments at each TLI.

8. Public Relations

8.1 *How to get the word out*

Use every resource available to publicize this opportunity for officers to learn, including social media and word of mouth. Be ambassadors and at every opportunity to announce an upcoming TLI... do so. Stand up and speak! Determine who on the team will be responsible for entering TLIs on the calendar and get the appropriate password. Announcing TLI’s at every opportunity to stand up and tell someone is a greater chance of reaching the goal of 85% of all officers trained by the end of the period. The Vice President of Education for a club may be

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in attendance but the SAA is not, he / she can go back to the club and inform the SAA when to attend the next TLI. Ask District officers, Division Directors and Area Directors to promote these during club visits.

Share on Facebook and other sites.

8.2 District help

The District can send approved e-blasts composed by the PQD to all club officers before every TLI as a reminder of the upcoming events. The emails are issued through the District Webmaster and must be approved by the District Director before they are issued. When practical, synergize and send only one email out for more than one event at a time. The emails should be distributed no more than 3-5 days prior to the TLI, otherwise it becomes less effective and may be forgotten.

8.3 Eventbrite and RSVP's

Eventbrite is a free website used to register for events and track the number of registrations. Use this site for every TLI. Using Eventbrite as a means of tracking the headcount is helpful as a projection tool for both food coordination and printed materials. Historically, the attendance will be double the number of people who register through the Eventbrite website. Even though the website asks members to “register” as an attendee, no registration and no fees are ever required to attend a TLI. A link to the event can be posted on the District 56 Calendar by the team member with Calendar access. Whoever creates the event on the tmd56 website calendar is the only one that can make changes to it. The same is true for Eventbrite (you might want to share Eventbrite password).

9. Printing Documentation

9.1 Who is printing all these papers?

There are several documents that need to be distributed at each TLI at either the Welcome Table or the breakout sessions. Occasionally a speaker may want handouts as well, and that should be coordinated with them several days prior to TLI. If the District still has a dedicated printer, it is very helpful for the PQD to print and bring the material, though sometimes facilitators will volunteer to bring their own printed material. This is truly appreciated. When organizing the TLI, always **ask** if there is any printed material and whether the speaker is bringing his/her own. Otherwise, the TLI team will be responsible for the printed material.

The common items that are brought to every TLI and handed out are the following:

Welcome Table Handouts:

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- *Attachment E: Agenda Regional Template OR Attachment F: Agenda Local Template*
 - *Attachment N: Officer Matrix Handout unless printed on the back of agenda*
 - *Attachment P: **Current** Conference Flyer*
 - *Attachment O: **Current** Dignitary List (From D56 website for most current)*
 - *Attachment L: Officer Sign-in Sheets*
 - *Attachment M: Speaker Sign-in Sheet*

Handouts for Officer Sessions:

- *Attachment I: TLI Slips (for attendance credit)*
- *Attachment J: TLI Break-out Session Evaluation Forms*
- *Attachment K: Facilitator’s Breakout Session Contact Sheets*

9.2 Who pays for printed material?

The same budget guidelines apply for printed material as for the food. The District has a budget for the TLI year, and part of that budget includes printing costs. As mentioned earlier, it is much appreciated to get donations of printed documents but you shouldn’t expect it. When we call for volunteers to speak or train officers, they are already performing a valuable service to the District and should not be responsible for bringing their own material unless they so choose. That’s why you simply ask.

There have been instances when a corporate club will help sponsor a TLI and agree to pay for the cost of printing. If the PQD has the District printer, then he/ she can also print and bring most of the documents. This matter should be discussed when the TLI team meets for the first time before the term begins to set the expectations.

10. Setting up the Welcome Table

10.1 Location of the tables

If space and the venue allows, try to set the welcome table up outside the primary room, near the main entrance. If the venue is not conducive to this, set the welcome table just inside the main doorway perpendicular to the door and away from the food tables. Typically, 1 long table or two smaller tables is sufficient room to spread out the welcome documents.

10.2 What needs to be on the table?

The documents that should be available are:

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- Attachment E: Agenda Regional Template **OR** Attachment F: Agenda Local Template
 - Attachment N: Officer Matrix Handout, if not printed on the back of the agenda
 - Attachment P: **Current** Conference Flyer (if available)
 - Attachment O: **Current** Dignitary List (From D56 website)
 - Attachment L: Officer Sign-in Sheets
 - Attachment M: Speaker Sign-in Sheets
 - Roll of Raffle Tickets / container to hold ticket stubs

Many times, members from other clubs would like to set out their club fliers with upcoming events. This is perfectly acceptable and welcomed! Remember there is no solicitation to buy or sell anything at a TLI. The welcome table is not a book signing table!

10.3 How many helpers?

There should be at least one person behind the welcome table to help facilitate the sign-in process but two helpers are better. The registration line gets long and the faster the process flows and the faster people can get to the food tables; the happier people will be. Happier people mean more participation and expanded learning. Dr. Smedley said, “We learn best in moments of enjoyment”. The welcome committee needs to be upbeat, vibrant, efficient, and enthusiastic. This sets the mood for the entire event.

It is very important to instruct the helpers at this table on how the officers need to sign-in on the officer sign-in sheets for data validation later. **Each officer signs in on each sheet for every office she/ he holds and officers need to sign in on the correct sheets. This cannot be stressed enough!** Data collection and validation will be addressed in detail later in this handbook.

The dignitary list also needs to be completed as the dignitaries arrive, so they can be announced during the TLI Introduction. The helpers are to hand out raffle tickets, one per person who attends. Be sure to keep one half of the ticket and place into the container for the drawings at the end of the TLI. Helpers can put the welcome package handouts together during lull times to speed up the process during heavy check-in traffic.

11. Setting up the room(s)

11.1 A/V options

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Regardless of the type of TLI, Local or Regional, ...There will always be A/V to set up and **TEST** prior to start time in the main meeting room. **Use the 1 hour before the TLI start time to get A/V set up and running smoothly.** Many of the corporate venues and community centers are A/V ready, if previously arranged, with or without a fee associated to the reservation **but** they still need to be tested. The District has a P.A. system with mikes, amps, screens, laptop and projectors. This should be brought to each TLI that is not A/V ready (should also always be brought to every TLI as a backup in case of technical failure). The PQD is responsible for this district property no matter who is in physical possession of the equipment. If you choose to use your own computer, make sure you have the proper connection for the projector.

11.1 Regional

At the larger Regional TLIs there may be several (6-7 individual) rooms reserved for the general session and the breakout sessions. Each of these rooms may be equipped with A/V, and the breakout session trainers may request that they be assigned to a room with A/V. Ask in advance if the trainers need A/V and note it on the *Attachment C: TLI Tracker spreadsheet*. The trainers should provide their own laptops and presentation files. If utilizing A/V, they need to check it out in their assigned rooms before the start time. It is critical for the TLI TEAM to know which breakout trainers need A/V. **If A/V is not available**, this lack of availability must be communicated to the breakout session trainers in advance.

It is also important to assign the rooms based on the size of each officer group. Know in advance how many rooms are reserved and what the capacity is of each. During the 1 hour before TLI start time, survey the rooms and mark down room #s and capacity in case changes need to be made at the last minute. The Eventbrite RSVP should be an indicator of attendance as mentioned before... Multiply the number of respondents by 2 and still be flexible.

11.2 Local

Local TLI's generally have smaller attendance because they target a specific geographic area, but the same guidelines apply as for a Regional TLI for the rooms. There may or may not be multiple rooms reserved and available. Know in advance what the options are when the space is reserved. Almost always at a Local TLI, the breakout session trainers do not have A/V available and must rely on printed material that they bring themselves or provided by the TLI TEAM.

11.3 Noise factor

As mentioned earlier, when 50-100 people are in one room, the noise factor becomes an issue, especially in a library. These are not optimal scenarios and should try to be avoided if possible. Plan well and be ready to

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

separate the trainers into corners, and space out the tables to provide the maximum amount of space between each breakout group. Have the four corner trainers face the walls so their voices do not carry (as much) to the rest of the room.

When meeting in a library, remind everyone to use their inside voices, and not to mill around outside of the room during breaks. Bio-breaks are necessary, but attendees should be respectful of the quietness and serenity of a library. We always encourage Toastmasters to network and we don’t want to squelch that social aspect of a TLI, but it must be done inside the training room or **outside** the building at a library venue if we wish to be able to use.

12. TLI Introduction

12.1 Opening: pledge or no pledge

No flag, no pledge. If there is not an actual physical American flag present in the room, it is not appropriate to pledge to an image. Account for this time on the agenda. Bring a small American Flag you can display and pledge allegiance to.

12.2 Safety announcements

Is this a corporate venue? Many times, a representative from the Company will be required to make a public safety announcement at any meeting that is held on corporate premises. Usually a 1-2-minute explanation of where the exits are in the event of an emergency, where the restrooms are, and what the Company’s smoking policy is. Account for this time on the agenda.

12.3 Dignitaries

Collect the Dignitary List from the Welcome Table immediately before the TLI starts. Give the list to the appropriate person. This will usually be the DD or PQD. There is a proper protocol for recognizing the dignitaries in the audience. They are announced by following the sequence (highest ranking appears first) as it appears on the Dignitary List (latest version always available on District website). The introduction is spoken in this order:

- Title or position: i.e. District Director
- Education achievements: i.e. Distinguished Toastmaster (don’t abbreviate)
- Their proper name: John Doe

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

12.4 Why are we here?

During the 2016-17 TLI seasons, whoever opened the TLI usually gave an 8-10-minute presentation. Many times, it included a summary of the mission and goals of the TLI and then Creating a Quality Club. (*Reference digital Attachment Q: Basic “Creating A Quality Club” PPT*). This served as a good transition into the Educational Speakers and was informative as well as upbeat and vibrant! We wanted to keep the attention of everyone, even during presentations that were primarily informative with many statistics and facts. It is recommended that you clearly state two things about the current TLI:

- The basic Agenda for the day (not in detail, just a summary)
- Announce that anyone not staying for the Officer Training Breakout sessions and completing/turning in the TLI Slips with the required information would not get credit for the training
- Stated that one TLI slip per position and per club was required for each attendance credit requested.

12.5 Who’s the timer?

There should be a timer present who is **very aware** of the schedule and **empowered** to call audibles and make impromptu changes to the agenda timing. If the TLI starts late (which should not happen), or a speaker runs over time (which should not happen), the timer needs to shorten all the subsequent speaker’s presentations to accommodate for the deficit in time. Communicate this to the speakers in advance that they need to be flexible in their timing. When asked to give a 15- minute presentation, the expectation should be 12-15 minutes with the flexibility to shorten if required.

Bio-Breaks are scheduled into the agenda as a courtesy, but can also be shortened if necessary. It is the timer’s responsibility to advise the TLI team constantly to keep all updated on the schedule. One of the TLI Chairs is a good delegate for this crucial role because they have inside information to the agenda and venue limitations.

13. TLI Educational Sessions

13.1 Summer Season or Winter Season?

The Educational presentations should be in alignment with the TLI period. The Summer Season from **June 1st to August 31st** should take into consideration that some of newly elected officers have never held an officer’s position nor previously attended a TLI. The presentations reflect more of the basics of Roles and Responsibilities of the position or basics of club goals. Choose topics that are designed to teach new officers subjects such as Distinguished Club Program or Leadership Tools. *Reference (Attachment R: Digital: Basic “DCP Goals” PP) or (Attachment S: Digital: Basic “Leadership Tools” PPT) (See section on Educational Speakers Section 4 for additional ideas.)*

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

The objectives of the Winter Season (**December 1st – February 28th**) is completely different because the officers have presumably held their positions for 6 months. You have to plan on some newly elected officers present when designing the TLI. There needs to be less focus on roles and responsibilities, and more focus on achieving goals. Choose Education presentations that focus on more specific topics such as Membership Retention, Conflict Resolution, “How to put on a Good Show” (contest readiness) and/or Club Growth.

* Note: As a reminder...have the educational speaker’s presentations preloaded onto the main laptop for easy retrieval and efficient use of time. The speakers should also be reminded to bring a USB back up copy of their Power Point ...just in case of technical failure. There needs to be one dedicated person, (in 2016-2017 it was the PQD) who gets all the slides saved onto his/ her laptop prior to the TLI.

On a typical Agenda: Educational Speakers should take approximately 1.5 to 2.0 hours in total.

14. Officer Break Out Sessions

14.1 How do we assist?

It is the responsibility of a TLI Chair to help facilitate effective training and any necessary follow-up. The trainers have been chosen based on their knowledge and background. Now it is go time! The optimal time allotted for a **Break out session is 1-hour and 15-minutes**. During the Breakout Sessions, roam and spend an equal amount of time sitting in on each of the trainings and listening for clues from the attendees. Prompt questions that may not have been asked but need to be answered. Make sure the trainer is staying on track and complying with the expectations of the training and **they use the full time allotted** for their session.

The Breakout sessions 1-hour and 15-minutes in general should be broken down as follows:

- 5 – 10 minutes determining the makeup of the officer group they are training
 - experienced vs. newbies
 - have they held other officer roles?
- Roles & Responsibilities (as required by Toastmasters)
 - Summer season: 45 minutes
 - Winter Season: 30 minutes
- Best Practices and Q&A with members
 - Summer Season: 20 – 30 minutes
 - Winter Season: 30– 40 minutes

14.2 Training Material

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

The training material should be taken directly from Toastmasters International and scripted. It includes a Manual and Power Point presentations that have been given to each of the trainers in advance. The trainers should be following the training manual, but adding personal stories as they relate to Toastmasters that enhance the learning experience. If the Trainers want to develop their own slides and materials this is acceptable – but you need to monitor their session to ensure they have adhered to the Roles & Responsibility training that Toastmasters requires. Sharing personal stories will help prompt engagement of the officers and opens up the floor for more interaction between members when discussing Best Practices of the Club Officer Roles. Trainers can bring additional training materials on Best Practice if they wish.

Reference (Attachments T.1-T.7 Digital: Trainers Manual and slides PPT) for all 7 positions. There should be no personal agenda of the trainer other than getting credit for a speech. Speaking to Inform, Research Your Topic or Facilitating Discussion are all great projects to get credit for as a speech.

14.3 Getting Credit for Attending

TLI Slips *reference (Attachment I: TLI Slips for TLI Credit)* is distributed by the TLI Chairs **only during the last 10 minutes of the Breakout session**. Keep these out of sight until then. This is how each club officer receives credit for attending the TLI. They must stay until the end of the complete TLI. If an officer leaves after the Educational Sessions and therefore does not fill out a TLI slip, **regardless** that they signed in at the Welcome Table, they will not get credit for attending the TLI.

It is Important to clearly instruct and emphasize that the attendees must fill out one slip for every officer role in every club. For example, Jane Doe is the President of club Generation X and the VPPR of Club Millennial. She attends the Presidents breakout session, but needs to fill out 2 TLI slips, one as the president and another as the VPPR and therefore receive credit for both club offices held. Be sure to collect all the TLI Slips before anyone walks out the door and keep them together in a safe place.

The trainers will get credit for “attending” their officer roles – but should fill out a TLI slip also to get the Club / Role information to the TLI Committee.

14.4 Follow up

Any Toastmaster is welcome to attend a TLI, whether they are an officer or not. Many times, perspective officers will attend to try and learn what will be expected of them should they decide to run for office.

Place a blank contact sheet with each trainer. Attachment K: Facilitator’s Breakout Sessions Contact Sheets. Attendees who wish a follow up email **from the trainer** should fill out their contact information on the sheet. After the session is concluded, collect all sheets and send a copy to the trainer, or let them take a photo of it for themselves.

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

The TLI Breakout Session Evaluation Forms should be organized by trainer, and the results transmitted to the respective trainer for their review.

15. Announcements, Raffle and Closing

15.1 Announcements

Reconvene as one group once the breakout sessions have concluded. It is important that the trainer has used the full allotted time because if one or two of the sessions finish early, the tendency is for officers to leave early before the rest of the breakout sessions are finished. It is difficult to get attendees to stay any longer if they are not immediately guided to return to the General Session for closing.

Final announcements should be brief, and typically include information regarding the next Conference and how to register, when the next TLI is, and any other important dates for the District. If time permits, ask the audience if there are any further announcements regarding upcoming club events and contests. The Conference flyers that were handed out at the Welcome Table are mentioned again as a reminder for registration.

15.2 Raffles

The District Director or PQD may authorize the TLI Co-Chairs to give away registration discounts to the Conference as raffle prizes.

The rule of thumb is 1 discounted registration for less than 50 attendees, 2 discounted registrations for 50-100, and 3 discounted registrations for 100-150.

These are determined by the winning raffle tickets drawn that were handed out at the Welcome Table. Use reference (*Attachment W: TLI Winner Notification Form*) to record the winner’s names, email, and club. This will be sent to the PQD and the District Finance Manager for record keeping purposes.

The Program Quality Director may also choose to have some small Toastmasters door prizes available for raffle ticket winners.

16. Data Collection and Verification

16.1 How to get the data

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

This is one of the most crucial aspects of a TLI. Data collection and verification is how officers get credit towards the Distinguished Club Program requirement for attendance. It was stressed earlier that the helpers at the Welcome Table play an important role in successfully facilitating data collection. Everyone in attendance needs to sign in for each officer role they hold. The sign-in sheets for each officer are collected along with the TLI Slips and they must be thoroughly examined by verifying that each TLI Slip has a corresponding name on the sign-in sheet, and vice versa. As mentioned already, if there is not a TLI Slip for someone who has signed in, they do not get credit for being there. As some future date, the individual will contact the TLI team (most likely the PQD) and question why their club did not receive credit for the TLI training. The PQD, based on the paperwork trail, will address the issue.

17. Data Entry, Recording Results and Record Keeping

17.1 Names, Names, and More Names

Once the verification process is complete, it is time to enter the information into a comprehensive spreadsheet that has formulas already added to tabulate the statistics, (*Attachment U Digital: TLI Results Spreadsheet (user protected -to be released by PQD only)*) As a precaution, always save a copy of the latest version before modifying. If any of the files and formulas become corrupted, you will thank yourself for having the extra saved copy. **This spreadsheet is not to be shared with anyone outside the TLI team!**

There should be 1 tab for every TLI date. Be sure to enable content, and save often! Find the club name on the correct date tab and copy and paste the check for each officer that was in attendance. The formulas calculate the statistics on both the individual tabs and on the summary sheet. When complete, save and send to the PQD. The PQD is responsible for sending this information to Toastmasters World Headquarters for credit.

Keep EVERYTHING in a closed envelope, the manila mailers with the brads work best. All printed documents; a copy of the Agenda, all the sign in sheets including trainers contact sheets, all the TLI Slips and any papers (even handwritten) that were used to help organize the TLI. This entire packet is then given to the PQD.

Note: The 2017-2018 TLI is using a different method for signing in attendees and verifying that they attended both the Education sessions as well as the Officer Break-out Sessions. This makes Sections 14.3, 16 and 17 not applicable.

18. Lessons Learned

- You can never have enough coffee at a morning TLI. Instead of buying expensive coffee or in addition to... bring a coffee pot! The District owns 2 large coffee pots.

District 56 TLI Guide

“Guidelines and Best Practices” (cont’d)

-
- Reserve multiple locations for the same dates and cancel (in a timely manner) which venues are not needed.
 - Always have a plan B! Things are going to happen!
 - Be ready to conduct one of the Breakout Sessions yourself if a trainer cancels unexpectedly.
 - Make time for yourselves. If you are not refreshed, you may not have the best ability to focus.
 - Always ask for help setting up and breaking down the room.
 - Expect at least twice the number of attendees than registered on Eventbrite. Have enough chairs ready and some extra.
 - Plan refreshments wisely. Bring items that can be saved for the next TLI if they are not all consumed.
 - HAVE FUN, be energetic, and be the inspiration and role models for the next TLI Team!

Conclusion

Thank you again for being a valuable member of Toastmasters and committing to serve in a gratifying role that helps to build and maintain quality clubs and helps District 56 achieve its goal. We hope you find the material in this handbook helpful in your journey as a TLI Chair.

TLI Documents- Referenced or Printed Material

TLI Guide Best Practices

Attachments: TLI Documents- Referenced or Printed Material (Getting Started)

- A. "Hold"
- B. Venue Contact Spreadsheet
- C. TLI Tracker Spreadsheet
- D. Officer's Breakout Session files (including Training Manuals and PP slide decks for print)
- E. Agenda Regional Template
- F. Agenda Local Template
- G. Refreshments Coordination list
- H. TLI Refreshments Advice
- I. TLI Slips (for TLI credit)
- J. TLI Breakout Session Evaluation Forms
- K. Facilitator's Breakout Sessions Contact Sheets
- L. Officer Sign in Sheets
- M. Speaker Sign in Sheet
- N. Officer Matrix Handout
- O. **Current** Dignitary List (From D56 website for most current)
- P. **Current** Conference Flier (if available)
- Q. Digital: Basic "Creating A Quality Club" PP
- R. Digital: Basic "DCP Goals" PP
- S. Digital: Basic "Leadership Tools" PP
- T. T.1-T.7 Digital: Trainers Manual and slides PP. All 7 positions.
- U. Digital: TLI Results Spreadsheet (user protected -to be released by PQD only)
- V. Raffle Tickets- out sourced
- W. TLI Raffle Winner Notification Forms
- X. TLI Punch List -To be written

District 56 - Meeting Facilities						Effective Date: 22-Apr-17							
Facility Number	Facility Name	Division	Number	Max	Fee	A/V	Toastmaster Coordinator		Facility Interface			Recent	
			Rooms	Capacity	Required	Available	CONTACT PERSON	EMAIL	PHONE	CONTACT PERSON	EMAIL	PHONE	Notes
			Column3	Column4	Column5	Column52	Column6	Column7	Column8	Column9	Column10	Column11	Column12
100	American General (AIG)	O	???	???	???	???	Elizabeth Stephens	estephens28@yahoo.com	(214)207-1338				
101	Bay Area Christian Church Webster, TX	P	7	120		x	Tracey Peterson	traceymap@gmail.com					
102	Bayland Community Center 6400 Bissonnett	M	Multiple	120	Yes	yes				Bayland CC Director	baylandcc@pct3.com	2016 started not allowing outside org. use - check later.	
103	CenterPoint Energy 1111 Louisiana, Houston, Texas 77002	Q		60	???	???	Carmela Wadding	carmela.wadding@centerpointenergy.com	713)207-5360				
104	College Station Remote TLI -Church	L		45	x	x	Al Flores	tm_aflores@fastmail.fm	(979)739-4428				
105	College Station Remote TLI - Fire Station #6	L	1 room	25 max	x	yes	Bill Bergfeld	wabergfeld@gmail.com					
106	Downtown Library, 500 McKinney St, Houston, TX 77002	O	Multiple	125	x	yes	Cecilia Lee	cecilia.lee@enbridge.com					
107	Fluor, 1 Fluor Daniel Dr, Sugar Land, TX 77478	M	Auditorium/or Private Dining	100	x	yes	John Erford	john_erford@yahoo.com					
108	Lone Star Campus - University park 20515 State Hwy. 249	R	West Dinning	220	Insurance required	yes	Bill Sullivan	sulliva1@comcast.net		Anne-Marie Crabtree	Marie.R.Crabtree@lonestar.edu	281-290-1813	Single meeting rom but large breakout space. Parking is long walk from room. Great Facility.
109	Galveston American National Insurance	P	1 room	45	x	yes	Lisa Harkrider	lisaharkrider2012@gmail.com		Rachel Fuentez	achael.Fuentes@americannational.com		
110	Huntsman Advanced Technology Center (HATC) 8302 New Trails DriveThe Woodlands, TX 77381	N	1 room	50	x	x	Sydney Mark	sydneymark@yahoo.com	832-247-6548				
111	University of Phoenix 24624 Interstate 45 North Spring, TX 77386	?	Multiple	40 - 125		???	Ryan Hampton	Ryan.hampton@phoenix.edu	713-576-3898	Julie Mease	Julie.mease@phoenix.edu	832 667-4520	
112	Leisure Learning Center 2990 Richmond Ave. Houston, TX 77098	M				???				Neal Nations	neal.nations@llu.com	713-529-4414	
113	Mustang-Wood Group Campus 17320 Katy Freeway, Houston, TX 77094	N		60	x	yes	Jim Harrington	jim.harrington@sbcglobal.net	281)827-8731	Mike Adam	mike.adam@mustangeng.com	(832)922-2510	
114	MD Anderson 7455 Fannin Street Houston, TX 77054	Q		120	x	Yes	Kathy Kest & Bill Sullivan	krkest@outlook.com		Brian Grove	BKGrove@mdanderson.org	713-792-8081 © 281-740-3070 281-740-3070	
115	National Oilwell Varco 5200 North Sam Houston Parkway West Houston, TX 77066	?		60	x	yes	Linh Nguyen	lnguyen0301@gmail.com		Robert Leighton	robert.leighton@nov.com	(281)979-9489	
116	National Oilwell Varco 9720 Beechnut Houston, TX 77036	M		100	x	yes	Linh Nguyen	lnguyen0301@gmail.com		Sonia Resendiz	sonia.resendiz@nov.com	713-634-2348	
117	"open"									Beverly Tubbs	Beverly.Tubbs@nov.com		
118	Pappas Bar-B-Que 7007 Hwy. 59 South, Houston, TX, 77074	M		40/75		x				reservation manager		(713) 772-4557	
119	Weekly Community Center 8440 Greenhouse Rd. Cypress, TX 77433	N	Multiple	100	Yes Annual dep.	yes				Dannie Raper	WeekleyCC@Pct3.com	713-274-3161	

District 56 - Meeting Facilities

Effective Date:	22-Apr-17
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[illegible]

Attachment D

Officer's Breakout Session files (including Training Manuals and PP slide decks for print)

Club Officers Training of Roles and Responsibilities

(See separate electronic attachment or links below for the actual files for training.)

Also see this link Video Tutorials on all the Officer roles. (you will be asked to login)

<https://www.toastmasters.org/leadership-central/club-officer-tools/club-officer-tutorials>

1. President
 - a. Link to TI #1313B for download. (press control-left click to activate hyperlink)
 - b. <https://www.toastmasters.org/resources/club-officer-training-president>
2. Vice President Education
 - a. Link to TI #1313C for download.
 - b. <https://www.toastmasters.org/resources/club-officer-training-vpe>
3. Vice President Membership
 - a. Link to TI for Download
 - b. <https://www.toastmasters.org/resources/vice-president-membership>
4. Vice-President Public Relations
 - a. Link to TI for Download
 - b. <https://www.toastmasters.org/resources/club-officer-training-vppr>
5. Secretary
 - a. Link to TI for Download
 - b. <https://www.toastmasters.org/resources/secretary-manual>
6. Treasurer
 - a. Link to TI for download.
 - b. <https://www.toastmasters.org/resources/club-officer-training-treasurer>
7. Sergeant at Arms
 - a. Link to TI for download
 - b. <https://www.toastmasters.org/resources/sergeant-at-arms>



District 56

Serving Southeast Texas

District Director

R.W. (Bill) Sullivan, DTM

Program Quality Director

Sheryle H. Warren, ACS, ALB

Club Growth Director

Kathryn R. Kest, DTM

Public Relations Manager

Marshall Carter, CC, ALB

Administration Manager

Gwen Sullivan, DTM

Finance Manager

Dawn Sandlin, CTM, CL

Immediate Past

Distinguished

District Director

Martha Elias, DTM

Location can be found
on our website

www.tmd56.org

Toastmasters International

www.toastmasters.org

TOASTMASTERS INTERNATIONAL MISSION

We empower individuals to
become more effective
communicators and leaders.

TOASTMASTERS INTERNATIONAL VALUES

Integrity, Respect, Service and
Excellence.

DISTRICT MISSION

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

District 56 2017-2018 Area Director Training MD Anderson 7455 Fannin Houston TX, 77054 Saturday, July 8, 2017 8:00AM – 12:00PM

7:45AM	Registration-	
8:00AM	Call to Order	District Director, R.W. (Bill) Sullivan, DTM
	Call to Order and Pledge Welcome Guests Introduction of Dignitaries	
8:05AM	Introduction of each Attendee	All
8:20AM	District Leadership Manual Area Directors Visits & Reports	Gwen Sullivan., DTM
8:50 AM	Putting on A Good Show Speech Contests	Pamela McCown, DTM
9:30AM	Speech Contest Judge Training Servant Leadership	Richard Kummins, DTM
10:15AM	Being a Good	Club Growth Director Nagaraja Basappa DTM
10:55AM	Announcements and Raffle	TLI Co-Chairs
11:10AM	Break- <u>Visit the Bookstore!</u>	
11:30AM	Officer Break Out Sessions	Sheryle Warren, ACS, ALS Jan Poscovsky, DTM Karen Blake, DTM Pamela McCown, DTM Carol Caraway, DTM Carol Caraway, DTM Steve Jones XXXXXX
	Experienced Club Officers	District Director, Martha Elias, DTM
	For <u>EACH</u> Officer's position held, complete a separate TLI slip.	
12:45PM	Regroup, Closing Comments/Adjourn	District Director, Martha Elias, DTM
	Clean-Up	ALL
	Thank you for your assistance!	

Register for **Spring Conference May 5th and 6th** www.tmd56.org

Keynote by International 2nd Vice President, Deepak Menon, DTM, Business Meeting, Book Store, Speech Contests, Meals and much more!



District 56

Serving Southeast Texas

District Director

Martha Elias, DTM

Program Quality Director

R.W. (Bill) Sullivan, DTM

Club Growth Director

Nagaraja Basappa, DTM

Public Relations Manager

Jun Haan Too, CC

Administration Manager

Soraya Mohammed, DTM

Finance Manager

Rulan Patel, CC, ALB

Immediate Past

District Director

Carol Caraway, DTM

Location can be found
on our website

www.tmd56.org

Toastmasters International

www.toastmasters.org

TOASTMASTERS INTERNATIONAL MISSION

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become more effective
communicators and leaders.

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Integrity, Respect, Service and
Excellence.

DISTRICT MISSION

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

West Regional TLI

Mustang Clydesdale Building

17320 Katy Freeway, Houston, TX 77094

Tuesday - July 5, 2016

6:00 to 8:30

5:30p Registration

James Tomlin, DTM
Max Lopez, CC, CL

6:00p District Director Calls Meeting to Order

Call to Order and Pledge
Welcome Guests
Introduction of Dignitaries

Martha Elias, DTM
Martha Elias, DTM
Bill Sullivan, DTM

6:10p Quality Club & Club Success Session

Creating A Quality Club
Leading the Club to Success

Bill Sullivan, DTM
Connie Spain, ACB, ALS &
Linh Nguyen, DTM

6:45p Educational Session – Quality Speech Contests – Club level

Jody White, DTM

7:00p Club Officer Panel Discussions

President
VPE
VPM
VPPR
Secretary
Treasurer
SAA

Andy Paultanis, DTM
Jim Harrington, DTM
Beatrice Ouezzin, CC, CL
Max Lopez, CC, CL
Jody White, DTM
James Tomlin, DTM
Ruben Colon, ACS, CL

8:15 Announcements: Fall Conference

8:20p Thanks - Program Quality Director & District Director Requests Assistance with Clean-up

8:20 --
8:30 Clean-up and Teardown

TLI

Refreshments Advice

June 30, 2017

Budget for TLI Refreshments:

- During the 2016-2017 Toastmaster year, the budget was calculated using \$1.00 per club officer per training cycle (200 clubs x 2 times per year x 7 officers)
- This budget is attainable following the guidelines outlined below

There are 2 different types of TLI refreshment needs:

- A. TLI's that are held in the evening (usually after working hours)
- B. "Super" TLI's that are held on Saturday morning

How to determine quantity of refreshments:

A. For evening TLI's;

- If TMD 56 officers have been asked to RSVP through "event-brite", usually only 50% of the actual attendees RSVP. Therefore, you should plan refreshments for double.
- There are non-perishable items that can be purchased and available to serve if the refreshments need re-stocking. These are the same items that can (and are) used for the next scheduled TLI if not used.
 - Examples of these type items:
 - Pita chips, crackers, pretzels
 - Mixed nuts, peanuts
 - Goldfish crackers
 - Extra hummus
- **Beverages:**
 - Evening TLI's only need bottles of water. It is always better to have an extra case of water in the car in case attendance is larger than planned.
 - Do not set out excessive amounts of water bottles once the TLI has been underway for 30-45 minutes. If water is still out at the end of the TLI, it will be taken home by the officers instead of being available for the next TLI session.
 - Best value for bottled water is typically at Walmart for 35-36 bottles (16.9 oz.) for \$2.50- \$3.00 (generic brand)
- **Perishables:** All items cost the least when purchased at Aldi's (except cookies see note)
 - For an expected group size of 60-80 officers plan on the following:
 - 2-3 containers of hummus
 - 1-2 bags baby carrots
 - 1-2 bags of celery
 - 4-6 dozen "soft" cookies: The best price for these is Walmart. Look at the end of the bakery aisle for 52 chocolate chip cookies in a paper box for \$5.00. There are also other types of cookies for \$2.00 per dozen
 - 1-2 bags of pretzels, pita chips, etc.
 - Mixed nuts (30 oz.) and peanuts (16 oz.) work well when combined into one serving dish.
 - Fresh seedless grapes 2-3 pounds

TLI

Refreshments Advice

June 30, 2017

B. For “**Super Saturday TLI’s**”

- The Super Saturday TLI’s typically have a higher attendance. However, the RSVP response rate is still only 50%; therefore, plan on food for 2 times the number of RSVP’s.
 - Also, for Saturday TLI’s, stage the refreshments to be set out originally and then refreshed with completely different food items at mid-morning (described in more detail below).
 - For an estimated attendance of 90-125 attendees use the quantities described below.
- **Beverages:** As stated above, best prices for water and juices are Walmart.
 - Juices:
 - orange juice is a must (1-2 containers)
 - some type of diet fruit juice (1 container for diabetics)
 - bring small plastic cups and ice for juice
 - Water:
 - Use same guideline for water as the evening TLI’s.
 - Coffee:
 - TMD56 owns 2 “LARGE” coffee pots that should be used to prepare the coffee.
 - For morning sessions, a small amount of decaf coffee is appreciated (12 – 20 cups are usually sufficient)
 - Folgers medium breakfast blend appears to be liked.
 - When brewing the coffee, use one scoop of coffee for each cup to be brewed
 - Coffee accessories:
 - TMD56 has “hundreds” of coffee cups (and lids) in storage for your use.
 - Check the supplies before purchasing any of the following:
 - Sugar: regular, sweet-n-low and equal
 - Creamer: plain and (1) flavored
 - Stirrer sticks
 - There are some plastic containers in storage that can be utilized to hold the coffee accessories
 - Make sure a dishtowel is placed below where the coffee is poured for spills
 - Make sure there is an empty “trash” bowl for used stirrer, sugar packages, etc.
 - Make sure Coffee is CLEARLY marked (there was a problem once and let’s just say the result was interesting!)
- **First/Breakfast Serving:**
 - Perishables
 - Hard boiled eggs: 3 – 4 dozen, peeled with salt and pepper shaker on table
 - Muffins (bite size) much more economical to make using mix (ALDI’s)
 - 2-3 flavors 5-6 dozen
 - Cheese sticks, individually wrapped about 4 packages worth
 - Fresh fruit:
 - Bananas very popular, but cut in half (4-6 pounds)
 - Grapes or other finger fruit
 - Mixed nuts/peanuts mix (usually 2 jars each for super sessions)

TLI
Refreshments Advice
June 30, 2017

○ **Refresh serving:**

- Perishables
 - 2-3 hummus or substitute I spinach dip
 - Raw veggies (see above)
 - Pita chips, crackers, pretzels, goldfish
 - Cookies

C. Supplies Needed

- Paper plates
 - Buy in bulk 6-inch size (not full size)
- Paper napkins
 - Buy in bulk nice dinner napkins
- Plastic tablecloths: always cover tables with disposable tablecloths
 - You can purchase better quality online at Oriental Trading cheaper than dollar store
 - Black always works as a color
 - Always keep a couple of extra tablecloths in case registration needs them
- Trash bags
 - Always carry some in your supplies, some facilities don't have extras available for our use
 - Always leave facility CLEANER than you found it!
- Serving trays and serving pieces
 - TMD56 has previously purchased a good selection of these and they are in storage. They can be replaced, as needed from the dollar store.
- Cloth napkins
 - Covering a clear plastic tray with colored cloth napkins looks professionally catered and sends the message that the TLI's matter.
- Other
 - Carry pair of scissors and small paring knife, just in case needed. Also, a roll of clear packing tape is useful when least expected.
 - Re-useable ice packs are very handy for transporting perishable items
- Collapsible 2-wheeler to easily move refreshments in and out of training locations



**District 56 Toastmasters
TLI Verification of Club Officer Training**

YOU MUST RETURN THIS CARD TO YOUR SESSION LEADER TO OBTAIN TRAINING CREDIT

**PRINT LEGIBLY.
USE A SEPARATE CARD FOR EACH CLUB IN WHICH YOU SERVE AS AN OFFICER**

Club Name: _____

Your Name: _____

Check all that apply:

PRES ☐ VPE ☐ VPM ☐ VPPR ☐ SEC ☐ TREAS ☐ SAA ☐

Not a Club Officer: ☐

Your signature: _____ **Date:** _____

Please provide phone and email – will only be used to clarify info
(PRINT CLEARLY)

Phone: _____

Email: _____

Please check the box below if you'd like electronic versions of the presentation sent to your email

☐ Presentation title(s): _____



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Not a Club Officer: ☐

Your signature: _____ **Date:** _____

Please provide phone and email – will only be used to clarify info
(PRINT CLEARLY)

Phone: _____

Email: _____

Please check the box below if you'd like electronic versions of the presentation sent to your email

☐ Presentation title(s): _____



Evaluation

Role Evaluated: _____

Trainer: _____

Date: _____

	BEGINNER	INTERMEDIATE	ADVANCED
What level of knowledge of the topic did you have prior to this session?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Indicate to what degree you agree with the following statements about this session.

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
Overall, I was satisfied with the session.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I will use the content to strengthen my club.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The learning objectives were met.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
Will you implement at least one idea from this session in the next 30 days?	<input type="checkbox"/>	<input type="checkbox"/>

Write your comments about the session.

Indicate to what degree you agree that the facilitator demonstrated the following:

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
Solid knowledge of the subject matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Excellent presentation skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Optional
Comments By: _____
Email: _____

TLI Facilitator - Post Training Contact list

Date Trained:		Location:		Training Facilitator:	
Number	Name	Office	Club Name or Number	Email Address	Comments
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TLI Facilitator - Post Training Contact list

Date	Sheet 2				
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District 56
Toastmaster Leadership Institute

Presidents Attendance Sheet

Date: _____

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District 56
Toastmaster Leadership Institute

VPE Attendance Sheet

Date: _____

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District 56
Toastmaster Leadership Institute

VPM Attendance Sheet

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District 56
Toastmaster Leadership Institute

VPPR Attendance Sheet

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District 56
Toastmaster Leadership Institute

Secretary Attendance Sheet

Date: _____

	Name	Email	Club Name / Number
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District 56
Toastmaster Leadership Institute

Treasurer Attendance Sheet

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District 56
Toastmaster Leadership Institute

SAA Attendance Sheet

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District 56
Toastmaster Leadership Institute

Speaker Attendance Sheet

Date: _____

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TOASTMASTERS CLUB OFFICER DUTIES

Club President	VP Education	VP Membership	VP Public Relations	Club Secretary	Club Treasurer	Sergeant at Arms	Immediate Past Club President
Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8
Lead your club by promoting excellence	Plan dynamic club meetings	Build strong club membership	Plan a club public relations program	Maintain accurate membership roster	Prepare and present club budget	Set up meeting room and all equipment	Chair the Nominating Committee
Preside over club meetings	Promote the TI education program	Increase member satisfaction using surveys	Publicize club meetings using flyers, email, media	Record and read meeting minutes	Provide bank signature cards	Greet all guests and members at meetings	Help with Distinguished Club program
Chair executive committee and conduct club business	Orient new members to the program and club. Assign mentors	Chair the Membership Committee (optional)	Produce a club bulletin (Submit to TI for Award) (optional)	Report new officers to TI Headquarters	Notify each club member in writing of dues payable by 4/1 & 10/1	Schedule meeting location and arrange food service (if applicable)	Promote the Club's efforts to become a Distinguished Club
Promote the Distinguished Club & Club Success plans	Attend District-sponsored TLI	Have on hand and understand membership applications	Chair the Public Relations Committee (optional)	Maintain general Club correspondence	Collect payable dues and fees	Collect ballots and tally votes for awards (if no Vote Counter)	Attend and participate in Club Executive Committee
Attend District-sponsored TLI	Arrange for Speechcraft and other S/L programs	Ensure membership applications sent to TI	Write for the company publication (if applicable)	Secure supplies from TI	Issue checks / online payments to TI for Dues	Manage Club assets and supplies	Provide guidance & serve as resource for members
Coach other executive members as required	Arrange for the club to conduct Youth Leadership Programs	Get contact info of guests from guest book	Attend and participate in Club Executive committee	Attend & participate in Club Executive Committee	Attend and participate in Club Executive Committee	Communicate with speakers to see if special setup required	Prepare successor
Attend and vote at Area and District Council Meetings	Encourage members to participate in other TI activities	Attend and participate in in Club Executive Committee	Check District & TMI websites to ensure contact info is correct	Keep Club Charter and Bylaws	Keep complete and accurate records of financial transactions	Attend and participate in Club Executive Committee	
Vote at International Meetings	Administer speech contests Eligibility (Feb & August)	Contact inactive members on a regular basis	Publicize club events: contests, achievements, special programs	Attend District-sponsored TLI	Present verbal and written financial reports to CEC	Introduce guests at beginning of meeting if Presiding Officer does not	
Conduct Club officer elections (May & Nov)	Report educational achievements to TI	Induct new members	Attend District-sponsored TLI	Prepare successor	Submit Club accounts for audit	Ensure that all guests sign guest book	
Confirm all required paperwork sent to TI	Chair Education Committee (if applicable)	Attend District-sponsored TLI	Maintain club website		Pay all club bills promptly	Arrange for a replacement when unable to attend	
Prepare successor	Attend and participate in Club Executive Committee	Prepare successor	Seek opportunities to present TM program		Attend District-sponsored TLI	Attend District-sponsored TLI	
	Preside in the absence of the President		to outside orgs like Rotary, Jaycees		Prepare successor	Chair Social / Reception Committee (optional)	
	Attend and vote at Area and District Council		Prepare successor			Attend District-sponsored TLI	
	Vote at District meetings					Prepare successor	
	Prepare successor						

 <h1>District 56</h1> <h2>Serving Southeast Texas</h2> <h3>2016-2017 Dignitary List</h3>						
	Office	Education Level as of April 2017	First Name	Last Name		
Current Toastmasters International Officers, Directors, Region Advisors						
	Toastmasters International President	Distinguished Toastmaster	Mike	Storkey		
	Toastmasters International President Elect	Distinguished Toastmaster	Balraj	Arunasalam		
	First Vice President	Distinguished Toastmaster	Lark	Doley		
	Second Vice President	Distinguished Toastmaster	Deepak	Menon		
	International Director	Distinguished Toastmaster	David	McCallister		
	Region Advisor 2016-2017	Distinguished Toastmaster	Monnica	Rose		
Past Toastmasters International Officers, Directors, Region Advisors						
	Past International Director	Distinguished Toastmaster	Karen	Blake		
	Past International Director	Distinguished Toastmaster	Pamela	McCown		
	Past International Director	Distinguished Toastmaster	Jean	Riggs		
	Past International Director	Distinguished Toastmaster	Jennifer	Smith		
	Past International Director	Distinguished Toastmaster	John	Shults		
Current District Senior 7 Leaders						
	District Director	Distinguished Toastmaster	Martha	Elias		
	Program Quality Director	Distinguished Toastmaster	Bill	Sullivan		
	Club Growth Director	Distinguished Toastmaster	Nagaraja	Basappa		
	Public Relations Manager	Competent Communicator	Jun Haan	Too		
	District Administration Manager	Distinguished Toastmaster	Shalah Soraya	Mohammed		
	District Finance Manager	Advanced Communicator Bronze , Advanced Leader Bronze	Rulan	Patel		
	Immediate Past Distinguished District Director	Distinguished Toastmaster	Carol	Caraway		
Past District Directors						
	Past Distinguished District Governor	Distinguished Toastmaster	Sheryl	Smith		
	Past Distinguished District Governor	Distinguished Toastmaster	David	Rebeles		

	Past Distinguished District Governor	Distinguished Toastmaster	Jan	Poscovsky		
	Past Distinguished District Governor	Distinguished Toastmaster	Charlie	Pitts		
	Past District Governor	Distinguished Toastmaster	Eddie	Merla		
	Past Distinguished District Governor	Distinguished Toastmaster	Cynthia	St. Dennis		
	Past District Governor	Distinguished Toastmaster	Allen	Prescott		
	Past Distinguished District Governor	Distinguished Toastmaster	Max	Rasquinha		
	Past Distinguished District Governor	Distinguished Toastmaster	Kevin	Smith		
	Past Distinguished District Governor	Distinguished Toastmaster	Marcia	Hudgens		
	Past District Governor	Distinguished Toastmaster	Sharon	Sharp		
	Past District Governor	Distinguished Toastmaster	Mary Ellen	Wilt		
	Past Select Distinguished District Governor	Distinguished Toastmaster	Pat	London		
	Past Distinguished District Governor	Distinguished Toastmaster	Gail	Lover		
Current Division Directors						
	Division L Director	Distinguished Toastmaster	Elly	Hard		
	Division M Director	ATMS, Competent Leader	Keith	Romaine		
	Division N Director	Distinguished Toastmaster	Sydney	Mark		
	Division O Director	Advanced Communicator Gold, Competent Leader	Dorothy	Hudson-Jenkins		
	Division P Director	Advanced Communicator Bronze, Competent Leader	Lisa	Harkrider		
	Division Q Director	Advanced Communicator Bronze, Advanced Leader Bronze	Sheryle	Warren		
	Division R Director	Distinguished Toastmaster	Frank	Jackowski		
Current Area Directors						
	Area L-40 Director	Advanced Communicator Silver, Advanced Leader Bronze	William	Bergfeld		
	Area L-41 Director	Advanced Communicator Silver, Advanced Leader Bronze	Angela	Gott		
	Area L-42 Director	Advanced Communicator Silver , Advanced Leader Bronze	Feyisayo	Bassir		
	Area L-43 Director	Advanced Communicator Silver, Competent Leader	David	Drepaul		
	Area L-44 Director	Advanced Communicator Silver, Advanced Leader Bronze	Don	Beesley		
	Area M-30 Director	Advanced Communicator Bronze , Advanced Leader Bronze	Srimathi	Gopalan		
	Area M-31 Director	Competent Communicator	Kamali	Edwards		
	Area M-32 Director	Competent Communicator, Advanced Leader Bronze	Nicole	Fleming		
	Area M-33 Director	Advanced Communicator Silver, Advanced Leader Bronze	Belinda	Gault		
	Area M-34 Director	Advanced Communicator Silver , Competent Leader	Sarah	Hurst		
	Area M-35 Director	Competent Communicator	John	Erford		
	Area N-20 Director	Competent Communicator, Advanced Leader Bronze	Isaac	Berry		
	Area N-21 Director	Advanced Communicator Gold, Advanced Leader Bronze	Nic	Breen		
	Area N-22 Director	Advanced Communicator Bronze , Advanced Leader Bronze	Robert	Bailey		

	Area N-23 Director	Competent Communicator, Advanced Leader Bronze	Debbie	Mikel		
	Area N-24 Director	Distinguished Toastmaster	Javier	Florez		
	Area N-25 Director	Advanced Communicator Silver, Advanced Leader Bronze	Marcia	Marriott		
	Area O-10 Director	Distinguished Toastmaster	Cecilia	Lee		
	Area O-11 Director	Competent Communicator, Competent Leader	Beatrice	Ouezzin		
	Area O-12 Director	Advanced Communicator Bronze	Anthony	Ally		
	Area O-13 Director	Advanced Communicator Silver, Advanced Leader Bronze	Larry	Caesar		
	Area O-14 Director	Advanced Communicator Gold, Advanced Leader Bronze	David	Prewitt		
Current Area Directors - Continued						
	Area P-01 Director	Advanced Communicator Silver, Advanced Leader Bronze	Maria	Pollard		
	Area P-02 Director	Advanced Communicator Bronze, Advanced Leader Bronze	Bill	McNicoll		
	Area P-03 Director	Advanced Communicator Silver, Advanced Leader Bronze	Sondra	Tennessee		
	Area P-04 Director	Advanced Communicator Bronze, Advanced Leader Bronze	Autry	McMorris		
	Area P-05 Director	Advanced Communicator Gold, Advanced Leader Bronze	Alexey	Koyfman		
	Area Q-50 Director	Advanced Communicator Silver, Advanced Leader Bronze	Cathy	Landry		
	Area Q-51 Director	Competent Communicator, Advanced Leader Bronze	Carolyn	Charney		
	Area Q-52 Director	Competent Communicator, Competent Leader	Anthony	Joseph		
	Area Q-53 Director	Advanced Communicator Gold, Advanced Leader Bronze	Joy	Deaver		
	Area Q-54 Director	Competent Communicator, Competent Leader	Paulette	Gadison		
	Area Q-55 Director	Advanced Communicator Bronze , Advanced Leader Bronze	Ravi	Ponnapalli		
	Area R-60 Director	Advanced Communicator Bronze, Advanced Leader Bronze	Carlos	Ascanio		
	Area R-61 Director	Advanced Communicator Gold, Advanced Leader Bronze	Janis	Ballow		
	Area R-62 Director	Competent Communicator, Competent Leader	Sonia	Resendiz		
	Area R-63 Director	Advanced Communicator Gold, Advanced Leader Bronze	Jennifer	Nelson		
	Area R-64 Director	Advanced Communicator Bronze, Advanced Leader Bronze	Carlos	Carreno		
	Area R-65 Director	Advanced Communicator Silver, Advanced Leader Bronze	Maritza	Ortega		

