



# Region Advisor District Visit Checklist

When a Region Advisor conducts a District Visit, the expectation is that the District takes as much advantage of their presence as possible. The goal of a Region Advisor District Visit is to support leadership development, skill building, mentoring, and coaching to expand District leaders' capacity to achieve the District mission. Make sure every interaction with the Region Advisor furthers the accomplishment of this goal.

Below is a checklist of items that should be completed to support a Region Advisor District Visit. Pages 3-11 include space for you to document the work you do completing this checklist.

## **Schedule a meeting with the Region Advisor and the District team and the beginning and end of the District Visit**

- ▶ During the first meeting, discuss the team's goals and expected outcomes of the District Visit. For example, think about if there are specific skills that the Region Advisor could model for the team that would support them in their responsibilities.
- ▶ During the final meeting, assess whether the team's goals and expected outcomes were achieved.
- ▶ Include the District trio and other District leaders, as applicable.
- ▶ Document the details of the meetings on **page 5**.

## **Create a list of events you would like the Region Advisor to attend.**

- ▶ This list could include meetings, conferences, trainings, and more.
- ▶ Document all events you would like the Region Advisor to attend on **page 5**, including all relevant details.
- ▶ If there will be a business meeting taking place during the visit, invite the Region Advisor and document the details on **page 7**.

## **Create a list of corporate and club-building opportunities the Region Advisor can support you in completing.**

- ▶ This is a great opportunity to observe an expert engaging with a company that is interested in building a Toastmasters club.
- ▶ You should have as many of these opportunities arranged as possible. Then use some of the later opportunities to practice the skills that were modeled and receive feedback from the Region Advisor.
- ▶ Document all corporate and club-building opportunities on **page 7**, including all relevant details.

## **Create a list of all speeches, presentations, and/or trainings that you would like the Region Advisor to conduct.**

- ▶ Consider the best ways you can ensure as many of your team as possible can benefit from your Region Advisor's expertise.
- ▶ Document all speeches, presentations, and/or trainings on **page 9**, including all relevant details.

## **Create a list of all Media Opportunities you have arranged for the Region Advisor.**

- ▶ Work with the Public Relations Manager to arrange radio, television, and/or newspaper interviews for the Region Advisor.
- ▶ Document all media opportunities on **page 10**, including all relevant details.

Once you have completed all the items above, create a travel plan for the Region Advisor.

- ▶ This includes suggested arrival and departure dates and locations, identifying District team members to pick up and drop off the Region Advisor, and hotel accommodations.
- ▶ Document all travel plans on **page 4**.

Create a one-page agenda with the high-level information of where the Region Advisor needs to be and when they need to be there on **page 3**.

Complete the table below with information that describes, in chronological order, where the Region Advisor needs to be, when they need to be there, and what type of event it is. An example is included for your reference:

Date	Time	Location	Description
<i>June 28, 2024</i>	<i>8:00am - 10:00am</i>	<i>Location Name Address</i>	<i>District Team Visit</i>

## Travel

For your visitor to make travel plans, please provide the following information:

Suggested arrival date: \_\_\_\_\_ Arrival airport/station: \_\_\_\_\_

Suggested departure date: \_\_\_\_\_ Departure airport/station: \_\_\_\_\_

*Your visitor will ensure you receive their travel itinerary.*

Once you receive the travel itinerary, please arrange for a District team member to meet the visitor at the arrival airport/station, as applicable. At the end of the visit, please arrange for a District team member to drive your visitor to the departure airport/station, as applicable.

Please provide the following:

Name of individual picking up visitor at the airport/station: \_\_\_\_\_

Mobile Number of the individual: \_\_\_\_\_

Name of individual dropping off visitor at the airport/station: \_\_\_\_\_

Mobile Number of the individual: \_\_\_\_\_

If your visitor decides to drive to your District, your visitor will notify you. Please provide the suggested arrival time for the visitor to prepare travel accordingly.

Approximate Arrival Time: \_\_\_\_\_

## Accommodations, as applicable

The District is responsible for booking the hotel for your visitor. Should the District receive a complimentary room from the hotel where the event is being held, this room should be reserved for your visitor to minimize costs. If that is not the case, the District is responsible for covering the cost of the hotel. If the District is unable to cover the cost of the hotel, please contact Toastmasters International for possible reimbursement (approved on a case by case basis).

Please provide the following details:

Hotel Name: \_\_\_\_\_

Hotel address: \_\_\_\_\_

Hotel email: \_\_\_\_\_

Hotel phone number: \_\_\_\_\_

Confirmation/Reservation number: \_\_\_\_\_

If your visitor is staying in more than one hotel during this visit, please provide the above information for each hotel on the additional information page.

If your visitor is traveling within the District and will require airline reservations to complete this travel, please provide the exact flight details (departure and arrival airport code, date, time, airline, flight number) on the additional information page.

## Meeting with the District team

The District should schedule a pre- and end-of-visit meeting with the District trio and other District leaders, as applicable, to discuss the overall strength of the District in achieving the District mission.

Names and titles of those participating:

If the meeting takes place online or in a hybrid format:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

For each Meeting, Conference, or Training event:

### Event #1

Type: Meeting Conference Training Other \_\_\_\_\_

Mode: Onsite Hybrid Online

If onsite or hybrid, as applicable: \_\_\_\_\_

Event Venue: \_\_\_\_\_

Venue address: \_\_\_\_\_

Venue email: \_\_\_\_\_

Venue phone number: \_\_\_\_\_

Estimated number of attendees: \_\_\_\_\_

If hybrid or online, as applicable: \_\_\_\_\_

Meeting Platform: \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Main Contact for Visit: \_\_\_\_\_

Main Contact Preferred Number: \_\_\_\_\_

Preferred method of contact (phone call, text, WhatsApp, etc.): \_\_\_\_\_

## Event #2

Type: Meeting Conference Training Other \_\_\_\_\_

Mode: Onsite Hybrid Online

If onsite or hybrid, as applicable: \_\_\_\_\_

Event Venue: \_\_\_\_\_

Venue address: \_\_\_\_\_

Venue email: \_\_\_\_\_

Venue phone number: \_\_\_\_\_

Estimated number of attendees: \_\_\_\_\_

If hybrid or online, as applicable: \_\_\_\_\_

Meeting Platform: \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Main Contact for Visit: \_\_\_\_\_

Main Contact Preferred Number: \_\_\_\_\_

Preferred method of contact (phone call, text, WhatsApp, etc.): \_\_\_\_\_

## Event #3

Type: Meeting Conference Training Other \_\_\_\_\_

Mode: Onsite Hybrid Online

If onsite or hybrid, as applicable: \_\_\_\_\_

Event Venue: \_\_\_\_\_

Venue address: \_\_\_\_\_

Venue email: \_\_\_\_\_

Venue phone number: \_\_\_\_\_

Estimated number of attendees: \_\_\_\_\_

If hybrid or online, as applicable: \_\_\_\_\_

Meeting Platform: \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Main Contact for Visit: \_\_\_\_\_

Main Contact Preferred Number: \_\_\_\_\_

Preferred method of contact (phone call, text, WhatsApp, etc.): \_\_\_\_\_

**Business Meeting:**

If there will be a business meeting taking place during your visitor’s stay with your District, they should be invited to attend the meeting.

Will a business meeting take place during your visitor’s stay with the District?      Yes      No

Please provide date and time of the meeting: \_\_\_\_\_

If your visitor will attend onsite, please provide the location of meeting: \_\_\_\_\_

If the meeting takes place online:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in): \_\_\_\_\_

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

**Corporate and other club-building opportunities**

Your District should leverage your visitor’s visit to market Toastmasters to local corporations and groups. Your District should arrange three or more events, such as appointments, summits or open houses, etc. This includes corporations, universities, government agencies, associations, nonprofit organizations, and communities. Provide the following information on the appointments that are scheduled.

**First Appointment:**

Name of corporation or group: \_\_\_\_\_

Date of visit/meeting: \_\_\_\_\_

Online meeting information, if applicable: \_\_\_\_\_

Number of participants: \_\_\_\_\_

Short description of group: \_\_\_\_\_

Industry (if applicable): \_\_\_\_\_

Name and role of the individual the appointment is with: \_\_\_\_\_

**Second Appointment:**

Name of corporation or group: \_\_\_\_\_

Date of visit/meeting: \_\_\_\_\_

Online meeting information, if applicable: \_\_\_\_\_

Number of participants: \_\_\_\_\_

Short description of group: \_\_\_\_\_

Industry (if applicable): \_\_\_\_\_

Name and role of the individual the appointment is with: \_\_\_\_\_

**Third Appointment:**

Name of corporation or group: \_\_\_\_\_

Date of visit/meeting: \_\_\_\_\_

Online meeting information, if applicable:

Number of participants: \_\_\_\_\_

Short description of group: \_\_\_\_\_

Industry (if applicable): \_\_\_\_\_

Name and role of the individual the appointment is with: \_\_\_\_\_

**Fourth Appointment:**

Name of corporation or group: \_\_\_\_\_

Date of visit/meeting: \_\_\_\_\_

Online meeting information, if applicable:

Number of participants: \_\_\_\_\_

Short description of group: \_\_\_\_\_

Industry (if applicable): \_\_\_\_\_

Name and role of the individual the appointment is with: \_\_\_\_\_

**Fifth Appointment:**

Name of corporation or group: \_\_\_\_\_

Date of visit/meeting: \_\_\_\_\_

Online meeting information, if applicable:

Number of participants: \_\_\_\_\_

Short description of group: \_\_\_\_\_

Industry (if applicable): \_\_\_\_\_

Name and role of the individual the appointment is with: \_\_\_\_\_

*If more appointments are scheduled, please provide these details on an additional information page.*



## Speeches/Presentations/Training

### Speech/Presentation/Training:

Day, date, time, and length: \_\_\_\_\_

Title: \_\_\_\_\_

Brief Description: \_\_\_\_\_

Audio/Visual needs: \_\_\_\_\_

Other Materials: \_\_\_\_\_

If education session takes place online or in a hybrid format:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

### Speech/Presentation/Training:

Day, date, time, and length: \_\_\_\_\_

Title: \_\_\_\_\_

Brief Description: \_\_\_\_\_

Audio/Visual needs: \_\_\_\_\_

Other Materials: \_\_\_\_\_

If the presentation takes place online or in a hybrid format:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

*If more presentations are scheduled, please provide these details on the additional information page.*

## Media Opportunities

Whenever possible, arrange radio, television, or newspaper interviews for the visitor. Get your Public Relations Manager involved and have them contact the Toastmasters Public Relations team at [pr@toastmasters.org](mailto:pr@toastmasters.org) for a list of local media contacts as well as some tips when it comes to scheduling these interviews. Complete the following:

Type:            Radio/Podcast            Television/Live Stream            Print/digital publication

Day, Date: \_\_\_\_\_

Time, Duration: \_\_\_\_\_

Program Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Content Synopsis: \_\_\_\_\_

Address, if applicable: \_\_\_\_\_

If the interview is taking place online or in a hybrid format:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

Type:            Radio/Podcast            Television/Live Stream            Print/digital publication

Day, Date: \_\_\_\_\_

Time, Duration: \_\_\_\_\_

Program Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Content Synopsis: \_\_\_\_\_

Address, if applicable: \_\_\_\_\_

If the interview is taking place online or in a hybrid format:

Meeting Platform (as applicable): \_\_\_\_\_

Meeting ID/Passcode (information necessary to log in):

Meeting start time/time zone: \_\_\_\_\_ When should visitor log in? \_\_\_\_\_

*If more media appearances are scheduled, please provide these details on the additional information page.*

## **Additional Information:**

If there are any questions or if we can be of any further assistance, please contact the following:

- ▶ Region Advisor visits: [\*\*regionadvisor@toastmasters.org\*\*](mailto:regionadvisor@toastmasters.org)
- ▶ Phone: +1 720-439-5050