

T O A S T M A S T E R S I N T E R N A T I O N A L



When You Are the
Treasurer

A Guide to
Effective Club
Leadership

2008-2009

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When You Are the Treasurer

A Guide to Effective Club Leadership

TOASTMASTERS INTERNATIONAL

P.O. Box 9052

Mission Viejo, CA 92690

Phone: 949-858-8255 Fax: 949-858-1207

members.toastmasters.org

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The Mission of the Club

The mission of a Toastmasters club is to provide a mutually supportive and positive learning environment in which every individual member has the opportunity to develop oral communication and leadership skills, which in turn foster self-confidence and personal growth.

The Mission of Toastmasters International

Toastmasters International is the leading movement devoted to making effective oral communication a worldwide reality.

Through its member clubs, Toastmasters International helps men and women learn the arts of speaking, listening and thinking – vital skills that promote self-actualization, enhance leadership potential, foster human understanding and contribute to the betterment of mankind.

It is basic to this mission that Toastmasters International continually expand its worldwide network of clubs, thereby offering ever-greater numbers of people the opportunity to benefit from its programs.



Being a Toastmaster means more than simply making a commitment to self-development. Everyone who joins a Toastmasters club is making a commitment to the club, to its members and to the organization as a whole.

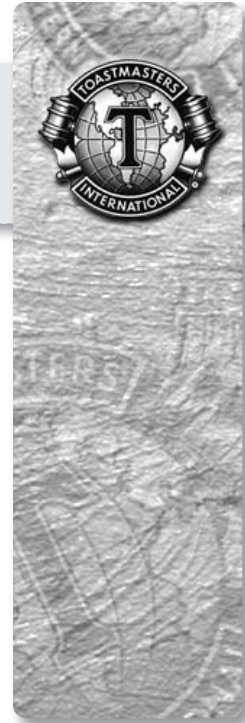
A Toastmaster's Promise

As a member of Toastmasters International and my club, I promise...

- To attend club meetings regularly;
- To prepare all of my speech and leadership projects to the best of my ability, basing them on projects in the *Competent Communication*, *Advanced Communication* or *Competent Leadership* manuals;
- To prepare for and fulfill meeting assignments;
- To provide fellow members with helpful, constructive evaluations;
- To help the club maintain the positive, friendly environment necessary for all members to learn and grow;
- To serve my club as an officer when called upon to do so;
- To treat my fellow club members and our guests with respect and courtesy;
- To bring guests to club meetings so they can see the benefits Toastmasters membership offers;
- To adhere to the guidelines and rules for all Toastmasters educational and recognition programs;
- To maintain honest and highly ethical standards during the conduct of all Toastmasters activities.



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You Are the Treasurer



As treasurer, you are responsible for keeping clear and accurate financial records of club business and for seeing that the club remains financially stable.

This office has many responsibilities, yet it also has many rewards. During your term you will have the opportunity to develop and practice leadership skills that you can use in all areas of your life. You will learn to set goals, plan, develop strategies and recognize people for their efforts. These skills will be discussed in detail later in this book.

As a member of the executive committee, you are a part of a team that consists of the president, vice president education, vice president membership, vice president public relations, secretary, sergeant at arms and immediate past president. Brief explanations of their duties are in the appendix. The executive committee is responsible for making your club dynamic and enjoyable for all members and for seeing that the club is a Distinguished Club. You can accomplish this through regular, productive executive committee meetings and through careful goal setting, planning and monitoring of progress.

As you plan your term, activities and goals, remember that a Toastmasters club is a volunteer organization. Like any volunteer organization, its funds are limited. Members who volunteer for office may not be reimbursed for many of the expenses they incur while serving in that office, including, but not limited to, expenses related to phone usage and mileage. Any expenditures for which you want reimbursement must be authorized in advance by the club and supported by receipts or other documentation.

This manual contains all the basic information you need to fulfill the role of treasurer. In it you'll find:

- a brief outline of the standards for the treasurer
- detailed explanations of how to meet these standards
- leadership techniques you can use to meet these standards
- the tools and resources available to ensure a successful term of office and a successful club (in the appendix)

This manual will be invaluable to you throughout your office term. However, it should not be your only resource. Throughout the manual are references to other materials you'll want to have on hand. A complete list of these materials appears in the appendix along with an order form. The Calendar/Checklist on page 15 will be especially helpful to you. It lists by month the activities and events you should be addressing. The club officer training programs conducted by your district, which are discussed below, also are invaluable.

Standards for Success



Each club officer must meet performance standards. Following is a brief outline of your standards as treasurer.

Outside of the Club Meeting

1. Prepare a budget to be approved by the executive committee and membership within one month of taking office.
2. Provide the bank with a new signature card by July 1/January 1.
3. Prepare and send dues statements by August 15/February 15.
4. Collect and pay dues to World Headquarters by October 1 and April 1, and work with the vice president membership to contact members who have not paid dues. Pay dues online by going to www.toastmasters.org.
5. Submit new member applications and dues to World Headquarters within 48 hours after receipt. Add new members online.
6. Pay bills as due.
7. Keep records of all financial transactions.
8. Present verbal and written financial reports to the executive committee quarterly (October 15, January 15, April 15, and July 15).
9. Submit club accounts for audit.
10. Attend club executive committee meetings.
11. Attend district-sponsored club officer training.
12. Arrange for a replacement if unable to attend a meeting.
13. Prepare successor for office.

At the Club Meeting

1. Receive completed new member applications and dues.
2. Announce when dues are due and explain dues structure.
3. Greet members and guests.

Now that you're familiar with your standards, let us study them more closely.

Club Officer Training

Every summer (June, July and August) and winter (December, January and February) your district conducts club officer training. These programs include a review of each officer's responsibilities and tips for fulfilling them. The programs allow you to meet officers from other clubs and provide an opportunity to share ideas and keep up on current information. You should make every effort to attend. Contact your district lieutenant governor education and training for information about the next program.

Prepare a Budget

A budget is a financial plan and it's essential that your club have one.

At the beginning of your term, work with the club president and executive committee to develop a budget for the club year, to be approved by the executive committee and membership within one month of taking office (August 1 for clubs electing annually or semiannually), and February 1 (for clubs electing semiannually).

Typical expenses included in a club budget are:

- Preparation of the club newsletter or expense for a Web server
- Trophies/ribbons/certificates
- Administrative supplies

- Promotional material (brochures, posters, etc.)
- Educational material (Success/Leadership programs, manuals, etc.)
- Speech contest material (rulebooks, ballots, etc.)
- Postage
- Special events (banquets, etc.)
- Membership dues to World Headquarters

Typical revenues included in a club budget are:

- Member dues
- Donations
- Fund-raising

Toastmasters Fundraising Policy

From time to time, clubs may conduct fundraising activities to offset costs for educational sessions and to raise funds to further the purpose of Toastmasters International. Toastmasters International is an educational organization and not a service club such as Lions, Kiwanis, Rotary, etc., whose main focus is to raise funds for community or charitable causes. Before you start on your fundraising project, answer these questions:

1. Is the product or service rendered by individual members donated or voluntary?
2. Is it the club, rather than individual members, that is receiving monetary compensation?
3. Is at least one-third of the club's total financial support from member dues?
4. Will the profits be used to further Toastmasters International's tax-exempt purpose, which includes:
 - building and improving clubs;
 - training club and district officers;
 - purchasing educational program materials;
 - sending a voting delegate to official district conferences or the international convention;
 - covering general administrative expenses connected with the operation of the club or district?
5. Is the fundraising activity legal in the club's city, state, province or country?

If you answered "no" to any of these questions, the fundraising activity is prohibited.

Acceptable Fund-Raising Activities

Acceptable fundraising activities are:

- Conducting Speechcraft, Success/Communication, or Success/ Leadership programs and charging a fee to the participants.

Fees charged should be reasonable. The revenue should be used to buy the program material. Any excess funds are to be used to further the purpose of Toastmasters International as stated above.
- Holding a raffle, auction, white elephant sale or bazaar of donated goods at a club, area, division or district function, where permitted under local law.
- Accepting advertising in club and district newsletters.

The revenue should be used to offset the cost of producing and/or mailing the publication. Any excess funds are to be used to further the purpose of Toastmasters International as stated above.
- Selling entertainment books or diner's books.

Unacceptable Fundraising Activities

Unacceptable fundraising activities are:

- Buying items and then selling them, other than entertainment or diner's books.
- Raising funds for social events.
- Raising funds to donate to a worthy cause.
- Raising money to set up a fund, such as a scholarship or educational fund.
- Raising money to support a campaign for a candidate at any level of the organization or outside the organization.
- Holding or participating in sporting or other physical events, such as tennis or golf tournaments, walk-a-thons, or jog-a-thons.
- Holding pancake breakfasts, fireworks displays or picnics.

Fund-raising activities, including those listed above, which have a higher risk of injury are not permitted.

Liability. Toastmasters International is covered by liability insurance for injury occurring within a Toastmasters

meeting. Because of our low risk, our premium is minimal. If claims were to increase, our premiums would rise sharply. This could cause the organization to raise membership dues in order to cover the additional premium.

Income Tax. The Internal Revenue Service (IRS) has certain requirements that must be met by clubs within the United States if revenue exceeds established amounts. These requirements are:

- A Federal Form 990 must be filed with the IRS if gross income, including revenue from fundraising, exceeds \$25,000 within one year.
- A Federal Form 990T must be filed with the IRS if gross income exceeds \$1,000 on unrelated business income, such as advertising in the club newsletter. This income could be subject to tax.

Your club is responsible for determining your state's filing requirement and to file proper form(s) when appropriate. All clubs outside the United States should consult a tax advisor to ascertain their governing regulations. Failure to file the required forms by a club can result in revocation of a club's charter.

When planning your budget, refer to the financial records from previous years for guidance. Present the budget to the executive committee for approval, then to the membership for adoption.

Provide the Bank with a New Signature Card

Each club should have a club bank account. Club funds should never be co-mingled with an individual's funds.

Before you may begin writing checks on the club's account, you must provide the bank with a new signature card that has been signed by you and the club president. Ask your bank for the proper form, and return it to the bank by July 1 (for clubs electing annually or semiannually) and January 1 (for clubs electing semiannually). Advise the bank that Toastmasters International is a non-profit, tax-exempt organization. Some banks will waive their fees.

If your bank requires an Employer's Identification Number (U.S. only) for your club account and you are not sure what the number is, contact the Finance Department at World Headquarters and the staff will assist you.

Prepare and Send Dues Statements

Twice each year your club must submit \$27.00 dues (\$21.00 dues for clubs not assigned to districts) to World Headquarters for each member of your club. Dues are due at World Headquarters on or before October 1 and April 1. You are responsible for notifying members when dues are due. The club president will receive the dues renewal invoice in September and March; begin collecting the dues before then. By August 15 and February 15, provide each member with a statement showing the money due. The statement should cover the \$27.00 (\$21.00 for clubs not assigned to districts) due World Headquarters, plus whatever fees charged by the club. Indicate on the statement that checks are payable to the club.

Send a reminder several weeks later to those members who have not yet paid the club. Also make announcements during club meetings. Follow-up by telephone, if necessary.

Collect and Send Dues to World Headquarters

When members pay their dues, give them a receipt. Regularly deposit these payments into the club's bank account.

Your club president will receive the dues renewal invoice from World Headquarters in September and March. Help the president, the vice president membership and the club secretary complete the invoice based on your record of payments received. An accurate membership report is important. Accidentally omitting someone from the list who did indeed pay dues jeopardizes that person's eligibility for educational awards, speech contests and holding office. That person also will no longer receive *The Toastmaster* magazine.

Be careful about sending dues for people who have not paid the club. If these people don't renew their membership, your club loses money. Dues are non-refundable and non-transferable.

When the dues renewal invoice is completed, the renewal can be submitted online if paying by credit card. Your club will receive an acknowledgement of receipt if paying by this method. If paying by check, make it payable to Toastmasters International or provide credit card information (one credit card per report, please) for the dues being submitted. Checks must be in United States funds and written on a U.S. bank. Make a photocopy for your records. World Headquarters must receive the reports by October 1 and April 1 respectively.

Please choose one method of payment. For example, if you pay your club dues online, do not send another copy to WHQ by mail. Sending duplicates slows down processing, which results in slower service to members.

If members pay their dues after the report has been submitted, pay those members online with a credit card or send a check to Toastmasters International by mail. Include the following:

1. The names and addresses of the members for whom you are paying dues
2. A statement that these are continuing members who paid their dues after the dues renewal was submitted.

We do not recommend sending credit card information via e-mail because e-mail is not secure. Please submit via one method only to avoid duplication. Any checks returned by the bank will be the club's responsibility.

Submit New Member Applications and Dues to World Headquarters

Reinstated, dual or transferred memberships cannot be added online. They will have to be either faxed or mailed to WHQ. However, when you receive dues and fees from new members, add your new members online. This will result in shipment of the new member kit within 48 hours. If paying by check, make check payable to Toastmasters International, as indicated on the Application for Membership (Form 400). The fastest way

to sign up new members is to submit them online using credit card payment. If paying by check, send the Application for Membership to World Headquarters within 48 hours after receipt. Be sure to put your club and district numbers on all checks to Toastmasters International and remember payment must be in U.S. funds.

Do not enclose new member dues and applications with the dues renewal. In order to keep its charter in good standing, your Toastmasters club must maintain a minimum level of six members, at least three of whom were members of the club during the last renewal period.

Pay Bills as Due

All mailings regarding club finances, including the monthly statements, will be sent to the club president with instructions to give the statements to you, the treasurer. If additional money is due, it's payable immediately.

Individual member accounts are set up only for supply orders. All transactions dealing with member dues will appear on your club's account. If you have any questions about your club's account, contact the Finance Department at World Headquarters.

When your club receives bills from World Headquarters or other vendors, you and the club president should review each bill for accuracy and then authorize payment by initialing and dating the invoice (see sample statement in appendix). Pay all bills promptly by check or credit card so you have a record of all transactions. After payment by check, write the check number and date on the invoice and file it in a paid-bills file.

Payment for recurring bills, such as for meals and meeting place, may be authorized in advance by the executive committee and should be paid immediately.

Keep Records of All Financial Transactions

Clear, complete, accurate records are crucial to the financial health of your club. Each month, reconcile deposits, expenditures and cash on hand (see sample in appendix). The club checking account record can help you do this.

The Internal Revenue Service has certain requirements that must be met by clubs within the United States if revenue (from all sources of income, including fundraising) exceeds established amounts. These requirements are:

- A Federal Form 990T must be filed with the IRS if gross income (total monies received) exceeds \$1,000 on unrelated business income, such as advertising in club or district bulletins. This income could be subject to tax. Failure to file the required forms by a club can result in revocation of a club's charter.

It's up to the individual clubs to determine their state's filing requirements and to file proper form(s) when appropriate. Clubs outside the United States should consult a tax advisor to ascertain their governing regulations.

Since Toastmasters International is a nonprofit organization, do not file income tax reports (in the U.S.) unless your club income is greater than \$25,000 during the year. The IRS has requested that if a club receives a Form 990 with a pre-addressed label, the club should file a return even if it is not required to do so. Per the IRS instructions for the 990 and 990EZ, a club should:

- Verify the Taxpayer ID number listed on the label.
- Attach the label to the name and address space on the return.
- Check box 'K' in the heading of the Form 990 or 990EZ to indicate that the organization's gross receipts are normally not more than \$25,000.
- Have a club officer sign the return.
- Send it to the Ogden Service Center.
- **Note:** The club does not have to complete Parts I through X of the Form 990, or Parts I through V of the Form 990EZ.

Present Financial Reports

As treasurer, you must keep the club's officers and membership apprised of the club's finances. At the first meeting of each month, present to the club a verbal report, and give a written copy to the executive committee. Your report should include the names of any members delinquent in dues payment.

Submit Club Accounts for Audit

The incoming treasurer should make it standard procedure to see that the club treasury is being handled in a businesslike manner. The incoming treasurer should insist on an audit before taking over the responsibility of the office. The audit can be an informal review by an audit committee, appointed by the president.

Just before the end of your term of office, be sure to have the following items in order for the audit committee:

1. Checkbook register
2. Bank statements and cancelled checks
3. Cash book and journal
4. Paid bills
5. Deposit slips
6. Copy of monthly financial statements
7. Any other material requested by the committee.

Attend Club Executive Committee Meetings

As a member of the executive committee, one of your responsibilities is to ensure the club is functioning well and is helping members in their self-development efforts.

Arrange for a Replacement

Occasionally you may be unable to attend a club meeting. On such occasions, you should arrange for someone – perhaps another club officer – to carry out your duties.

Prepare Your Successor for Office

Once your successor is elected, help him/her to assume leadership. Make sure the newly elected treasurer has a manual, review the standards for the office of treasurer, and remind him or her to attend district-sponsored training programs. Discuss any unfinished business, turn over any files you may have and offer advice or information the incoming officer may find helpful.

The Distinguished Club Program/Club Success Plan



As treasurer, you have an active role in the club's plan to achieve Distinguished Club Program goals and ensure the club is a Distinguished Club. The purpose of your Toastmasters club is to provide the environment in which members learn speaking and leadership skills. The Distinguished Club Program/Club Success Plan helps your club accomplish its purpose by focusing on two areas:

- **Educational Awards.** The number of Toastmasters awards issued to your members determines your club's success in helping its members improve their communication and leadership skills.
- **Membership.** A club should have at least 20 members. Membership turnover is unavoidable. Your club should strive to bring in new members to combat this turnover, to provide a stronger leadership base and to bring a flow of fresh, new ideas and personalities.

How It Works

The Distinguished Club Program/Club Success Plan is an annual program, running from July 1 through June 30. The program booklet (Item 1111) is sent to club presidents each May with the club officer manuals and is available for downloading from the Toastmasters International Web site. The program consists of 10 goals your club should strive to achieve during this time using the Club Success Plan as a guide. World Headquarters tracks the progress of your club and recognizes your club based on the number of goals achieved and the number of members it has.

Goals to Achieve

To be eligible for recognition, your club must meet a membership requirement. At year-end (June 30) it must have:

- at least 20 members OR
- a net growth of at least five new members.

It also must achieve other goals:

1. Two CCs
2. Two more CCs
3. One ACB, ACS or ACG
4. One more ACB, ACS or ACG
5. One CL, ALB, ALS or DTM
6. One more CL, ALB, ALS or DTM
7. Four new members
8. Four more new members
9. Minimum of four club officers trained during each of two training periods
10. One dues renewal report and one club officer list submitted on time

Recognition

Clubs that meet the membership requirement and also do the following are eligible for Toastmasters International recognition at year-end:

RECOGNITION EARNED

- | | |
|---------------------------|--------------------------------|
| Achieve five of 10 goals | Distinguished Club |
| Achieve seven of 10 goals | Select Distinguished Club |
| Achieve nine of 10 goals | President's Distinguished Club |

If the club earns recognition as a Distinguished, Select Distinguished or President's Distinguished Club, World Headquarters will send the president an attractive ribbon for display on the club banner and a congratulatory letter. The ribbon and letter will be included with the

year-end report. The club's officers will also be invited to attend the Club Leadership Luncheon held during the international convention in August, where they will be recognized for the club's achievement.

Progress Reports

Club presidents will receive progress reports in October, January and April. The report will show membership base, current membership, and progress toward the 10 goals. Following the June 30 close date, and after all data received has been processed, club presidents will be sent a year-end report showing how the club did and any recognition it earned. Updates are posted weekly on the Toastmasters International Web site, members.toastmasters.org.

The Club Success Plan

Think about what makes a business or organization successful. The answer is planning. Its leaders set goals and develop plans to achieve those goals. They establish strategies to use in their efforts and monitor progress as they employ these strategies, altering plans, and strategies as necessary.

Your club can also succeed and earn recognition if it begins work immediately and implements the Club Success Plan. The plan has several features your club will find helpful. It:

- Helps your club to determine how it is going to meet the 10 established goals,
- Allows it to establish additional goals of its own,
- Outlines strategies for achieving the goals,
- Identifies resources your club may use in its efforts, and
- Has space for you to write in assignments, develop a timetable, and track accomplishments.

Steps to Success

To achieve its goal to be a Distinguished Club your club's officers should do the following:

- Meet immediately after they are elected to study and use the Club Success Plan to set goals for their term of office.
- Form committees to help them accomplish goals.
- Periodically review the goals and timetables to insure the plan is being followed according to schedule.
- Compare the club's accomplishments to those shown on the quarterly printed reports from World Headquarters or on the reports on the Toastmasters International Web site. If there are any discrepancies, the club should investigate.
- Note the club's accomplishments at year-end in the appropriate column and review the plan for accuracy, then give the entire plan and any comments or suggestions for improvement to incoming club officers. The plan serves as an administrative record of the club for the year and as a guide for officers in the coming year.

Twice each year the area governor will visit your club. During these visits he or she may ask to review your club's plan. Be prepared to discuss your club's progress. The area governor may be able to assist with any problems or give tips for achieving goals.

Credit Toward the Advanced Leader Bronze Award

The Advanced Leader Bronze award recognizes members for their leadership activities within the club. One of the requirements for this award is that the member serve as a club officer (club president, vice president education, vice president membership, vice president public relations, secretary, treasurer, or sergeant at arms) and participate in the preparation of the Club Success Plan while serving as an officer. By preparing and completing the plan you and your club's officers will be earning credit toward this award.

Your Leadership Opportunity



As treasurer, you are also a club leader. One of your responsibilities is to influence and inspire members. This is a terrific opportunity for you to develop and enhance your leadership skills while serving your club.

Successful leaders:

Set goals. As a member of your club's executive committee, you work with the committee to establish goals for the term.

Plan how to accomplish goals. Once goals are established, leaders draw up a plan of action to accomplish the goals. They break a big goal into smaller goals. Then they develop strategies and timetables from which to work.

Delegate. Leaders aren't afraid to release control and give responsibility to others.

Monitor progress. Leaders track progress toward goals and make alterations as necessary.

Recognize achievement. Leaders reward those team members who perform well. The reward isn't necessarily tangible – a "thank you," congratulations, or a smile will often suffice. Make a point to personally congratulate members who achieve and see that an announcement is made during a club meeting.

As you lead, remember these tips:

- A good leader cares about his/her work and team members.
- A good leader is enthusiastic.
- A good leader is dedicated.

Leadership Opportunities Beyond the Club

Your club is only one place in which to develop and practice leadership skills. Toastmasters International has other leadership development opportunities, too. You can serve as an area governor or division governor in your district, helping clubs to function effectively. You can even become public relations officer, lieutenant governor marketing, lieutenant governor education and training, or district governor. Service in these district positions provides the opportunity to learn new skills and to work with a variety of people all concerned with achieving common goals. Eventually you could be elected to the Toastmasters International Board of Directors and maybe even to the presidency of our organization. The possibilities are endless.

Treasurer Calendar/Checklist



The following calendar/checklist shows by month the activities and events you should be addressing. You may use the blank lines to add items.

June

Before taking office in July, you should:

- Attend district-sponsored club officer training program
- Meet with outgoing executive committee and obtain files from outgoing treasurer
- Meet with executive committee to complete Club Success Plan
- Work with executive committee to develop club budget
- Review TI Catalog and order materials
- Obtain treasurer manual from incoming president and read it
- Provide bank with a new signature card
- _____
- _____

July

- Attend district-sponsored club officer training program if you didn't attend in June
- Finalize budget and obtain approval from executive committee
- Present budget to club for approval
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Present oral financial report to club
- Pay bills
- _____
- _____

August

- Attend district-sponsored club officer training program if you didn't attend in June or July
- Prepare and send dues statements to members by August 15
- Begin collecting dues
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- _____
- _____

September

- Collect dues
- Work with president, vice president membership, and secretary to prepare dues renewal. Dues must be at World Headquarters by October 1
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- _____
- _____

October

- Make sure dues are received at World Headquarters by October 1
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Present oral financial report to club
- Pay bills
- _____
- _____

November

- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- If club elects semiannually, prepare club accounts for audit
- If club elects semiannually, prepare to give files and manual to incoming treasurer
- Pay bills
- _____
- _____

December

- Attend district-sponsored club officer training program
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- If club elects semiannually, meet with incoming executive committee and give files and manual to newly elected treasurer. Help prepare new treasurer for office

If the club elects semiannually, the incoming treasurer should:

- Attend district-sponsored club officer training program
- Provide bank with new signature card
- Work with incoming executive committee to develop club budget
- Read treasurer manual
- _____
- _____

January

- Attend district-sponsored club officer training program if you didn't attend in December
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Present oral financial report to club
- Pay bills
- If club elects semiannually, incoming treasurer finalizes budget and obtains approval from executive committee
- If club elects semiannually, incoming treasurer presents budget to club for approval
- _____
- _____

February

- Attend district-sponsored club officer training program if you didn't attend in December or January
- Prepare and send dues statements to members by February 15
- Begin collecting dues
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- _____
- _____

March

- Collect dues
- Work with president, vice president membership, and secretary to prepare dues renewal. Dues must be at World Headquarters by April 1
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- _____
- _____

April

- Make sure dues are received at World Headquarters by April 1
- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written and oral treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Present oral financial report to club
- Pay bills
- _____
- _____

May

- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting and present written treasurer's report
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- Prepare club accounts for audit
- Prepare to give files to newly elected treasurer
- _____
- _____

June

- Submit new member dues and Applications for Membership to World Headquarters
- Attend executive committee meeting
- Reconcile deposits, expenditures, and cash on hand
- Pay bills
- Meet with incoming executive committee and give files to newly elected treasurer. Help prepare new treasurer for office
- _____
- _____

Toastmasters International World Headquarters



Toastmasters International's World Headquarters provides materials and assistance to clubs and districts around the world. Should you have questions or need help, use the information below to e-mail your questions to the appropriate department.

Donna H. Groh, Executive Director

Diana Metcalfe, Executive Assistant dmetcalfe@toastmasters.org
Board of Directors
Past international presidents and directors
Presidential citations
Trademarks/copyrights trademarks@toastmasters.org

OPERATIONS AND ADMINISTRATION DIVISION

Nancy L. Langton, Director

Administration Department

Cindy Mount, Executive Assistant cmount@toastmasters.org
International officer and director candidates
Policy administration
Club, district and international bylaws clubbylaws@toastmasters.org
International convention conventionregistration@toastmasters.org

Member Services Department

Darci Maenpa, Manager

Address changes addresschanges@toastmasters.org
Club elections clubbylaws@toastmasters.org
Club coach program clubcoach@toastmasters.org
Club meeting place and time clubofficers@toastmasters.org
Officer lists/changes/questions
Regional/International proxies and voting duplicateproxies@toastmasters.org
Education awards educationawards@toastmasters.org
Requirements
Applications
Password requests lostpassword@toastmasters.org
New member applications membership@toastmasters.org
Distinguished Club Program
Membership building contests

Membership awards
Club operations/club meetings
Youth Leadership
Gavel clubs. newclubs@toastmasters.org
New clubs/questions
Sponsors/mentors
Dues renewals. renewals@toastmasters.org
Speech contests. speechcontests@toastmasters.org
Orders/returns supplyorders@toastmasters.org
Duplicate club charter. supplyorders@toastmasters.org

Finance Department

Jane McPherson, Controller/Manager

Account balances/credits/statements. statements@toastmasters.org
District finances districtfinancialquestions@toastmasters.org
District reserve/requisitions
Certificates of insurance. financequestions@toastmasters.org
Nonprofit status request (IRS form SS-4)
Returned checks
Wire transfers
Ralph C. Smedley Memorial Fund. RalphCSmedleyMemorialFund@toastmasters.org

Volunteer Support Services

Stephanie Demiris, Manager. districts@toastmasters.org

Area visits
Club officer training
Distinguished district, division, area programs/reports
District and club support
District bylaws and policies
District elections
District membership report questions
District officer lists/changes/questions
District officer training
District reporting requirement
Regional conferences

COMMUNICATIONS AND MARKETING DIVISION

Daniel Rex, Deputy Executive Director and Division Director

Marketing and Merchandising Department

Beverly Wallace, Corporate Relations Coordinator bwallace@toastmasters.org
Corporate relations
New club promotion
Sheryl Delk, Merchandising Coordinator. sdelk@toastmasters.org
Merchandising advertising and promotion
Wendie DeOcampo, Marketing Specialist wdeocampo@toastmasters.org
Membership-building programs

Education Programming

Joe McCleskey, Manager edprog@toastmasters.org
Club program materials
Educational manuals

Publications and Public Relations

Suzanne Frey, Manager

Article submissions submissions@toastmasters.org
Missing your *Toastmasters* magazine membership@toastmasters.org
Public relations pr@toastmasters.org
Letters to the editor letters@toastmasters.org
Magazine advertising maaustin@earthlink.net

Information Services

Ron Leutbecher

PRODUCTION DIVISION

Larry Langton, Director

Building maintenance
Pick, pack and ship operation
Printing and bindery
Receiving
Warehouse operations and inventory

Are you still not sure whom to contact with your question? Visit members.toastmasters.org and click on *Contact Us* or send an e-mail to tminfo@toastmasters.org.

Phone: 949-858-8255

8 a.m. to 5 p.m. Pacific Time, Monday-Friday, excluding holidays

Automated system: 949-835-1300

Fax: 949-858-1207

Web: members.toastmasters.org

Mailing Address

Toastmasters International
PO Box 9052, Mission Viejo, CA 92690-9052 USA

Shipping/Courier Address

Toastmasters International
23182 Arroyo Vista, Rancho Santa Margarita, CA 92688-2620 USA

Visiting Toastmasters World Headquarters

Tours available 9 a.m. to 4 p.m. Pacific Time, Monday-Friday

Appendix





Toastmasters International
 P.O. Box 9052 • Mission Viejo, CA 92690 U.S.A.
 P: 949.858.8255 • F: 949.858.1207

Order online at:
www.toastmasters.org/shop

ORDER FORM *Please print or type name and address clearly. Include club and customer number, and zip code on all correspondence.*

Date _____

Club No. _____ Club Name _____ Customer No. _____

Please ship the following to:

Mail invoice to:

NAME _____
 COMPANY NAME / OTHER _____
 NUMBER AND STREET _____
 CITY STATE / COUNTRY ZIP CODE _____

NAME _____
 COMPANY NAME / OTHER _____
 NUMBER AND STREET _____
 CITY STATE / COUNTRY ZIP CODE _____

PHONE NUMBER (where you can be reached between 8:00 a.m. and 5:00 p.m., Pacific Standard Time.) _____

E-MAIL ADDRESS _____

SHIPPING INFORMATION:

United States Clubs: Standard 1 Day Courier (business day) 2 Day Courier (business days) **Non-United States Clubs:** Airmail (7-21 days) Courier (2-4 days)

PROCESSING INFORMATION:

Standard (up to 5 business days*)
 *Orders received during peak order periods (Aug, Sept, Oct) and those requiring engraving may require more than 5 days.

Express* (\$15.00 + shipping charges)
 *Orders received by 12:00 PST will be processed and shipped the same day. Orders received after 12:00 PST will be processed and shipped within 8 working hours (not available for orders containing items to be engraved).

Item No.	Description	Weight	Quantity	Unit Price	Total Price
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

U.S. SHIPPING CHARGES

WEIGHT	STANDARD	1 DAY COURIER	2 DAY COURIER
.00 - .81	\$3.50	\$20.50	\$10.25
.82 - 2.00	\$5.00	\$26.80	\$11.65
2.01 - 3.00	\$5.75	\$29.15	\$12.85
3.01 - 4.00	\$6.10	\$31.55	\$14.20
4.01 - 5.00	\$6.50	\$33.85	\$15.60
5.01 - 6.00	\$6.60	\$36.15	\$17.05
6.01 - 7.00	\$6.75	\$38.35	\$18.55
7.01 - 8.00	\$7.00	\$40.55	\$20.10
8.01 - 9.00	\$7.25	\$42.70	\$21.75
9.01 - 10.00	\$7.50	\$44.85	\$23.30
10.01 and up	\$7.75 + .75 Each additional lb. (or portion thereof)	\$47.00 + \$2.00 each additional lb. (or portion thereof)	\$24.75 + \$1.50 each additional lb. (or portion thereof)

For the non-U.S. shipping rate table, please see reverse.

Item 1205A

Sub-Total (without engraving charges) _____
 CA residents: Add 7.75% sales tax _____
 U.S. residents: Add shipping (see chart at left) _____
 Non-U.S. residents: Add shipping (see charts on back) _____
 Express Handling: \$15.00 _____
 Engraving Charges: 20¢ per character _____

TOTAL AMOUNT: \$ _____

If your calculations are incorrect, you will be charged the correct amount. To ensure proper charges and credits, we suggest that you pay by VISA, MasterCard, AMEX, or Discover. All information must be complete and payment in U.S. dollars must be included or the order will be returned to you. All telephone, e-mail or Web orders must be paid by credit card. Prices, availability, appearance of all items and postage charges are subject to change without notice.

PAYMENT MUST ACCOMPANY ORDER

Payment Method (U.S. FUNDS): MasterCard VISA AMEX Discover

Check \$ _____ Card Number _____

Cash \$ _____ Expiration Date _____

Signature _____

Purchase Order # (include copy) _____ Gift Certificate # _____

NON-U.S. SHIPPING PRICES

NON-U.S. CLUBS:

Air Mail – Courier

Total Weight _____

You may choose one of these methods for orders sent to addresses outside of the United States. The shipping charges will be based on the weight of the items ordered. Start by calculating the total weight of the items you have requested. Under the U.S. system, one pound (lb) is equal to sixteen ounces (oz). Then, refer to the charts below to determine the amount of postage you need to pay. If your calculations are incorrect, you will be charged the correct amount. To ensure proper charges and credits, we suggest that you pay by VISA, MasterCard, AMEX, or Discover. Please, always include your telephone number and e-mail address. Courier services cannot deliver to a post office box.

Air Mail

Depending upon the destination country and the type and value of the products requested Toastmasters International may choose to upgrade shipment to Courier. This may incur an additional charge, but will ensure delivery.

	Mexico		Canada		Europe	
	AIR MAIL 7-21 DAYS	COURIER 2-4 DAYS	AIR MAIL 7-21 DAYS	COURIER 2-4 DAYS	AIR MAIL 7-21 DAYS	COURIER* 2-4 DAYS
.00 - .99	\$3.60	\$24.25	\$5.30	\$24.25	\$9.75	\$30.50
1.00 - 1.99	\$7.00	\$24.25	\$6.00	\$24.25	\$15.00	\$30.50
2.00 - 2.99	\$12.10	\$24.25	\$8.00	\$24.25	\$20.50	\$33.50
3.00 - 3.99	\$16.25	\$26.50	\$10.00	\$26.50	\$25.50	\$33.50
4.00 - 4.99	\$19.75	\$26.50	\$11.50	\$26.50	\$30.00	\$33.50
5.00 - 5.99	\$21.00	\$26.50	\$13.00	\$26.50	\$34.25	\$36.00
6.00 - 10.99	\$33.00	\$34.50	\$18.50	\$33.50	\$55.50	\$52.00
11.00 - 15.99	\$44.25	\$43.00	\$24.50	\$43.00	\$75.50	\$65.00
16.00 - 20.99	\$55.25	\$47.75	\$30.50	\$47.50	\$95.25	\$73.50
21.00 - 25.99	\$65.00	\$53.00	\$36.00	\$53.00	\$114.50	\$84.00
26.00 - 30.99	\$74.00	\$58.50	\$41.75	\$58.50	\$133.50	\$93.75
31.00 - 35.99	\$82.00	\$65.00	\$47.25	\$65.00	\$152.00	\$102.25
36.00 - 40.99	\$91.00	\$70.25	\$53.00	\$70.50	\$170.50	\$114.50
41.00 - 45.99	\$100.00	\$76.00	\$58.75	\$76.00	\$192.50	\$125.75
46.00 - 50.99	\$108.00	\$81.50	\$64.50	\$81.50	\$214.50	\$136.50
51 lbs. and up/per pound	\$2.25	\$1.65	\$2.25	\$1.65	\$4.50	\$2.75

*These countries only: Germany, United Kingdom, France, Italy, Ireland. For other European countries, use the Courier "All Others" column.

	Asia		S. America	Africa/Middle East	All Others
	AIR MAIL 7-21 DAYS	COURIER** 2-4 DAYS	AIR MAIL 7-21 DAYS	AIR MAIL 7-21 DAYS	COURIER* 2-4 DAYS
.00 - .99	\$11.25	\$34.50	\$5.50	\$8.50	\$65.00
1.00 - 1.99	\$15.00	\$34.50	\$8.00	\$15.00	\$65.00
2.00 - 2.99	\$22.75	\$34.50	\$16.25	\$22.75	\$65.00
3.00 - 3.99	\$28.50	\$45.00	\$20.25	\$28.50	\$65.00
4.00 - 4.99	\$33.75	\$45.00	\$23.50	\$33.75	\$65.00
5.00 - 5.99	\$39.00	\$45.00	\$26.75	\$39.00	\$65.00
6.00 - 10.99	\$64.50	\$66.00	\$42.50	\$64.50	\$107.50
11.00 - 15.99	\$86.00	\$83.00	\$56.75	\$86.00	\$141.00
16.00 - 20.99	\$107.50	\$99.00	\$71.00	\$107.50	\$165.50
21.00 - 25.99	\$128.50	\$115.00	\$83.75	\$128.50	\$193.25
26.00 - 30.99	\$149.00	\$130.00	\$96.00	\$149.00	\$217.25
31.00 - 35.99	\$169.00	\$143.00	\$107.25	\$169.00	\$239.50
36.00 - 40.99	\$189.00	\$150.00	\$118.50	\$189.00	\$262.50
41.00 - 45.99	\$211.00	\$160.00	\$129.50	\$211.00	\$283.50
46.00 - 50.99	\$232.00	\$170.00	\$140.50	\$232.00	\$304.50
51 lbs. and up/per pound	\$5.50	\$3.50	\$3.25	\$5.50	\$5.50

**These countries only: Hong Kong, Taiwan, Singapore, Malaysia, Australia, Philippines, China, Brunei, Indonesia. For other Asian countries, use the Courier "All Others" column.

Sample Dues Statement

Date March 1 2099

Morning Toastmasters Club No. 9999

To: Sally Smith
8888 Main Street
Anytown, MA 22222

Make check payable to: Morning Toastmasters Club

MAIL TO: Walter Clark, Treasurer
PO Box 3333
Anytown, MA 22222

FOR:

Membership Dues:

From April 2099 To September 2099 \$ 27.00

Initiation Fee \$ _____

Meals April and May \$ 18.00

Other Purchases \$ 1.25

FORM NO. 36

TOTAL \$ 46.25

Sample Treasurer's Report

TOASTMASTERS CLUB

TREASURER'S REPORT

FOR THE MONTH OF _____

CASH BALANCE, BEGINNING OF MONTH	\$103.56
CASH RECEIVED:	
DUES	9.50
CASH SPENT:	
MEALS	65.00
POSTAGE	2.60
CASH BALANCE, END OF MONTH	\$ 45.46

Standards for Other Officers



It is important that you understand the roles and responsibilities of your fellow club officers. Following are brief descriptions:

President. The president serves as the club's chief executive officer, responsible for general supervision and operation of the club. Standards outside of the club meeting are to:

- Attend district-sponsored club officer training
- Ensure club officers meet club officer and club meeting standards
- Oversee plan to achieve Distinguished Club Program goals and ensure club is a Distinguished Club
- Encourage communication and leadership development through promoting of CC, AC, CL and AL awards
- Ensure club has an ongoing membership building program
- Attend and vote club's proxy at district council meetings or ensure club member attends and proxies vote to that member
- Attend regional conference and international convention and vote club's proxy or send proxy to district governor
- Oversee administrative operation of club in compliance with the Club Constitution and Bylaws
- Maintain relationship with the district and with Toastmasters International
- Schedule and chair monthly executive committee meeting
- Arrange for a replacement if unable to attend a club or executive committee meeting
- Search for leaders, ensure all club offices are filled for the succeeding term, and ensure timely elections are conducted
- Prepare successor for office.

Standards at the club meeting are to:

- Ensure meeting starts and ends on time
- Make sure guests are warmly and enthusiastically introduced
- Allow time before and after the meeting to speak with guests
- Read and/or display the club mission at every meeting
- Discuss the Distinguished Club Program and the club's progress and achievements in it
- Recognize member achievements in Toastmasters and in their personal lives
- Report on the "Moments of Truth" the club is achieving.

Immediate Past President. The immediate past president provides guidance and serves as a resource to club officers and members. The immediate past president chairs the nominating committee, assists in the preparation of the Club Success Plan and promotes the club's efforts to become a Distinguished Club.

Vice President Education. The vice president education is responsible for planning successful club meetings so that each member has the opportunity to achieve his or her educational goals. He or she is the second-highest ranking club officer, presiding at club and executive committee meetings in the absence of the president. Standards outside of the club meeting are to:

- Attend district-sponsored club officer training
- Plan club meetings, completing schedules and assignments at least three weeks in advance and confirming each schedule five to seven days before the meeting
- Promote participation in the educational program. Get commitment from new members to achieve the CC award within one year or less and schedule them to speak accordingly. Get commitment from CCs to earn ACB awards within one year, and get commitment from ACB and ACS recipients to earn the next award within one year. Get commitment from members to earn the CL award, and get commitment from CLs to earn the ALB award within one year. Track all members' progress toward these awards
- Orient new members to the Toastmasters program within two meetings after they join
- Assign every new member a mentor
- Attend club executive committee meetings and preside when the president is absent
- Attend district council meetings and vote the club's

proxy • Vote at regional and international business meetings • Arrange for a replacement if unable to attend a meeting • Prepare successor for office. Standards at the club meeting are to: • Assign each new member to be a table topics participant at the first meeting after joining, to a meeting role at the third meeting or earlier, and to give the Ice Breaker manual project at the fourth meeting or sooner • Ensure a club member conducts *The Successful Club Series* programs “Evaluate to Motivate,” “Moments of Truth,” “Mentoring,” and “Finding New Members for Your Club” at least once per year • Monitor club performance quarterly in cooperation with the club president • Initial members’ Project Completion Records and ensure eligible members fill out their award applications • Preside over the meeting when the president is absent.

Vice President Membership. The vice president membership is the third-ranking club officer. Standards outside of the club meeting are to: • Conduct ongoing membership building programs. Promote the membership goal of one new member per month and, if the club has fewer than 20 members, achieving 20 members by year-end or sooner • Promote club and Toastmasters International membership building programs and conduct a minimum of two formal club membership programs annually • Follow-up on guests, new members, and members not attending meetings • For all prospective members, explain the educational program, get their commitment to join, collect membership applications, bring the applications to the club for voting and, if the members are accepted, collect dues and fees and give them to the treasurer with the applications • Attend club executive committee meetings • Attend and vote at area council meetings • Arrange for a replacement if unable to attend club meeting • Prepare successor for office. Standards at a club meeting are to: • Greet guests and have each complete a guest card • Report on current membership, promote membership campaigns, and welcome new members • Work with the president and vice president education to ensure each new member is formally inducted at the first meeting after being voted in by the club • Help guests wishing to join complete the Application for Membership • Speak with fellow members to determine if their needs are being met.

Vice President Public Relations. The vice president public relations is the fourth-ranking club officer. Standards outside of the club meeting are to: • Attend district-sponsored club officer training • Promote the club to local media • Produce and distribute a club newsletter at least monthly; promote membership programs • Attend club executive committee meetings • Attend other Toastmasters events • Arrange for a replacement if unable to attend a club meeting • Prepare successor for office. Standards at the club meeting are to: • Announce upcoming events and programs • Ask for contributions to the newsletter • Greet members and guests.

Secretary. The secretary is the fifth-ranking club officer. Standards outside of the club meeting are to: • Attend district-sponsored club officer training • Maintain accurate membership roster and give it to treasurer to submit with dues • Submit the club officer list by visiting members.toastmasters.org or mail it to World Headquarters within 10 days after election • Handle general club correspondence • Keep club files, including the club charter, Constitution and Bylaws, minutes, resolutions, and correspondence • Attend club executive committee meetings • Arrange for a replacement if unable to attend meetings • Prepare successor for office. Standards at a club meeting are to: • Record and read meeting minutes • Greet members and guests.

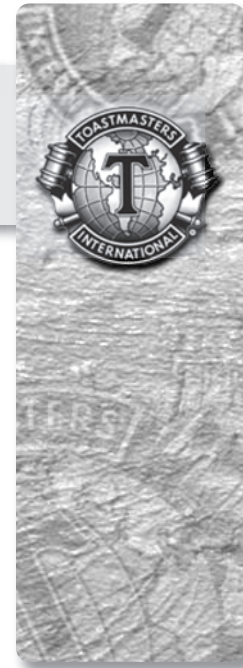
Treasurer. See your standards elsewhere in this manual.

Sergeant at Arms. The sergeant at arms is the seventh-ranking club officer. Standards outside of the club meeting are to: • Attend district-sponsored club officer training • Schedule meeting location • Maintain club equipment in working order and check after every meeting to ensure adequate supplies are available • Attend club executive committee meetings • Arrange for a replacement and for assistance if necessary • Prepare successor for office. Standards at a club meeting are to: • Arrange the room at least 10 minutes before the meeting begins. Make sure the lectern is in place, the banner displayed, evaluation forms and ballots distributed, awards, supply catalog, progress chart and educational material displayed, place cards arranged, and name badges available

- Greet members and guests and arrange for guests to sit with members
- Greet the area governor and other visiting officers and escort them to the club president

Arrange for food service at meal meetings • Ensure the meeting starts on time • Collect ballots and tally votes for awards.

The Toastmasters Organization



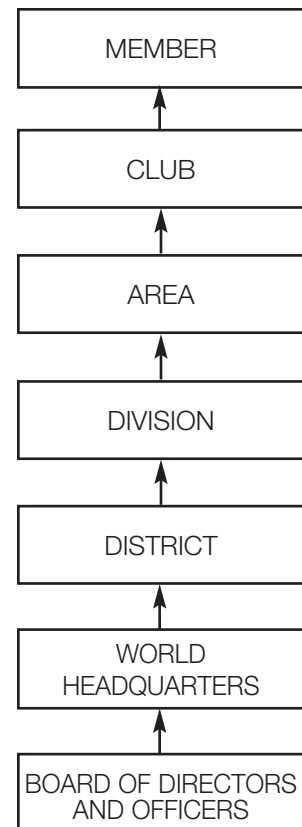
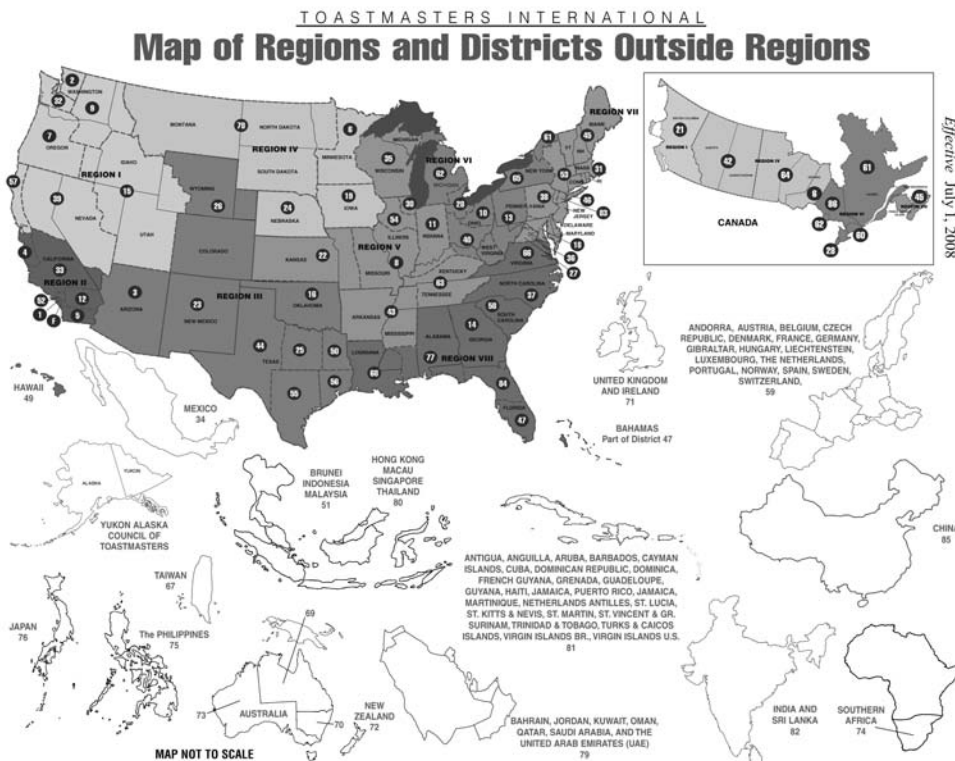
Toastmasters International has more than 10,500 clubs in the United States, Canada and 90 other countries. There are community-based clubs, company employee clubs, military base clubs, bilingual clubs and many others.

In most parts of the world, clubs are grouped into administrative units known as districts to provide greater leadership opportunities and stronger lines of communication. Districts are in turn subdivided into areas, which usually comprise four to seven local clubs. In larger districts, several of these areas may be assigned to a unit known as a division.

District governors are elected each year to serve their districts. An area governor is either elected or appointed to serve your area. He or she should visit your club at least twice during the year.

Setting the policies of the organization is the responsibility of the elected board of directors. In Rancho Santa

Margarita, California, U.S.A., not far from the birthplace of Toastmasters, the World Headquarters staff, headed by the executive director, oversees the day-to-day operation of the organization, providing materials and assistance to clubs and districts. Members and other visitors are always welcome at World Headquarters.



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TOASTMASTERS
INTERNATIONAL