

# **D112 2021 – 2022 Final Budget Proposal**

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## **PART 1 INTRODUCTION**

**Basis:** *The foundation for the budget is District Procedure 1*

*The District Mission as defined by Toastmasters International is: “We build new clubs and support all clubs in achieving excellence”.*

*To improve the promotion of Toastmasters International within New Zealand, each year District 112 shall aim to achieve, using the District Success Plan, the minimum of Distinguished District and this year it is aiming to be Select Distinguished District.*

*District 112 covers a large geographical area and is committed, as much as practicable, to providing “the benefits of Toastmasters to rural and urban areas and to ensuring that urban and rural members are enabled to take advantage of the communication and leadership opportunities in the District”.*

### **Final Budget**

Attached is our final budget for the 2021-2022 year. We have been directed by the [Protocol 8.4 – Section 4C](#), whereby a District cannot budget to recognise a loss for the year.

This year, like last year, we had been instructed to deliver a budget that was at breakeven at the best whilst being financially prudent at the same time.

At the June Toastmasters International Executive Committee meeting the following advise was sent to all Districts:

Provide financial flexibility to Districts by allowing them to budget a financial loss for the 2021-2022 program year of no more than 20% of the budgeted revenue for the program year, and provided that the funds are used according to the five priority categories of Protocol 8.4, Section 1 and provided that the year end District required retention amount is met.

The categories are as outlined.



District funds are to be used to support the District mission. District officers are required to use funds effectively according to the District Success Plan, as well as Toastmasters Policy and Protocol. Expenses shall be incurred according to the following priorities:

- I. Education and Training
- II. Marketing outside Toastmasters
- III. Club growth and club retention
- IV. Membership growth and membership retention
- V. District communication and public relations

## **PART 2 THE NARRATIVES**

The following are questions from Toastmasters International and the District's Answers

### **MEMBERSHIP REVENUE \$83,330**

**Q** *What is the District's goals for the year regarding membership? Since these numbers are based off prior year's actual totals, what strategies have changed or remained the same compared to last year to ensure this budgeted revenue is met?*

**A** Membership payment has been challenging over the last two Toastmasters periods with a substantial fall in membership which has resulted in a smaller pot of funding to operate the District. Please note the changes.

2021-2022 Payments 5578, decrease of 670 payments or -10.7%

2020-2021-Payments 6248, decrease 267 payments or -4.1%

2019-2020 Payments 6515, increase of 7 payments, or +0.01%

2018-2019 Payments 6508

The reduction of payments is spread over both corporate and community clubs. Many dual members have also rationalised the clubs they belong to, as District 112 has a high proportion of members that fall into this category.

The advent of both hybrid and online meetings is now becoming more the norm and has significant advantages to the organisation when marketing club activities and can be balanced by the ever increasing numbers who comment about "Zoom Fatigue", which is a very real challenge.

To enable clubs to operate in the online environment we had decided to purchase Zoom licences for all Divisions to share with the clubs and Areas. This appears to be taken well with clubs.

We believe that we have hit the bottom of the membership fall and the only direction we can go is upwards. Of late the number of inquiries to clubs has been good as the general public seek to improve their communication skills to enable them to advance themselves in the workforce.



Our District strategy will drive membership with campaigns to gain recognition, awareness and new members:

Our prediction is attaining membership of 5746 or an additional 168 member payments as this will represent a 3% growth and basically an additional member per club in the District. The Division Directors have all been tasked with gaining one additional club per Division and there is a strong belief that this can be achieved.

Ensuring that we are in the public eye always will be through the ever improving website that is being developed for the District and the hard work in getting the district recognised through all other social media platforms by our Public Relations Manager.

### **CONFERENCE / NET INCOME \$289**

**Q** *What city will they be held in? If conferences are not budgeted to net zero, explain why. What is the profit for? How do you justify the loss? How many attendees are you budgeting for and at what cost each? About how much will the tickets cost per registrant? How much are the venues budgeted to cost? Did the prior term pay any expenses or receive any revenue for these conferences?*

**A** This is an area that we are all hoping will not be affected by any further lockdowns as the last two conferences in Napier and Auckland have had to be held online.

The District has scheduled the 2022 conference to be held in Taupo, which is ironically central to most Divisions in the District. The team is well placed with their plans and at the time of collating the details for the Budget had changed venues for several reasons. The budget figures are based on the Suncourt Events Centre; however, this has not been completely finalised. There is another option for the Great Lakes Centre, still in Taupo that is being considered seriously. I have been in touch with Finances at Toastmasters International raising this issue with them and they are happy for us to stay with the figures we have entered and can raise narratives to this topic each quarter when we report back to Toastmasters International.

The conference dates are 6-8 May 2022, put it in your diaries and we will have all the expected activities that we have missed over the last couple of years at the conference.

### **FUNDRAISING \$0**

**Q** *How many events will be held? What is each event for? What will the funds received be used for?*

**A** There will be no scheduled fundraising activities for the District this year and we will do our very best with the funding we have from Toastmasters International.

### **DISTRICT STORE \$0**

**Q** *Does the District have a District Store? If not, why? Are all the costs from Toastmasters products? If not from WHQ what are the other costs? When is the district store available to members? Are all the costs from Toastmasters International products? If not from World Headquarters, what are the other costs? When is the District Store available to the members?*



- A The District does not operate a District Supplies either on its own or in conjunction with District 72. As most items previously attained were workbook material this is all available in down loadable format.

Any items over and above that individual clubs wish to purchase can be added to the District order when that is made to get the best bang for our buck, collectively.

## **OTHER REVENUE**

- Q *What other revenue is expected? Who is it from?*

- A No other revenue is expected.

## **MARKETING OUTSIDE OF TOASTMASTERS \$8,400**

- Q *What is the main focus for your district? What events are planned? What is different from last year?*

- A There will be intensive pushes in the District to keep existing members interested in toastmasters, entice past members to return, as the Toastmasters scene has changed considerably for the better and this will be marketed.

Along with attracting visitors to clubs the emphasis will be on converting them from prospect to future and current members. At the moment the District is seeing a revival of interest in Toastmasters and the most has to be made of this situation.

A goal for each of the Divisions will be to create a new club within their boundaries, which can include virtual members. This is an exciting approach as clubs are more in tune with both online and hybrid environments.

The marketing will coincide with the planned Toastmasters International program and will be supported with an array of printed collateral and brochures.

This year we are taking a more collaborative approach to the marketing by involving all the Divisions. Ownership of marketing will ensure the results are achieved.

Ongoing website work will eventually result in a platform that will be better for members and visitors, creating the interest and excitement that all good sites need to have.

## **PUBLIC RELATIONS \$9,127**

- Q *What is the main focus for your district? What events are planned? What is being done differently or the same as last year?*

- A The District is very fortunate to have one of the sharpest PRM in any district with Elizabeth Viljoen. Along with the Club Growth director every public relations tool, device and resource will be applied. At the start of the year all the Divisions were to identify a Division PRM to work alongside the District PRM and we are on track in achieving this feat.

Emphasis will be placed on effective social media as we target a younger generation of members.

Funding has been channelled into Facebook and some traditional printed media.

Public Relations also spills into the District website, again work in progress.



## **CLUB GROWTH \$14,036**

**Q** *What is the main focus for your District? What events are planned? What is being done differently or the same as last year?*

**A** The District Mission will be the driving force and focus for us this year. With the prospects of upwards turn in confidence there will be more need to create and fill opportunities in communities and corporate needs.

During the planning stages of the year each division was tasked with identifying the new club potential and work has started on bringing these to fruition. This will happen for all Divisions throughout the year.

The carrot approach is being applied where we will be incentivise activities as all good Toastmasters love a challenge with a reward.

This expense category merges with activities from other sections of the budget and will be required for all plans to come through by the year end. Focus will also be on retention and internal growth at existing club level as we have many clubs who would benefit from a larger club membership base.

Clubs reaching particular milestone anniversaries will be encouraged to celebrate these and market to the greater market as a club will experience and longevity is a great combination to be considered by someone wishing to take the step and join a toastmaster's club in D112.

## **RECOGNITION \$12,194**

**Q** *What is the main focus for your District? What events are planned? What is being done differently or the same as last year?*

**A** Recognising achievement be it educational, or District incentives, is an important part of Toastmasters. We will be awarding pins at the earliest time that we can for the award recognition to be of value to the recipient and for fellow members to appreciate. Often an award achieved early in the year only gets to be recognised at Division Conferences, District Conferences or further afield by the September District Awards function. The lateness can be disheartening to a member who may then have thoughts that District, and toastmasters don't care. Our goal this year is to recognise as early as possible and celebrate formally at the District Awards where it should be done in front of your peers.

The prediction this year is audacious and achievable as we have only the one education program now and there has been time and training in the process of applying the awards achieved through Club Central, as has been evidenced by the early awards numbers for the year.

The major difference between last year and this year will be the timing for the awards being recognised.

## **EDUCATION AND TRAINING \$12,447**

**Q** *What is the main focus for your district? What events are planned? What is being done differently or the same as last year?*

**A** The main focus for the district is to grow confidence with pathways.





Pathway educational material, templates, workshops and support available on website. Incentives - pathway pin for completed paths, Presidents Distinguished club trophies. Continue with strategy meetings with district officers each year after election. COT hybrid 2 sessions - additional AV equipment. Triple Crown Awareness campaign.

We are an organisation that thrives on educating its District Officers and Club Executive Officers. We had planning sessions with the incoming District team that followed sessions with the incoming Division team, who have contributed to the future path for the District.

Club Officer training has been successfully completed with a remarkable attendance from clubs. Round two will commence from November and is scheduled to be both online and in person at this stage.

We have encouraged the growth of the Base Camp Managers in managing the awards for their members and the process to gain the best value for the members and the clubs.

Recognising awards and achievements in education and training go together.

Workshops are being scheduled to allow our members grow their knowledge base.

### **SPEECH CONTESTS \$4,100**

**Q** *What is the focus for your district? What events are planned? What is being done differently or the same as last year?*

**A** This year each district was to determine the state of contest for all Area, Division & District contests and at the DEC on 23 July it was overwhelmingly stated that District 112 wanted to have in-person contests. At the time the country was basking in a new normal and in-person was the logical choice and the budget was originally scheduled to factor venues and incidentals for contests.

The tide has turned, and Area and Division Directors are primed for in-person contests when available and at the worst case scenario, online as has been the case for the last two years.

The member's directive is what is driving the District team and every endeavour to fulfil the contest format will be made.

The difference between the years is that last year the directive came from WHQ and was not negotiable and this year the District has made the determination.

In anticipation, the District has attained zoom accounts for all divisions to be self-sufficient.

If we have one single Area break ranks and run an online contest, then ALL others have no choice and must do the same including District Contests.

### **ADMINISTRATION \$8,341**

**Q** *What is the main focus for your district?*

**A** The Administration cost centre captures all the expense for running the District efficiently including the delivery of all communications to the membership, Zoom accounts, which have been mentioned throughout and the developing website.

### **FOOD AND MEALS \$6,620**

- Q *What is the main focus for your District? Are there any maximums for your District to keep food and meal costs at a minimum? Who is budgeted to be reimbursed for food and meals? What events are being budgeted to be reimbursed for food and meals? What is being done differently or the same as last year?*
- A There has been an allowance for each of the trio District officers to cater for the Division Conferences that they visit during the year and also for both the Area & Division directors to cater for the Area Conferences and Division Conferences.  
With the Area & Division Conferences, there will be educational workshop built in to the program therefore a need to cater to the audience as best possible.

### **TRAVEL \$12,631**

- Q *What is the main focus for your district? Are there any maximums for your District to keep travel costs at a minimum? Who is budgeted to be reimbursed for travel? What is being done differently or the same as last year? What events are being budgeted to be reimbursed for travel? Are there any maximums for your district to keep travel costs at a minimum? What is being done differently or the same as last year?*
- A Travel is by far the hardest and most challenging expense item to predict.  
We work on the basis that all Area Directors will be reimbursed for the two "official" club visits that they can claim for during the year. We have also allowed for one visit per Area by the Division Directors. There is an absolute need to engage with the membership, therefore removing the notion that District officers never venture out at all.  
Allowance has been made for DOT sessions which this year will be a blend of in-person and online and the former will require some Area & Division Directors flying to Auckland.  
There has been planning sessions offsite for the District Trio and Division Directors that has set the year up well for the District.  
Travel has been calculated for the Taupo Conference next May and every endeavour will be made to have District Officers pool cars where they can.  
DOT in June was well attended in person at The Best Western and has set up the Area Directors for the year.  
DOT scheduled for September has been removed from the budget as it is now online.  
The approach to the budget is that everyone will claim their entitlement and invariably many district officers do not.

### **LODGING \$7,970**

- Q *What is the main focus for your District? Are there any maximums for your District to keep lodging costs at a minimum? What is the main focus for your District? Are there any maximums for your District to keep lodging costs at a minimum? Who is budgeted to be reimbursed for lodging? What events are being budgeted to be reimbursed for lodging? What is being done differently or the same as last year?*



- A Normally we would allow for the District Trio to attend mid-year training and we have removed this now as we had been advised that this year it will be online again. If the District completes the Toastmasters Year as a Distinguished District or above, then, as per District Procedures, accommodation is paid for the Immediate Past District Director to attend the Toastmasters International Convention.

We have made an allowance for any International Director visiting the District for the District Conference along with any keynote speakers. As of now we have had no indication of any International Director heading our way in person. Allowance has been made for Divisions for their Division conferences.

### OTHER EXPENSES

Q *What other expenses are expected?*

A No other expenses are envisaged

## PART 3 2021-2022 DISTRICT BUDGET

### D112 2021-2022 District Budget Proposal

	TI Max Exp %	% Of Tot Exp	BUDGET	Last year Actual	Last year's Budget
Membership Revenue			\$83,330	\$84,317	\$89,821
Conference Revenue			\$31,126	\$1,208	\$0
Fundraising Revenue			\$0	\$0	\$0
TLI Revenue			\$0	\$0	\$0
District Store Revenue			\$0	\$0	\$0
Speech Contest Revenue			\$0	\$0	\$0
Interest Revenue			\$0	\$0	\$0
Education and Training Revenue *			\$0	\$0	\$480
Other Revenue			\$0	\$1,297	\$0
Total Revenue			<u>\$114,456</u>	<u>\$86,822</u>	<u>\$90,301</u>
Conference Expense	N/a		\$30,837	\$0	\$0
Fundraising Expense	N/a		\$0	\$0	\$0
TLI Expense	N/a		\$0	\$0	\$0
District Store Expense	N/a		\$0	\$0	\$0
Marketing Outside Toastmasters Expense	10%	10.1%	\$8,400	\$10,849	\$8,982
Marketing Expense				(\$3,089)	
Recognition Expense	20%	14.6%	\$12,194	\$2,871	\$10,880
Club Growth Expense	15%	16.8%	\$14,036	\$1,946	\$13,320
Public Relations Expense	10%	11%	\$9,127	\$5,047	\$7,922





# **Toastmasters New Zealand North** **District 112**

Communications & PR Expense				(\$53)	
Education & Training Expense	15%	14.9%	\$12,447	\$178	\$13,486
Speech Contest Expense	5%	4.9%	\$4,100	(\$865)	\$1,726
Administration Expense	10%	10%	\$8,341	\$7,121	\$8,965
Travel Expense	25%	15.2%	\$12,631	\$9,328	\$13,471
Lodging	15%	9.6%	\$7,970	\$3,794	\$7,186
Food and Meals	15%	7.9%	\$6,620	\$3,507	\$4,363
Other Expense	0%	0%	\$0	\$4,917	\$0
			<u>\$126,703</u>	<u>\$45,551</u>	<u>\$90,301</u>
District net Surplus/Deficit			<b>-\$12,247</b>	\$41,271	\$0

## **PART 4 2021-2022 DISTRICT BUDGET CATEGORY DETAILS**

### **Membership Revenue**

This is set by WHQ \$83,330

### **Marketing Outside Toastmasters Expenses**

7006	Marketing – Educational Materials	\$0
7008	Marketing-Promotional Materials	\$5,400
7010	Marketing – Awards Expense (Trophies, Plaques, Ribbons)	\$0
7012	Marketing-Supplies & Stationery Expense	\$3,000
7036	Marketing – Advertising Expense	\$0
7044	Postage and Shipping Expense	\$0
7086	Marketing-Miscellaneous Expenses	\$0
	<b>TOTAL MARKETING EXPENSES</b>	<u><b>\$8,400</b></u>

### **Recognition Expenses – Area, Division & District**

7006	Recognition – Educational Materials	\$0
7008	Recognition - Promotional Materials	\$0
7010	Recognition – Awards Expense	\$394
7012	Recognition - Supplies & Stationery	\$0
7036	Recognition-Advertising Expense	\$0
7044	Recognition-Postage & Shipping	\$0
7082	Recognition-Incentives	\$11,800
	<b>TOTAL RECOGNITION EXPENSES</b>	<u><b>\$12,194</b></u>



### **Club Growth Expenses Building New Clubs and Rebuilding New Clubs**

7006	Educational Materials	\$0
7008	Promotional Materials	\$0
7010	Awards Expense	\$0
7012	Supplies & Stationery Exp	\$0
7036	Advertising Expense	\$0
7044	Postage & Shipping	\$0
7082	Incentives	\$2,352
<b>TOTAL CLUB GROWTH EXPENSES BUILDING AND REBUILDING NEW CLUBS EXPENSES</b>		<b>\$2,352</b>

### **Club Growth Expenses Membership Growth and Membership Retention**

7006	Educational Materials	\$0
7008	Promotional Materials	\$3,484
7010	Awards Expense	\$0
7012	Supplies & Stationery Exp	\$0
7036	Advertising Expense	\$0
7044	Postage & Shipping	\$0
7082	Incentives	\$8,200
<b>TOTAL CLUB GROWTH MEMBERSHIP GROWTH AND RETENTION EXPENSES</b>		<b>\$11,684</b>

### **Club Growth Expenses Coaching and Other**

7006	Educational Materials	\$0
7008	Promotional Materials	\$0
7010	Awards Expense	\$0
7012	Supplies & Stationery Exp	\$0
7036	Advertising Expense	\$0
7044	Postage & Shipping	\$0
7082	Incentives	\$0
<b>TOTAL CLUB GROWTH COACHING AND OTHER EXPENSES</b>		<b>\$0</b>

**TOTAL CLUB GROWTH EXPENSES** **\$14,036**

### **Public Relations Expenses**

7008	PR Promotional materials	\$5,913
7012	PR Supplies & Stationary	\$0
7014	PR Room Rental Event Expense	\$0
7020	PR Printing Expense	\$0
7024	PR Newsletter Expense	\$0
7026	PR Website Expense	\$3,133
7028	PR Directory Expense	\$0



7042	PR Outside Contractor Expense	\$0
7044	PR Postage and Shipping Expense	\$0
7086	PR-Miscellaneous Expenses	\$81
<b>TOTAL COMMUNICATIONS &amp; PR EXPENSES</b>		<b><u>\$9,127</u></b>

## **Education & Training Expense**

		Total
TRAINING CLUB OFFICERS		
7006	ET Educational Materials	\$0
7010	ET Awards Expense (Trophies, Plaques, Ribbons & Certificates Expense	\$2,200
7014	ET Room Rental Event Expense (including Zoom)	\$1,600
7042	ET Outside Contractor Expense	\$0
<b>TOTAL EXPENSE TRAINING CLUB OFFICERS</b>		<b><u>\$3,800</u></b>
TRAINING DISTRICT OFFICERS		
7004	ET Badges and Pins	\$0
7006	ET Educational Materials	\$0
7012	ET Supplies and Stationery Expenses	\$2,206
7014	ET Room Rental Event Expense	\$5,731
<b>TOTAL EXPENSE TRAINING DISTRICT OFFICERS</b>		<b><u>\$7,937</u></b>
ET OTHER Expenses		
7004	ET Badges and Pins	\$0
7006	ET Educational Materials	\$0
7010	ET Awards Expense (Trophies, Plaques, Ribbons & Certificates Expense	\$710
7082	ET Incentives	\$0
<b>TOTAL OTHER EXPENSE</b>		<b><u>\$710</u></b>
<b>TOTAL EDUCATION &amp; TRAINING EXPENSE</b>		<b><u>\$12,447</u></b>

## **Speech Contest Expense**

7010	SC Awards Expense	\$380
7012	SC Supplies and Stationery Exp	\$320
7014	SC Room Rental	\$1,400
7078	SC Food Expense	\$0
7090	SC Equipment Rental	\$0
7042	SC Outside Contractor Exp	\$2,000
<b>TOTAL SPEECH CONTEST EXPENSE</b>		<b><u>\$4,100</u></b>



## Administration Expense

7008	Admin-Promotional Materials	\$0
7010	Admin-Awards Expense (Trophies, Plaques)	\$253
7012	Admin-Supplies and Stationery Expense	\$323
7014	Admin-Room Rental Event Expense	\$0
7020	Admin-Printing Expense	\$0
7022	Admin-Audio Visual; Expense	\$0
7026	Admin-Website Expense	\$3,488
7030	Admin-Photocopying Expense	\$0
7032	Admin-Telephone Expense	\$1,450
7034	Admin-Conference Calls & Webinars	\$1,798
7044	Admin-Postage & Shipping expense	\$550
7046	Admin-Express Mail/Courier Expense	\$300
7048	Admin-Equipment Purchase Expense)	\$0
7070	Admin-Bank Charges & Credit Card Fee	\$0
7086	Admin-Miscellaneous Expense	\$179
7084	Admin-Sympathy Expense	\$0
7088	Admin Storage Expenses	\$0
7090	Admin-Equipment Rental	
7092	Admin-TI Allocation	\$4,176
<b>TOTAL ADMINISTRATION EXPENSE</b>		<b>\$8,341</b>

## Travel Expense

7062	District Director Transportation - Mileage Expense	\$450
7062	Program Quality Director - Transportation – Mileage Expense	\$396
7062	Club Growth Director - Transportation – Mileage Expense	\$273
7062	Finance Manager – Transportation - Mileage Expense	\$130
7062	PR Manager – Transportation - Mileage Expense	\$150
7062	Administration Manager – Transportation - Mileage Expense	\$0
7060	Division Director – Transportation – Airfare Expense	\$391
7062	Division Director – Transportation - Mileage Expense	\$2,386
7060	Area Director – Transportation – Airfare Expense	\$1,038
7062	Area Director – Transportation – Airfare Expense	\$6,904
7062	IPDD – Transportation – Mileage Expense	\$200
7062	Transportation – Mileage Expense – Other Member	\$313
<b>TOTAL TRAVEL EXPENSE</b>		<b>\$12,631</b>



### **Lodging Expense**

7058	District Director Lodging Expense	\$450
7058	Program Quality Director - Lodging Expense	\$450
7058	Club Growth Director - Lodging Expense	\$450
7058	Finance Manager – Lodging Expense	\$0
7058	PR Manager – Lodging Expense	\$0
7058	Administration Manager – Lodging Expense	\$0
7058	Division Director – Transportation – Airfare Expense	\$4,920
7058	Area Director – Transportation – Airfare Expense	\$0
7058	IPDD – Transportation – Mileage Expense	\$0
7058	Transportation – Mileage Expense – Other Member	\$1,700
<b>TOTAL LODGING EXPENSE</b>		<b>\$7,970</b>

### **Food and Meals**

7078	District Director Food Expense	\$90
7058	Program Quality Director Food Expense	\$90
7058	Club Growth Director - Food Expense	\$1,090
7058	Finance Manager - Food Expense	\$60
7058	PR Manager - Food Expense	\$60
7058	Administration Manager- Food Expense	\$60
7058	Division Director – Food Expense	\$2,200
7058	Area Director – Food Expense	\$2,850
7058	IPDD – Food Expense	\$60
7058	Other Member – Food Expense	\$60
<b>TOTAL FOOD AND MEAL EXPENSES</b>		<b>\$6,620</b>