



Sustaining Club Success [Oh, The Places You'll Go]



Secretary, Treasurer, and Sergeant At Arms
Fusion Session
Toastmasters Leadership Institute
Summer, 2009

District 3 Toastmasters of Arizona

0:00 – 0:05 (5 minutes)

Welcome Officers to the session

Secretaries – Treasurers – Sgt at Arms

Icebreaker: Depending on group size, go around the room or break into groups and make introductions with the following 3 items:

- Your First Name
- Were you invited as a guest? Or did you go looking for a club?
- Are you a first time (Sec/Trea/SAA) or repeating?

Handouts/Tools Used in this sessions

- Sample Record for Club Minutes
- SAA Check List
- Treasurer Responsibilities & Audit Prep Check List



Remember back when you first joined your club???

I'll never miss a meeting!

I'm going to give a speech every month!

I'll have my DTM in 2 years!



0:05 – 0:08 (2 minutes)

Find out how many of these officers experienced an ideal new member orientation:

- How many of you had someone review the contents of your new member kit with you? (By phone or in person?)
- How many of you had a mentor assigned to you to help prepare your Icebreaker speech?
- How many of you were offered the opportunity to serve on a club committee prior to being asked to take office?
- Of those of you that have earned your Competent Communicator, how many of you had a mentor or advisor in selecting your two free Advanced Manuals?



Have You Accomplished All You Hoped To On Your Goals?

- Have you achieved what you intended to?
- If not, what slowed you down?
- Have your goals changed?
- Have you lost momentum?



0:08 – 0:10 (2 minutes)

When asked “Why did you join Toastmasters” most members will reply “to improve my communication [or leadership] skills.”

However, when probed for a more detailed response, most members will recall that their reasons for joining were much more specific than that.

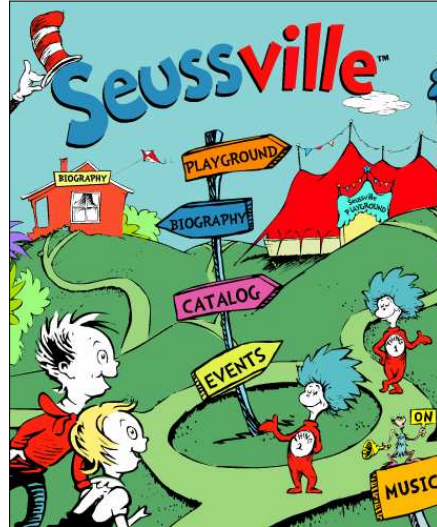
- I joined to give better presentations to senior management
- I joined to learn how not to choke when my boss asked me for a project update
- I joined to broaden my professional network
- I joined to improve my interview skills

What happened with those original specific goals? Did we achieve them and then not define a new goal? Or did we lose sight of them as we became more involved with other club activities?



It's All In Where You Begin

- Sec/Treas/SAA historically are the entry level officer positions
- They include specific tasks that are easily transitioned to first-time officers
- Yet these tasks are crucial to the overall success of the club



0:10 – 0:13 (3 minutes)

You are at a cross-roads in your current officer role.

These roles are the entry point for most new officers. That means you will be responsible for transitioning another new member to a leadership position.

You also are at the foundation for helping your club raise the bar on its overall performance as a club. Clubs that struggle with building or rebuilding often lack strong leaders in their Secretary/Treasurer/SAA roles.

For the next six months you are now in a position to be able to spark a new commitment to excellence in your club.

Starting today, we are promoting all of you to Vice Presidents.



Combined – you three serve as the *VPs of Lasting Impressions*

Treasurer

- Accepts and processes new membership applications
- Ensures club bills/invoices are paid promptly
- Manages club financial status to ensure member needs can be met

Secretary

- Records club and executive minutes
- Records all member achievements
- Maintains the membership roster & verifies new member applications

Sgt at Arms

- Teams with the VPPR to ensure club culture and identity are maintained
- Ensures club meetings have all necessary materials available to conduct effective meetings
- Assists in welcoming guests and new member orientation

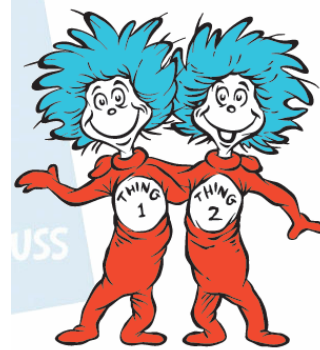
0:13 – 0:15 (2 minutes)

You are really the Vice Presidents of Lasting Impressions –
for guests.....for new members.....for existing members.



'Background Buddies'

- Treasurer sets expectations for receipt of new member kit materials
- Secretary tracks the member progress and ensures contact info remains current for club communications
- SAA helps build relationships and helps orient members to the club culture, traditions, and environment



0:15 – 0:20 (5 minutes)

Don't spend too much time on specific tasks as the Power of 7 session for these officers are Breakouts 3 & 4

Each of you has critical touch points for new members joining your club.

- As Treasurer, you will process the new member application and have the best estimate for when the new kit will arrive to that new member.
- As Secretary, you will have the best opportunity for confirming that the new member application and dues payment has been processed successfully and accurately. You will also be the one who ensures the member is added to the club roster and that the new member contact information is made available to other members. You should also be recording the new member mentor assignments to ensure the mentor receives credit towards their Advanced Communicator Gold (ACG)
- As Sgt at Arms, you set the tone of the meeting by ensuring the meeting environment is conducive to encouraging prospective members to want to join; and conducive to an efficiently run meeting that also members to focus on completion of their communication and leadership projects. Additionally, you offer the most opportunities for new members to becoming involved in the committees that support the various club events.



Your Roles As Launching Points

- SAA → VP Public Relations or VP Membership
 - All three roles include committee leadership
 - VP Membership also includes Area Council responsibilities
- Sec/Treas → VP Membership or VP Education
 - VP Education includes scheduling detail management and educational program mentoring. It also includes Area and District Council responsibilities



- *In addition, these three roles are critical officer transition roles requiring additional lead time*
- *Your leadership skills and quality of transition are key to sustaining the foundations for club success*

0:20 – 0:23 (3 minutes)

With all this experience, you are well positioned to advance to other officer roles.

Thinking back to your original reasons for joining Toastmasters, is there a natural 'next step' to help you towards your goals?

But don't overlook the longer lead time you need to prepare your successors.
(Refer to the session handouts)

- Treasurers should ensure the Club President appoints potential candidates to lead the club audit. Are your financial records current and ready for audit?
- Secretaries should start asking potential candidates to take turns at recording Club meeting minutes. Do you have examples to show them? Also, is there a documented process for adding members to all the various lists and email distributions.
- Sgt at Arms should start asking potential candidates to assist with meeting room setups and breakdowns to become familiar with the materials it takes to run a great meeting. Also, do you have a club setup checklist ready for your successor? And a list of the club supplies needed and how they are obtained? (order, reproduce)



Practice Organizational Skills



- Take a closer look at your duties for logical task groups (i.e., recording minutes)
- Look especially for minor tasks/decisions that are made routinely (i.e., monitoring supplies)
- Identify tasks/duties that can be done more effectively by others (distributions, preparing guest packets)
- Identify tasks/duties that can help groom others for your role (room setups, roster changes, deposits)
- Initiate Operation 'Little Bit' as soon as you return (bit by bit, anything a cinch!)

District 3 Toastmasters of Arizona

0:23 – 0:25 (2 minutes)

This is a great time of year for you to take the lead and determine if there are opportunities for improvement in your areas of responsibility.

Delegation is the leadership skill that appears most frequently on the 'skills to work on' lists of managers. Your roles offer some of the best delegation opportunities of all seven officer roles.

Operation 'Little Bit' was introduced by Past International Director Nancy Starr-Cassidy. Delegation is learning how to ask people to contribute just a 'little bit' by helping with a specific short-term task. When completed, it's easier to ask them to contribute just a 'little bit' more by taking on an additional task. Each time they complete just a 'little bit' more until they've stretched far enough beyond their comfort zone and realize they really are more capable than they might have thought.



Why We Don't Delegate

Have you ever been caught thinking. . .

- They might make mistakes I wouldn't make
- They may dislike me if I assign them too much
- By the time I explain it, I could have it done myself
- They might do the job better and make me look bad



0:25 – 0:30 (5 minutes)

The hardest part of delegation though is in making the decision to let go of a task or activity – it requires trust and sometimes, it also requires allowing someone to do the job differently than you might have done it yourself.

Have a 'what if' roundtable discussion on the above situations:



Steps to Successful Delegation

- Choose the right person
- Make the expectations clear
 - Task to be completed
 - Results expected
 - Timeline for completion
- Establish how/when you want feedback on progress
- Give appropriate authority
- Get the person's agreement
 - Have he/she recap the discussion to you



0:30 – 0:35 (5 minutes)

How do you ensure that when you DO delegate, that the odds for success are improved and not diminished?

Review the steps for successful delegation.



Start Now. . .Groom Your Successor

- Your roles need an even earlier start at finding your successor
- Don't get "bribed" into continuing in your office
- Use CL manual projects to help you find candidates
 - Good listeners (for taking minutes)
 - Attention to detail (for managing budgets)
 - Great topics speakers (good guest 'handlers')
- Use the CL manual to find your successor
 - Hospitality event chairs or committee members
 - Member dues renewals



0:35 – 0:38 (3 minutes)

- If your roles need refining, defining, or documenting.....start immediately.
- Start looking for your successor – look for more than one candidate
- Get them involved! If at all possible, let them be involved in a way that counts toward their Competent Leadership achievement – for example...
 - Befriending a Guest at a Meeting (Project 7)
 - Or any of these for Project 6
 - Helping organize the Club Contest (confirming eligibility, preparing the contest forms, etc.)
 - Helping organize a Club Special Event (Open House) (preparing the guest packets, collecting the visitor cards, etc.)
 - Helping organize a Membership Campaign/Contest



Before We Break

- Parking Lot
- Q&A
- Evaluations

It Takes The Power of Seven



To Lead a Distinguished Club

0:38 – 0:40 (2 minutes)

Review any parking lot items

Assign “Homework” items – what would you like them to take away and what exercise can you “assign” to reinforce that takeaway?

Address or capture any remaining questions (time permitting)

Have participants complete evaluations and leave them in room.

RECORD OF REGULAR MEETING OF CLUB NO. _____

Meeting Date _____ Location _____
 Presiding Officer _____ Recorded By _____

GUESTS & DIGNITATIRES

Guest Name	Invited/Befriended By	Guest Name	Invited/Befriended By

COMMITTEE REPORTS AND OTHER BUSINESS:

FUNCTIONARIES / LEADERSHIP ROLES

Grammarian _____	Toastmaster _____
Ah-Counter _____	Gen Evaluator _____
Timer _____	CL Evaluator _____
Topicsmaster _____	CL Evaluator _____

SPEAKING PROGRAM

Manual Project*	Speaker Name	Title/Topic	Time	Evaluator

*Indicate: Manual Project # and Manual - Competent Communication (CC), Advanced Communication (AC), Competent Leadership (CL)

TABLE TOPICS (Place an * next to any member who received CL credit for their impromptu speech)

Speaker #1 _____	Speaker #5 _____
Speaker #2 _____	Speaker #6 _____
Speaker #3 _____	Speaker #7 _____
Speaker #4 _____	Speaker #8 _____

RECOGNITIONS

Best Topics Spkr _____	Best Evaluator _____
Best Speaker _____	Best Function _____

Sgt at Arms Meeting Checklist

- _____ Arrive at least 30 minutes prior to the start of the meeting
- _____ Ensure the front door to meeting room is open/unlocked
- _____ Ensure tables and chairs are properly arranged
- _____ Ensure water and tea/coffee are made available (if appropriate)
- _____ Check the room temperature and adjust if necessary
- _____ Position signage or sandwich boards outside entrance
- _____ Arrange/Prepare guest sign-in table
 - Visitor Cards (or guest book) and Name Badges
 - Guest welcome packets with club information and a copy of *The Toastmaster* magazine
 - Other Toastmasters literature, as available
 - Special District announcements/flyers, as available
- _____ Arrange/Prepare Member sign-in table
 - Name Badges or Name Tents
 - Meeting agendas
- _____ Position the lectern at the front of the room
- _____ Place gavel on lectern
- _____ Hang the club banner in the front of the room
- _____ Display the American flag at the front of the room (if pledge is given)
- _____ Set up timing lights/cards and stopwatch at rear of room
- _____ Place ballots and evaluation forms at each seat
- _____ Prepare awards/award cards/ribbons for Ballot Counter
- _____ Give word of the day cards to Wordmaster
- _____ Give bell/clicker to the Ah-Counter
- _____ SMILE – Welcome guests and members

Contents of Guest and New Member Packets

Guest

1. Toastmaster Magazine
2. Form 400 (Application)
3. Your Membership Provides Flyer
4. Club Informational Brochure
5. Sample Agenda
6. Sample Evaluation Form
7. Description of Meeting Functionary Roles

New Member

1. Welcome Letter
2. Icebreaker Speech Project
3. Sample Agenda
4. Sample Evaluation Form
5. Benefits Sheet

Contents of the Meeting Supply Box Specify quantities to be kept on hand

- Spare timing light bulbs (red, yellow, and green)
- Timing Cards (backup)
- Gavel
- Timing Bell
- Word of the Day Cards
- Ah Bell or Clicker
- Award certificates (order in sets of 10) – keep 2 pkgs on hand
 - Best Speaker (Item 602BS)
 - Best Topics Speaker (Item 602BTT)
 - Best Evaluator (Item 602 BE)
 - Best Leadership Functionary (from our template)
- Speech Evaluation Forms - 1 per speaker per person (Item 162)
(@ 3 speakers per mtg & 20 members = 60 per meeting)
- Voting Ballots - 1 per person, approx 25 per meeting (from our template)
- Timing Sheet – 1 per meeting for the timer (from our template)
- Ah Counter / Grammarian Tally Sheet – 1 per meeting for the Ah=Counter/Grammarian (from our template)
- Blank Agendas – keep 50 on hand (from our template)
- Form 400 Membership Applications – keep 40 on hand (Item 400 or download the PDF version for clubs assigned to Districts from www.toastmasters.org)
- Copies of *The Toastmaster* magazine – ask members to donate old issues regularly
- Pre-made Guest Packets – Keep 15 on hand, replenish after each meeting
- Pre-made New Member Packets – Keep 10 on hand, replenish after each meeting
- Other Toastmasters Marketing Brochures (as available)

Free Materials to Order Every 6 months From Toastmasters International (Often available from the District Resource Room “Free Stuff” Table)

- Item 101F: Confidence. The Voice of Leadership
- Item 354F: Your membership Provides Fliers
- Item 99F: Find Your Voice

The Responsibilities of the Club Treasurer	Items for Audit	Item #
<p>The Treasurer is responsible for keeping clear and accurate financial records of Club business, including dues received from members and paid to Toastmasters International’s World Headquarters, and for seeing that the Club remains financially stable.</p>	<p>Membership Roster & Record of Dues (Download Current Membership report from WHQ)</p>	<p>1</p>
<p>Specific responsibilities include:</p> <ul style="list-style-type: none"> ○ Prepare and maintain the Club annual budget ○ Ensure new signature cards are delivered to the bank following Club officer transitions ○ Pay all bills and approved expense reports promptly ○ Process new member applications online within 48 hrs 	<p>Cash Receipts and Disbursements Journal (Ledger or checkbook record)</p>	<p>2</p>
<ul style="list-style-type: none"> ○ Prepare and distribute member dues statements by August 15 / February 1 for dues renewals periods ○ Collect payable dues and fees; Make semiannual dues payments to WHQ online using club debit card ○ Present a verbal and written financial report quarterly to the club membership 	<p>Approved Club Budget & Quarterly Reports to Club Membership</p>	<p>3</p>
<ul style="list-style-type: none"> ○ Maintain the Club’s Employer ID Number (Available online in the Club Business records) ○ Respond to IRS or other government agency inquiries; submit the annual 990/990T federal forms with the IRS where applicable ○ Be familiar with policies on fund-raising ○ Keep complete and accurate records of all Club financial transactions & Submit for audit ○ Attend Club Executive Committee meetings 	<p>Club Dues Renewals (Dues Renewals Record or Confirmation of Online Renewals Payments)</p>	<p>4</p>
<p>Key Checklists & Dates</p> <ul style="list-style-type: none"> ○ Jul/Jan: Prepare the Club budget based on expense estimates from Club officers ○ Aug/Feb: Present the Club budget for membership approval ; Distribute member dues statements ○ Sep/Mar: Work with President to collect semiannual dues and update membership report due to WHQ by October 1 (Fall) or April 1 (Spring) ○ Oct/Apr: Verify Club’s Dues Renewal Status online at WHQ ○ Nov/May: Submit all Club financial records to the Audit Committee ○ Dec/Jun: Receive Audit report; Report estimated-to-actual Club expenditures to membership 	<p>New Member Forms & Payment Records (Including confirmation receipt from Toastmasters International)</p>	<p>5</p>
	<p>Club Quarterly Financial Statements (Toastmasters International)</p>	<p>6</p>
	<p>Bank Statements</p>	<p>7</p>