

# Toastmasters Leadership Institute

Janice Strachan, DTM  
[janice.strachan@aphis.usda.gov](mailto:janice.strachan@aphis.usda.gov); 301-851-3878

## Club Treasurer Training

Three Toastmasters Training Modules are relevant to your role as a club officer, specifically as the Club Treasurer. You may download the full text of these modules from

[www.toastmasters.org](http://www.toastmasters.org) => Leadership Central => District Leader Tools => Training => Club officer training materials

1. Club Officer Training: Treasurer - Explains the typical duties that a Club Treasurer performs.
2. Creating a Quality Club - Explains Toastmasters branding, the Moments of Truth module, and the Distinguished Club Program
3. Leading the Club to Success - Teaches club officers motivation, delegation, coaching and SMART goal setting, as well as guiding them through the creation of the Club Success Plan.

TREASURER STANDARDS (from <https://sites.google.com/site/club999941/Resources>)

### Outside 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 ***BEFORE*** October 1 and April 1, and work with the vice president membership to contact members who have not paid dues. Pay dues online:  
Login  
Go to the **Leadership Central Site**  
Click on **Club Central** link  
Choose the club you would like to work with  
Click on **Pay Dues**
5. Submit new member applications and dues to World Headquarters within 48 hours of receipt. (In most cases, this can be done online.)
6. Pay bills as due.
7. Keep records of all financial transactions and correspondence. Reconcile deposits, expenditures, and cash on hand.
8. ~~File IRS form 990-N before May 15 each year. Toastmasters International will do this.~~
9. Present verbal and written financial reports quarterly (October 15, January 15, April 15 and July 15).
10. Submit club accounts for audit.
11. Attend club executive committee meetings. Work with executive committee on Club Success Plan.
12. Attend district-sponsored club officer training in the summer and winter.
13. Read "Club Leadership Handbook", available from <https://www.toastmasters.org/Resources/Resource-Library?t=clh>. (An earlier handbook "When You Are The Treasurer" is available online at <http://www.tmdistrict38.org/PDF/WhenTreasurer.pdf>).
14. Meet with the previous Treasurer to receive any files, records, or documents.
15. Arrange for a replacement if unable to attend a meeting.
16. 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. Collect dues.
3. Report on club finances quarterly.
4. Greet members and guests.

**Big news: new Member Application form related to Pathways. Every new member in our district is automatically in Pathways. They will not get manuals in the mail.**

**Don't forget to ask for the correct fees when you collect dues.**

Treasurer's Report  
For the Period July 1, 2016 to May 14, 2017

Cash Balance, Beginning of Year	\$633.52
<b>Income:</b>	
Dues - New members = \$8.00 (1 person) - Fall Dues = \$1200 (25 people) - Spring Dues= \$912 (19 people)	\$2120.00
Interest earned	\$6.13
Special Occasion Meals - Year End/Officers Installation = \$315 - Holiday = \$330 - Speechcraft Graduation = \$225	\$870.00
Speechcraft = \$900 (12 people)	\$900.00
<b>Expenses:</b>	
Contests - Fall Area = \$10 - Spring Area = _____	(\$10.00)
Dues - New members = \$225 (5 people) - Fall Semi = \$1125 (25 people) - Spring Semi= \$855 (19 people)	(\$2205.00)
Special Occasion Meals - Year-end/Officer's Installation = \$255 (17 people) - Holiday Party = \$329.30 (11 people) - Speechcraft Graduation = \$152.25 + _____	(\$736.55)
Speechcraft Supplies = \$123.85	(\$123.85)
Supplies - membership pins, ribbons = \$91.50 - year-end awards = \$67.30 - conference tape \$19.00 - modules = \$22.20 - deposit stamp = \$15.99 - stopwatch = \$14.99 - wall clock = \$6.99	(\$237.97)
Other - refund of overpayment for officers banquet	(\$90.00)
<b>Account Balance, End of Period</b>	\$1126.28

Outstanding obligations: spring area contest, Speechcraft graduation drinks and cake, additional new members from Speechcraft class, other?

# Dues Sample Letter form generated by FreeToastHost

(also see page 20 of "When You Are the Treasurer")

From: janice.strachan@ams.usda.gov  
Sent: Monday, August 09, 2016 5:32 PM  
To: Strachan, Janice  
Subject: Dues Renewal Invoice for Agricultural Research Center Toastmasters Club

Hello Janice Strachan,

It is time to renew your membership to Agricultural Research Center Toastmasters Club.

In order for our club to achieve the goal of submitting dues on time, we ask all members to make sure payments are received on or before September 29, 2016.

You can hand deliver your check to Janice Strachan or any officer at our club meetings -- the last meeting to hand in the check would be September 21, 2016. Or you can mail in your check to the address below. Your check MUST be received by September 29, 2016 so please allow enough time for postal delivery.

You can use this e-mail as your "invoice". Please submit a copy of this e-mail with your payment. If you do not plan on renewing your membership, or if you know that your payment will be late, please contact me at [Janice.Strachan@aphis.usda.gov](mailto:Janice.Strachan@aphis.usda.gov) or 301-851-3878.

Thank you in advance for your timely payment!

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## I N V O I C E

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BILL TO: Janice Strachan

REMIT PAYMENT TO:

Mrs. Janice Strachan  
1700 Pumphrey Lane  
Silver Spring, MD 20905

\*\* Make all checks payable to A.R.C. Toastmasters #3039

QTY	DESCRIPTION	PRICE
1	semi-annual dues renewal for Agricultural Research Center Toastmasters Club (6 month membership)	\$48
Total Due ON or BEFORE September 29, 2016		\$48

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Dues include \$45 Toastmasters International dues plus \$3 club dues. These dues are for the period October 1, 2016 to March 31, 2017.

You may also pay \$96 for 12 months membership.

**Sample Dues Receipt** for a new member

Date: November-01-2016

Membership / Fees Payment Receipt: Paid by Cash

Dear Joseph Member,

Thank You! We have processed the following transaction:

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Order Detail          Join Date : November 1, 2016

ITEM  MEMBER NO      MEMBER NAME AND ADDRESS      ORDER NO      SUB TOTAL
1      01234567      Joseph Member - TI dues for 5 months      2016144976      $37.50
2      01234567      Joseph Member - new member packet      1001032717      $20.00
3      01234567      Joseph Member - club dues      0000000001      $ 2.50

ORDER TOTAL:                                $60.00

TOTAL PAID:                                $60.00
=====
```

If you have any questions, please send email to [Janice.Strachan@aphis.usda.gov](mailto:Janice.Strachan@aphis.usda.gov)

## Resources to have on hand

Manual: *Club Leadership Handbook* (or download pdf from [www.toastmasters.org/Leadership-Central/Club-Officer-Tools](http://www.toastmasters.org/Leadership-Central/Club-Officer-Tools))

Older version: *When You Are the Treasurer* can be downloaded from

<http://www.tmdistrict38.org/PDF/WhenTreasurer.pdf>

Treasurer Calendar or Checklist : found on pages 15-17 of “When You Are The

Treasurer” Web resources list : found on pages 19 of “When You Are The Treasurer”

List of useful materials to order from Toastmasters Shop : found on page 19 of the manual

The shop used to sell receipt books.

You may find some of these items at the District 36 Bookstore.

Toastmasters Website has Club Officer Resources at <https://www.toastmasters.org/Leadership-Central>

Look here for Management Tools and other helpful resources

List of club members : can be downloaded from the TI club central website

Checkbook and debit card for the club bank account

Access to Toastmasters Club Central : you need to know your personal ID (usually your member number found on the mailing label of the Toastmasters magazine) and password.

A method for tracking who has paid dues, who has decided to drop out of the club, who has paid for 12 months rather than the normal 6 months, etc.

A spreadsheet to help calculate new member fees.

NOTE: In case you need a refresher about your officer role, Core Officer Training modules and slides can be found at

<https://www.toastmasters.org/Leadership-Central/District-Leader-Tools/Training/Club-Officer-Training-Materials>

## Agricultural Research Center New Member Fees starting October 1, 2016

1	2	3	4	5	6	7	8
Month that you are joining	First-time Member Fee*	Monthly Pro-rated TI Organization Dues	Month Pro-rated Club Dues	Additional Semi-Annual Payment Recommended during these months**	Total <b>First-time</b> New Member Fee	Total Fee for Returning, Dual, or Transferring Members (already have a user account at TI)	When does your membership end? ***
January	\$20.00	\$22.50	\$1.50	=	<b>\$44.00</b>	<b>\$24.00</b>	March 31
February	\$20.00	\$15.00	\$1.00	\$48.00	= <b>\$84.00</b>	<b>\$64.00</b>	September 30
March	\$20.00	\$7.50	\$0.50	\$48.00	= <b>\$76.00</b>	<b>\$56.00</b>	September 30
April	\$20.00	\$45.00	\$3.00	=	<b>\$68.00</b>	<b>\$48.00</b>	September 30
May	\$20.00	\$37.50	\$2.50	=	<b>\$60.00</b>	<b>\$40.00</b>	September 30
June	\$20.00	\$30.00	\$2.00	=	<b>\$52.00</b>	<b>\$32.00</b>	September 30
July	\$20.00	\$22.50	\$1.50	=	<b>\$44.00</b>	<b>\$24.00</b>	September 30
August	\$20.00	\$15.00	\$1.00	\$48.00	= <b>\$84.00</b>	<b>\$64.00</b>	March 31
September	\$20.00	\$7.50	\$0.50	\$48.00	= <b>\$76.00</b>	<b>\$56.00</b>	March 31
October	\$20.00	\$45.00	\$3.00	=	<b>\$68.00</b>	<b>\$48.00</b>	March 31
November	\$20.00	\$37.50	\$2.50	=	<b>\$60.00</b>	<b>\$40.00</b>	March 31
December	\$20.00	\$30.00	\$2.00	=	<b>\$52.00</b>	<b>\$32.00</b>	March 31

\* Column 2: The first-time member fee is paid once per life time. It covers the costs of creating your user account and your first two manuals: Competent Communicator and Competent Leader.

\*\* Column 5: The semi-annual dues are collected in August-September and February-March. If you join the club in these months, we ask that you also pay for the semi-annual dues for the next six month period. This is intended to give you a longer membership experience without asking you to make two payments in a short time.

\*\*\* Column 8: The ending date of your membership is based on the expectation that you will pay the fee in column 5.

**For existing members: Semi-annual renewal dues are \$48.00 and are due prior to April 1 and prior to October 1.**

Dues must be paid by cash or check payable to ARC Toastmasters Club. Questions? Contact the club Treasurer.

## Distinguished Club Program (=DCP)

### 10 Goals

1. educational goals. => see new graphic
2. educational goals. => see new graphic
3. educational goals. => see new graphic
4. educational goals. => see new graphic
5. educational goals. => see new graphic
6. educational goals. => see new graphic
7. Four new members
8. Four more new members
9. Minimum four officers trained each training period
10. One semi and one officer list submitted on time

### Membership Requirement

At year-end a Club must have

- at least 20 members, OR
- net growth of at least five new members

### Recognition

Clubs that meet the membership requirement and do the following earn recognition:

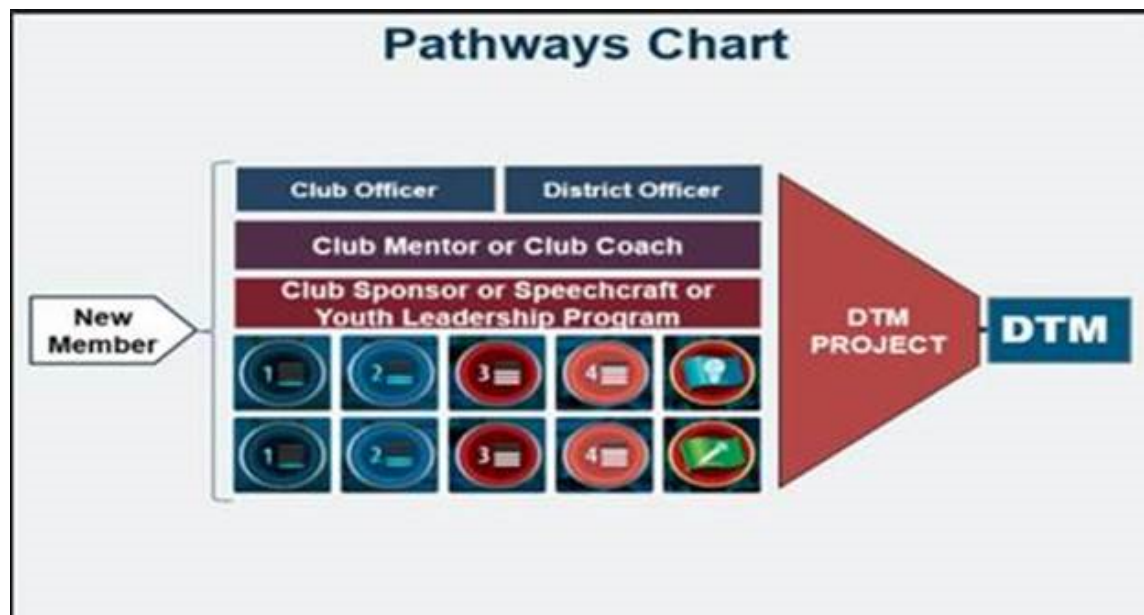
Achieve 5 of 10 goals Distinguished Club

Achieve 7 of 10 goals Select Distinguished Club

Achieve 9 of 10 goals President's Distinguished Club

TOASTMASTERS INTERNATIONAL			
<b>Current DCP</b> <b>PROGRAM EDUCATION GOALS</b> <ol style="list-style-type: none"> <li>Two CC's</li> <li>Two more CC's</li> <li>One ACB, ACS or ACG</li> <li>One more ACB, ACS, or ACG</li> <li>One CL, ALB, ALS or DTM</li> <li>One more CL, ALB, ALS or DTM</li> </ol>	<b>DCP in Pathways</b> <b>PATHWAY EDUCATION GOALS</b> <ol style="list-style-type: none"> <li>Four Level 1's</li> <li>Two Level 2's</li> <li>Two more Level 2's</li> <li>Two Level 3's</li> <li>One Level 4</li> <li>One Level 5</li> </ol>		
<b>Transition DCP</b> <b>EDUCATION (SELECT 6 OF 12 GOALS)</b> <table> <tr> <td> <ul style="list-style-type: none"> <li>Two CC's</li> <li>Two more CC's</li> <li>One ACB, ACS or ACG</li> <li>One more ACB, ACS or ACG</li> <li>One CL, ALB, ALS or DTM</li> <li>One more CL, ALB, ALS or DTM</li> </ul> </td><td> <ul style="list-style-type: none"> <li>Four Level 1's</li> <li>Two Level 2's</li> <li>Two more Level 2's</li> <li>Two Level 3's</li> <li>One Level 4</li> <li>One Level 5</li> </ul> </td></tr> </table>		<ul style="list-style-type: none"> <li>Two CC's</li> <li>Two more CC's</li> <li>One ACB, ACS or ACG</li> <li>One more ACB, ACS or ACG</li> <li>One CL, ALB, ALS or DTM</li> <li>One more CL, ALB, ALS or DTM</li> </ul>	<ul style="list-style-type: none"> <li>Four Level 1's</li> <li>Two Level 2's</li> <li>Two more Level 2's</li> <li>Two Level 3's</li> <li>One Level 4</li> <li>One Level 5</li> </ul>
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## How to get a DTM in Pathways



## General Overview of Toastmasters Year

July	<p style="text-align: center;">Club Officer training</p> <p>Treasurer: Prepare Budget</p>	January
August	<p style="text-align: center;">Club Officer training</p> <p style="text-align: center;">Club Contests (Fall = Humorous Speech <b>and</b> Table Topics; Spring = International Speech and Evaluation)</p> <p>International Convention and Contests</p>	February
September	<p style="text-align: center;">Area Contests</p> <p style="text-align: center;">Pay your Semi-Annual Dues to the Club</p> <p style="text-align: center;">Treasurer : Pays club Semi-Annual Dues to TI</p>	March
October	<p style="text-align: center;">Division Contests</p> <p style="text-align: center;"><del>Treasurer : File the 990-N form</del>    TI will files for all clubs</p>	April
November	<p style="text-align: center;">District Conference and Contests (District 36 is on third Saturday)</p> <p style="text-align: right;">Elections</p> <p style="text-align: center;">Secretary: Submit the Officer List to TI</p>	May
December	<p style="text-align: center;">Club Officer training</p> <p>Holiday celebrations</p> <p style="text-align: center;">End-of-Year Awards Ceremonies</p>	June